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JD Edwards EnterpriseOne CRM Service Management

Overview

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Common Customer Relationship Challenges

CHALLENGES ▶	**CAPABILITIES** ▶	**VALUE**
• Unable to provide 24x7 customer service	• Single embedded customer data base	• Greatly enhanced customer experience and satisfaction
• Lack of customer information impedes exceptional customer service	• Comprehensive, 360 degree view of customer interactions	• Decreased response and resolution times
• Unable to easily match customer profile data with sales & service histories	• Customer Self Service portal provides 24x7 sales and service	• Increased self service capabilities
• Unable to track follow-up activities	• Trouble shooting tools help reduce service requests	• Better coordination and access to key customer data among departments

JD Edwards EnterpriseOne Service Management
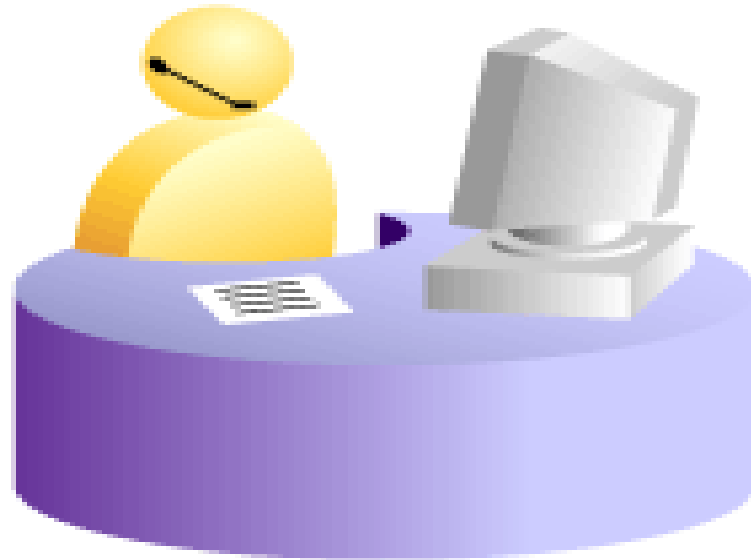
What is Service Management in JD Edwards EnterpriseOne?

Service Management Components

- Equipment Information Management

- Contract Management – Service and Supplier Contracts

- Work Order Management

- Warranty Claims / Supplier Recovery Claims

- Failure Analysis / Solution Advisor

- Branched Scripting

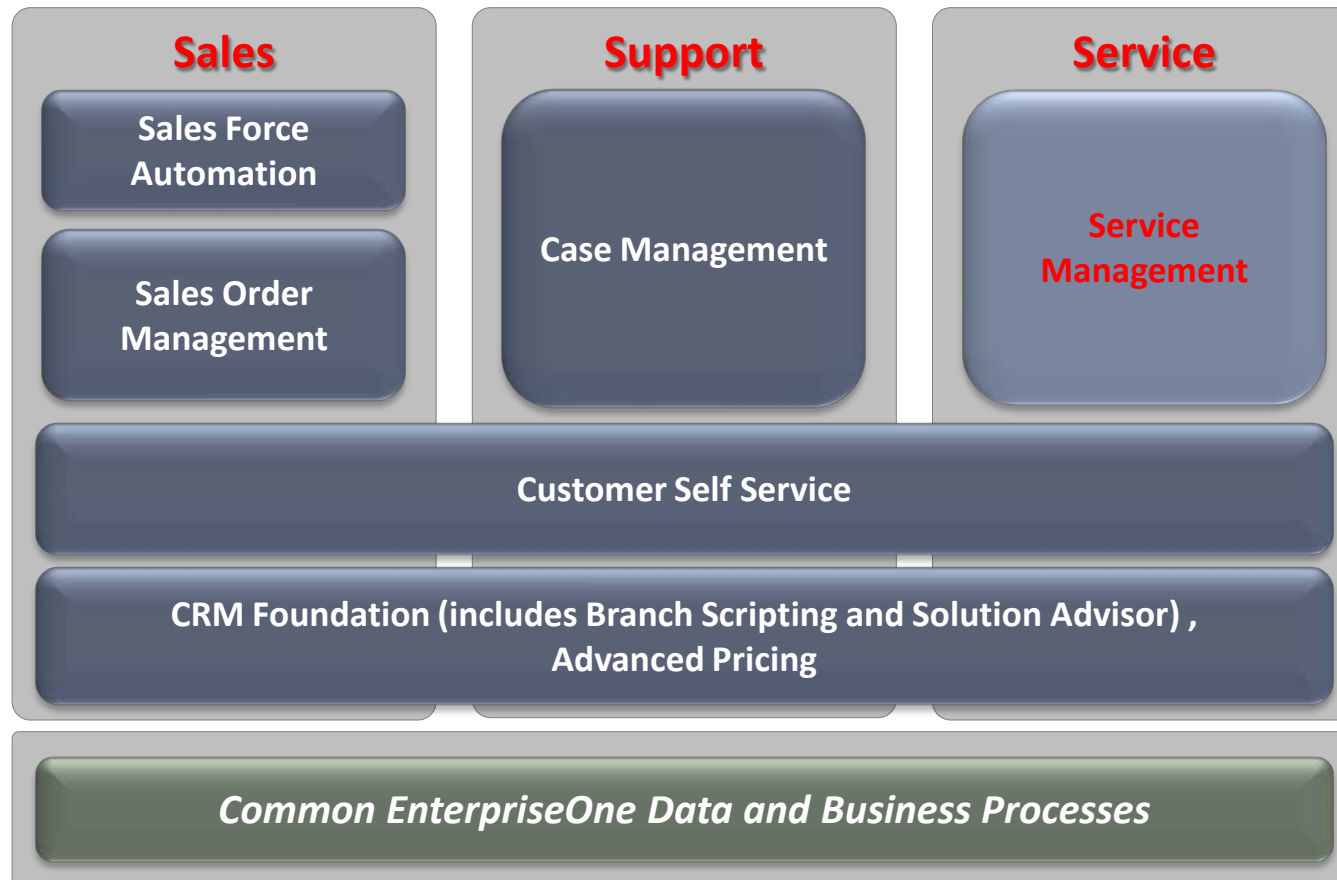- RMA – Return Material Authorization

- Preventive Maintenance

Benefits of Service Management

The Service Management system can help to retain customers by:

– Providing world-class customer responsiveness.

– Operating efficient and cost-effective customer service processes.

– Achieving maximum service revenue on services.

Making customer service more *efficient, profitable, and customer-centric* is the goal of the JD Edwards EnterpriseOne Service Management solution.
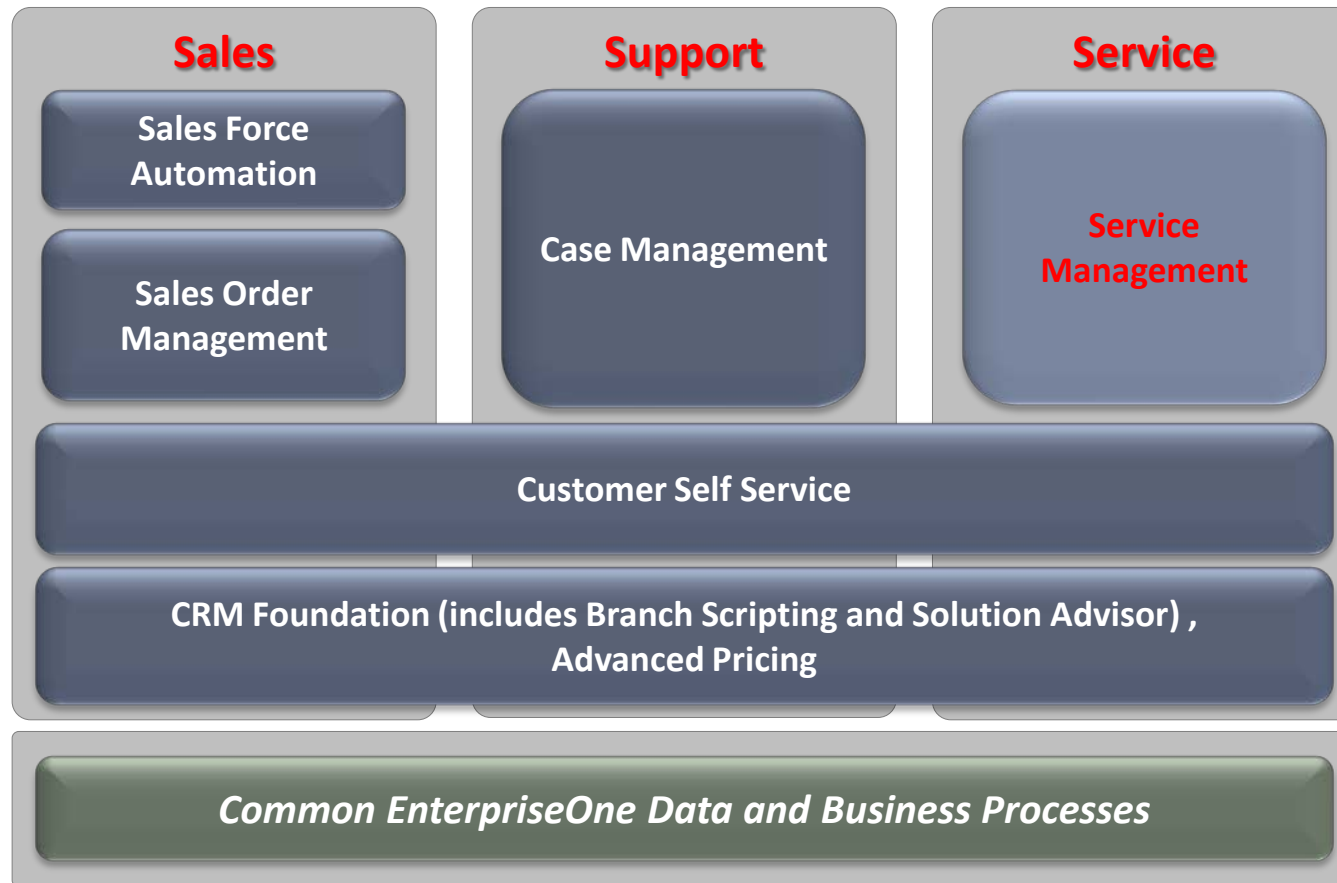
JD Edwards EnterpriseOne CRM at a Glance

Sales	Support	Service
Sales Force Automation	**Case Management**	**Service Management**
Sales Order Management		

Customer Self Service

CRM Foundation (includes Branch Scripting and Solution Advisor) , Advanced Pricing

Common EnterpriseOne Data and Business Processes

✓ **Lead to Order**

✓ **Request to Resolve**

✓ **Install to Maintain**

JD Edwards EnterpriseOne CRM at a Glance

Install to Maintain

Sales	Support	Service
Sales Force Automation	**Case Management**	**Service Management**
Sales Order Management		

Customer Self Service

CRM Foundation (includes Branch Scripting and Solution Advisor), Advanced Pricing

*Common EnterpriseOne Data and Business Processes*

- ✓ Access customer 360°
- ✓ Track installed equipment
  - Customer location/status
  - Site location/Status
- ✓ Service entitlement
  - Service contracts
  - Warranties
  - Supplier Contracts
- ✓ Service work orders
- ✓ Bill for services

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JD Edwards EnterpriseOne Service Management

Install	Request	Service	Bill / Pay

Categories				
FINANCIAL				
HUMAN CAPITAL				
CRM				
ASSET MGMT				
EHS				
PROJECT				
SUPPLY CHAIN/MFG				
TOOLS				

SERVICE MGMT

 INSTALL

 REQUEST

 SERVICE

 BILL / PAY
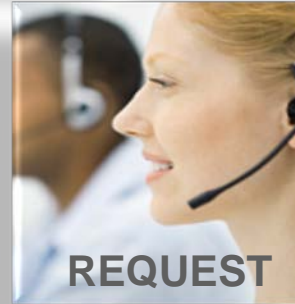
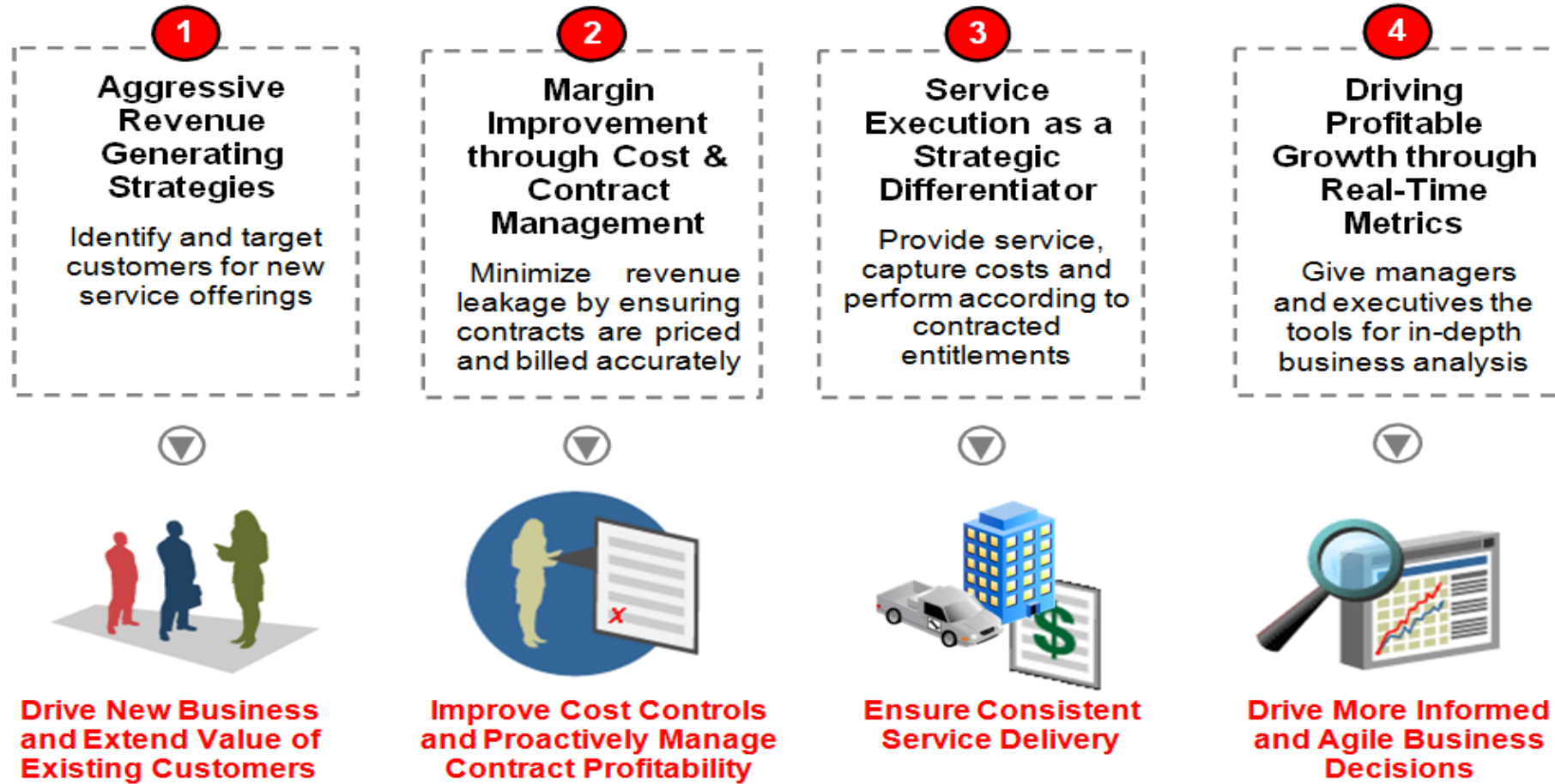|	Install	Request	Service	Bill / Pay
Equipment Information Mgmt	Origination: Fixed Assets, Sales Order Update, Prod Register		Customer / Site History	Location Tracking
Work Order Mgmt	Scheduled (PMs) & Emergency Work Orders		Parts & Labor	Costing, Billing & Payment
Contract Mgmt	Entitlement Checking		Base Warranties & Extended Warranties	Renewals, Suspensions, & Cancellations
Warranty / Supplier Claims Mgmt	Receive & Submit Claims		Roles: Service Providers, Assessors, Supp Recovery Mgrs	Billing: Receivables & Payables
Service Mgmt One View Reporting	Equipment Analytics		Work Order and PM Analytics	Case and Contract Analytics

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JD Edwards EnterpriseOne Service Management

Install to Maintain

Install	Customer Request	Service	Bill/Pay
	▪ Customer calls with issue	▪ Need to send technician to customer site to fix problem	▪ Services invoiced to customer
	▪ Case logged		▪ Technician paid
	▪ Contract entitlement checked	▪ Service work order created	
		▪ Parts and labor attached	

Front Office

▪ Work completed

Back Office

▪ Time Entry   ▪ Customer Billing

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Implementing the Vision
Contract to Services Execution

Service Providers Must Focus On:

1	**2**	**3**	**4**
Aggressive Revenue Generating Strategies	**Margin Improvement through Cost & Contract Management**	**Service Execution as a Strategic Differentiator**	**Driving Profitable Growth through Real-Time Metrics**
Identify and target customers for new service offerings	Minimize revenue leakage by ensuring contracts are priced and billed accurately	Provide service, capture costs and perform according to contracted entitlements	Give managers and executives the tools for in-depth business analysis

Drive New Business and Extend Value of Existing Customers

Improve Cost Controls and Proactively Manage Contract Profitability

Ensure Consistent Service Delivery

Drive More Informed and Agile Business Decisions

Service Work Order – One-Click Navigation

One click access

- ✓ Parts
- ✓ Labor
- ✓ Solution
- ✓ History
- ✓ Related Actions
- ✓ Accounting
- ✓ WO Details
- ✓ Planning
- ✓ Attachments
- ✓ Supplier Recovery

Service Work Order – One-Click Navigation

Service Management Benefits:

- ✓ Improves the efficiency of your field technicians
- ✓ Reduces the number of returned visits
- ✓ Reduces days sales outstanding with quicker billing and collection
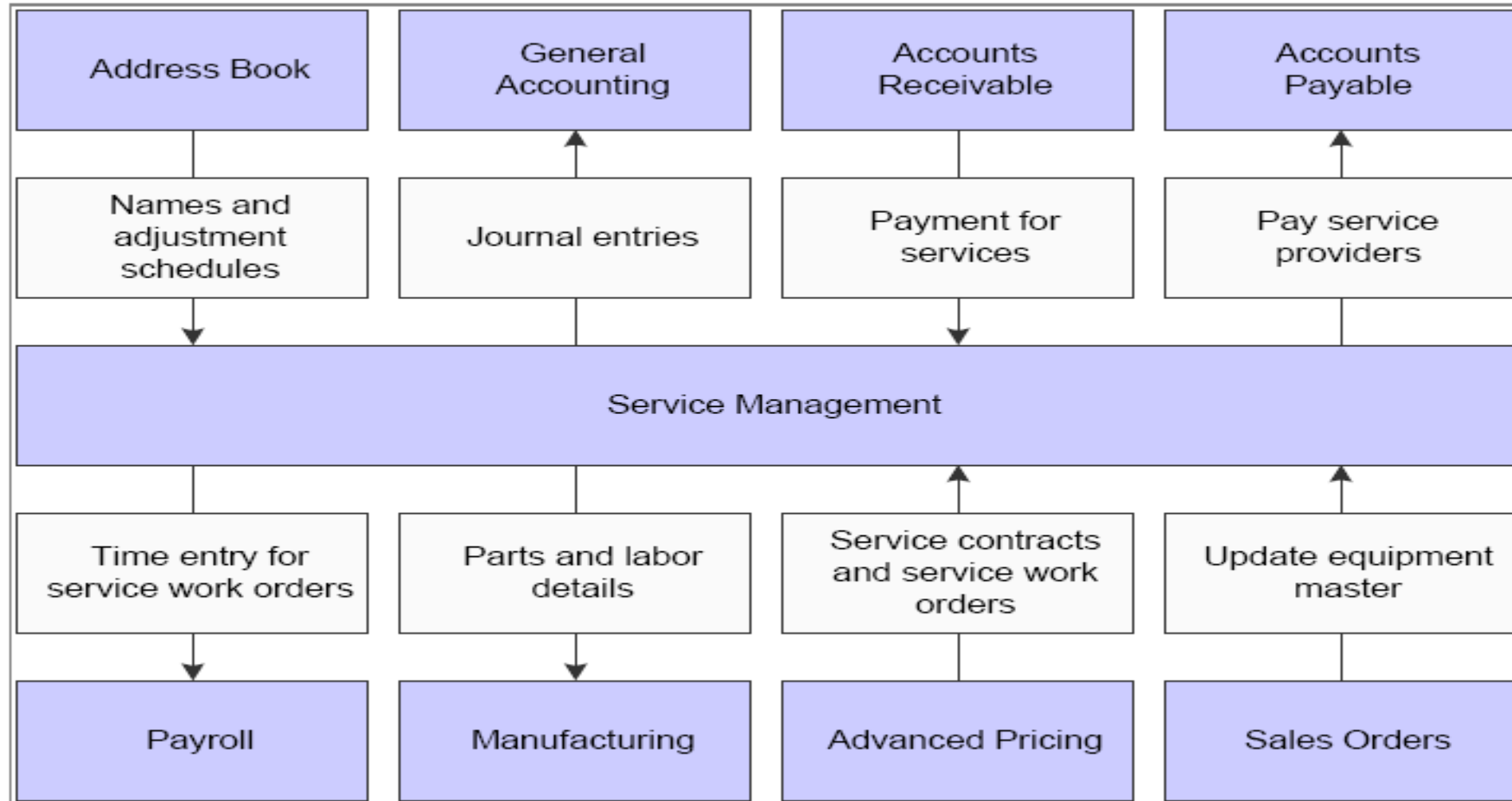
Mobile Asset Management

TODAY!

Choices Today!

- Entire JD Edwards EnterpriseOne suite runs on an iPad

- Speed Case Entry for maintenance request

- Mobile Service Time Entry

- Field Service Work Order

iPad screen:
iPad 10:52 AM 59%

JD Edwards EnterpriseOne

Manage Work Order - Red lights blinking (451282/SE)

Tools

Customer	4242
Contact Name	JOE SMITH
Equipment Number	
Failure Description	
Priority	
Plan	

Open Applications | Recent Reports | Favorites | Pages

Home | Manage Work Order - Red lights blinking | Work with Equipment Master | Work With HR

iPhone screen:
AT&T 12:25 PM
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Service Time Entry
My Timecards
Search

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JD Edwards Integrations with Service Management

CRM Service Management Solution Summary:

Greater Customer Insight
- In tune with customer needs and values
- Leverage knowledge to extending product/service offerings
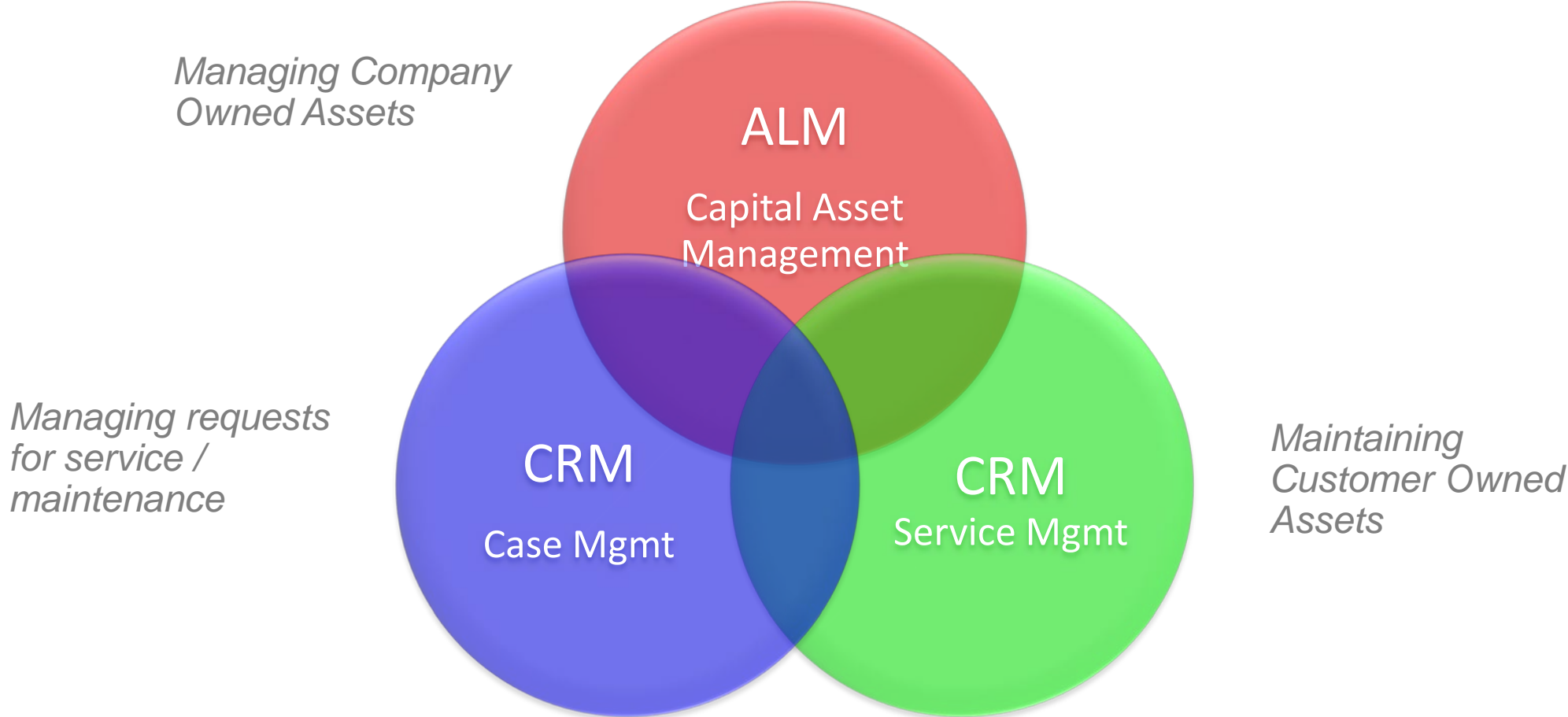
Increased Customer Access
- Deliver on customer expectations
- Enhanced competitive advantage
- Shared key customer data

Effective Customer Interactions
- Increased customer satisfaction
- Increased responsiveness, decreased resolution time
- Targeted interaction

JD Edwards EnterpriseOne Asset Management Products

Enabling End-to-End Business Processes for Maintenance Management

Managing Company Owned Assets

ALM
Capital Asset Management

Managing requests for service / maintenance

CRM
Case Mgmt

CRM
Service Mgmt

Maintaining Customer Owned Assets