Embrace Service Module

Manage Service Centres Profitably, Effectively and Efficiently

EXECUTIVE SUMMARY

Exceed Customer Expectations

Transform service centres from cost centres to a business drivers

Utilise service jobs to allocate parts, post labour, process outwork, post charges and track the progress of a job

Invoice internal and external customers, local and foreign, for work performed

Track all work performed against service items and sub serials

Capacity plan service centres by scheduling future work using the booking and planning board

Project Management

The Embrace Service module is designed to help you exceed customer expectations, improve productivity, increase asset utilisation and control costs. The system will manage, schedule and process service jobs, tracking both unplanned and routine maintenance repair jobs. It is suited for both external and internal workshop environments, whether on site at a customer, as a field service operation, or in a workshop environment—transforming your service centre from a cost centre to a business driver.

Management of costs is centralised and simplified, with all costs, including labour, parts, buyouts, outwork by third parties and other ancillary charges, controlled. Actual costs are measured against set standards, to determine efficiency and profitability.

Delivering accurate job costing and project management across multiple service centres, together with the ability to handle progress invoicing, allows large projects to be managed over their entire duration - from a single source!

Service advisors are sent alerts when services are due, according to either time based or usage based service parameters. Automatic alerts of overdue tasks ensures bottlenecks are managed and facilitates the management of any remedial actions that may be required.

Planned maintenance ensures effective preventative maintenance, improving the life cycle and utilisation of assets. Projected down time planning provides for effective resource and cost budgeting.

Invoices and quotations can be managed per item, per job or per project. Serial number tracking enables service centres to manage both their own or 3rd party warranties and provides a full service history.

The Service module is robust, fully integrated and enables the tracking of parts availability, outwork status, placement of purchase orders and labour tracking used on any job or project. Rework is monitored to measure efficiency, while specialised processes and controls manage warranty repairs, damaged items, loan units, backups and swap outs, with the flexibility of splitting the charges to more than one party.

Designed and implemented to provide extensive user-friendly functionality, enabling workshop management, capacity planning, project costing and the effective servicing and maintenance of valuable assets, whether your own or your customers. The Embrace Service Module will enhance the customer experience and drive immediate business impact, ensuring a fast ROI.

Embrace Customers use Service for:

- Administering service centres profitably, effectively and efficiently.
- Allocating parts, posting labour and charges, managing outwork and tracking the progress of service jobs.
- Invoicing both internal and external customers.
- Tracking detailed Service history.
- Managing capacity by scheduling future work using the planning board, which displays planned and unplanned jobs, with associated resource availability.
- Tracing and tracking swap, backup, loan and damaged units.
- Managing the workload and job activity through tracking and enquiries with drill down to detailed transactions.
- Long-term Project Management.

Embrace Service Module

For more information on any of our products or services please visit us on the web at

www.embrace.co.za

or contact your Embrace Account Manager or Sales Representative.

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Features	Benefits
Service Centre Management	• Manage and monitor Service Centre profitability • Comprehensive Capacity Planning of technicians and bays • Performance and efficiency monitoring with alerts and escalations • Visibility down to specific job line level across all work items
Parts Management	• Streamlined parts allocation process whereby parts can be easily requested, backordered, committed, picked and allocated • Parts can be sourced via Stock Transfers from within the organisation or directly through the integrated Procurements system • Integration into Inventory gives visibility into parts availability, costs and profitability
Labour Tracking	• Flexible labour charging methods to track and allocate technicians' times and costs
Subcontracts and Outwork	• Integration into the Purchasing module streamlines and controls sub contract work that is allocated to a service job • Accurate costs and delivery information are tracked and allocated directly to the relevant service job
Additional Charges	• Charges can be allocated as various expenses to a job or project i.e. travel, accommodation, sundries, consumables, etc. • Handles both specific values or calculated percentage charges, based on existing line values and amounts
Work in Progress	• Detailed financial information tracks all work in process, giving management visibility into cost, revenue and profitability
Service Planning Board	• Efficient control of future planning by the service manager • Monitor resource availability to better manage capacity planning by bay or technician
Service Job Location Manager	• Track individual jobs by location with direct drill down . • Manage a smooth and timely flow of work through the service centre and locations with alerts to expedite individual jobs.
Item Management	• Visibility on Service items (Master and Sub serials) including full drill down into all service history, associated costs, warranties and all jobs details, for the lifetime of a serviceable item • Control over Warranties, Swaps, Loans, Backup units and Damaged units • All job maintenance history is available, together with an online Service Log Book
Pre Delivery Inspections (PDI) and Commissioning	• Collate all the tasks and costs required to commission an item or installation, including tracking issues and yields received from the job, in a single view

Service Highlights

Service Centres

Depending on the organisations' requirements and physical structure, different service centres can be established, allowing branches to have as many service centres as required. Centralised service centres can assist satellite service centres, whilst certain service centres may be established as a centre of excellence and sub contract (perform outwork) on behalf of other service centres. All transactions between these service centres are automated, transparent and updated real time.

Service Items

Rules can be defined governing how a service item is handled. The item may link to a fixed asset number for servicing assets or it may link to a customer to provide a view into customer items.
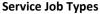
Sub serials may be set up enabling the sub serial to have its own warranty details and templates, separate from the main item. Depending on the asset type, pertinent information can be captured using user defined templates.

If it is essential for servicing of registered items to be strictly controlled, servicing of unregistered items can be prevented as well as blacklisted.

Each item can be closely monitored and managed. Service history, per item, with drill down into job detail shows the full transactional history. Using policies defined, warnings are sent when services are due, and if necessary, these activities can be escalated to the relevant manager or team.

Tightly integrated into the Service Module, the Contracts, Rental and Fixed Assets Modules facilitate the analysis of Item costs and profitability. The Fleet Dashboard allows an extensive, integrated view of each item, with full drill down capabilities, to service history and profitability.

Service Job Types

In order to differentiate between activities that drive the different processes, different job types can be applied, with unique numbering for each type.

Service Jobs can be charged to multiple parties, including Customers, Third Parties, Vendors, Warranty, Rework, Maintenance, PDI, Assets and directly to Internal expense accounts.

Fault Codes / Sub Job Types

Service jobs can be broken down into Job Sections (by fault code). This allows individual sections to be managed and controlled separately without having to open a new job for each type of work performed for the same item.

A section can be invoiced and costed specifically to an asset account or rework, for example, external customer invoice, internal customer invoice, warranty costs and vendor claims.

A quotation can be for an entire job or per section or fault within the job. The customer selects which quotation items to accept or reject and the accepted items on the quotation are simply converted, at the click of a button, into a service job.

Parts Sourcing

Parts can be sourced from multiple warehouses, directly or by means of transfer requests. Sourcing rules with other branches and service centres are defined according to company policies. Full visibility into group stock shows availability, ensuring improved customer service.

Parts may be issued directly to a job, or processed through picking slips. Buyouts are raised directly from within the job and rules set to ensure faulty parts are returned.

Service Highlights

Labour
Different types of labour tracking are available. The service module can be integrated into a clocking system where employees clock on and off jobs, using bar codes and tags. Labour is posted using either timesheets or standard times, to calculate the labour. Labour costs can be optionally apportioned, using labour posting or operate on standard time.

Outwork / Sub Contracts
Outwork will track all work performed by outside suppliers in respect of a service job. The outwork is linked to an integrated purchase order ensuring that costs and delivery details are accurate and seamless. The supplier could be either an internal or external supplier and the tight integration into Embrace Procurements enables purchase orders or requisitions to be raised directly from within the service job environment, ensuring full traceability.

Charges
Multiple charges can be allocated including consumables, collection and delivery charges, overheads or any other charge that may be applicable. These can be charged as flat amounts or expressed as percentages of other amounts on the service job.

Comments
Detailed comments and instructions can be added to a job at any stage. These details are visible online and can be printed on the job cards, picking slips and delivery documentation. This reduces the risk of errors, saves time and increases customer service.

Pricing
Standard pricing or customer specific pricing can be used, with flexible pricing options to allow predetermined pricing or, alternatively, the service centre to charge what is appropriate, based on the associated costs. Outwork, subcontracts and buyouts can be priced according to a pre-determined mark up matrix, to ensure margins are attained.

Standard Jobs
Standard jobs can be preconfigured, including parts, labour and outwork. Adding a standard job will automatically load all associated elements as a Bill of Material, ensuring accuracy and ease of use.

Book-In
A Daily Register records all items due for service on a particular date. Job types can be predefined for each register entry with updates to the Planning Board reflecting the available capacity.

Control Features
Security restrictions per function and / or operations can be enabled per user or group of users to ensure only the authorised users are able to perform the task required. Controls can also be provided per make and model.

PDI (Pre Delivery Inspection)
Bespoke machinery, vehicles, property or systems may require changes, swaps or inspections, before the item can be sold, taken into stock or capitalised. Embrace Service PDI can collate all the tasks, costs, multiple issues and yields received from the job, into one complete, balanced transaction, with labour, components and subcontracting costs included.

Once completed, the final product, including all spares, is costed and returned to inventory for subsequent use.

Service Highlights

Quotations
A quotation allows customers to see what the estimated costs are for the work required. Rules can be set for a quotation to be compulsory. For example, if the value of the job exceeds a predetermined value, certain customers may require a quotation, or Service Centres may have limits within which they can perform work without prior approval.

Multiple quotations for one job per section or fault can be prepared. Multiple versions of a quotation can be retained, while a quotation enquiry is available for comparisons. Once selected, any version of the quotation can be converted into a job. Partial or complete conversions can be processed, as quotations are accepted or rejected per job, section or fault.

In some cases, parts, labour and other charges are required to prepare the quotation. These charges can be added to a quotation and if not accepted, a quotation rejection amount can be levied, based on costs incurred.

Warranties
Comprehensive warranty details are kept per item (serial and sub serial) and when a service job is opened, this information can be used to determine the type of job and work that may be required for that specific item.

Warranty types catered for include Own Warranty, Vendor Warranty, 3rd party and Rework. Specific parts and fault codes can be excluded from the warranty cover. Warranty tracking can be accessed by unit and by date.

Loan Units and Swap Units
Loan, backup and swap units are managed with full visibility and control. If sub serials are active, or refurbishments common, the swap history can be kept per sub serial, detailing where a sub-serial has been previously used. Swap, backup and loan items may be kept isolated for control purposes, with specific policies defining how and when these units may be used. These policies can, for example, determine that if an item is swapped out, the original must be returned as damaged and an associated % charge is applied to the job.

Invoicing and Credit Control
Credit control can be optionally applied while the job is open and authorisation levels of a specified value can be managed. Partial invoicing of jobs as and when work is completed is supported. Invoices can be raised in foreign currency, using the Multi-currency module. In addition, progress invoicing is available to manage percentage completed invoicing for large scale service jobs, that may span multiple periods.

Internal Jobs
Internal jobs can be set up to be billed at monthly intervals, where intercompany charges are allocated on a regular basis for any work carried out between business units, on behalf of one another.

Financials
Online and real time updates of all financial transactions and journals are available.

Work in process (WIP) shows the value of the jobs which are currently being worked on. By striving to keep work in progress to a minimum, the organisation is able to reduce the amount of capital tied up. Enquiries and reports gives management full visibility of this information.

Performance Monitoring

Workshops can be split into multiple locations and bays to facilitate active work load balancing and monitoring within these locations. User defined parameters determine the maximum number of open jobs allowed per location or per technician and the maximum turnaround time expected within a specified location. Using associated alerts and escalations, Workshop management are able to effectively monitor, manage and efficiently control the workload across the board.

Service Highlights

Drilldown and Job Tracking

The Embrace Service module supports multiple tracking methods, i.e. Real time tracking of Service history per customer or service item; Job status; Job activity and Job Labour. Job enquiries can be based on status and dates for Service centre, Location, Customer, Service item, Employee, Make or Model. Detailed service history enquiries are accessible, with drill down into the job details, giving management all the information required to manage and track all jobs, easily, efficiently and effectively!

Capacity Planning / Planning Board

Schedule future work efficiently and effectively, using the planning board which shows both planned and unplanned maintenance, with resources available and a status colour indicator.

Service Job Location Manager

Managing jobs as they move from one location to another can be challenging. The Service Location Manager tracks the status of each service job through user defined locations, giving the workshop manager full visibility, with direct drill down into the service job details and status.

"Embrace keeps the 'Full Service History' for the lifetime of each and every vehicle sold.

Every authorised MAN workshop has a clear view of this information. Customers can service their vehicle at any MAN dealer, anywhere in Southern Africa!"

**Ian Wallis
Group IT Manager
MAN**

RELATED SERVICES

Embrace Support Representatives can assist with designing solutions and implementing additional requirements

Application Support through the ACS Support Centre

Embrace Training

For more information on any of our products or services please visit us on the web at

www.embrace.co.za

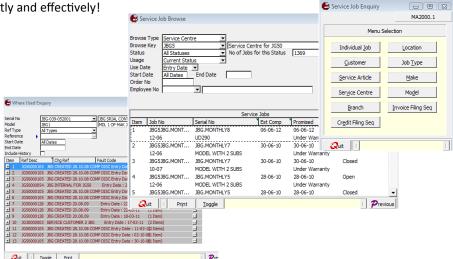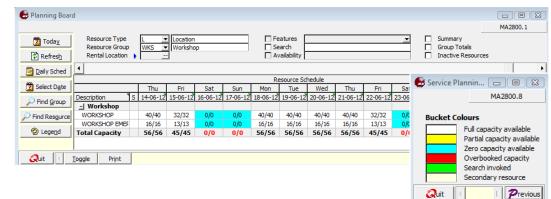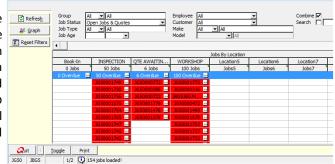or contact your Embrace Account Manager or Sales Representative.

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