



# 2020 Insight

## Service Management

Your field service teams often have more face-to-face contact with your customers than anyone else in your business—giving you both a responsibility and an opportunity to provide a valuable touch point for your brand. Arm your teams with the information they need for success and build customer service into your everyday processes.

The 2020 Insight Service Management module integrates with supply chain and production management to provide a post-sale link between the customer order and the customer. Whether the system is used to track replacement and rework

components or is tied directly to a customer order installation, the integrated, well-executed 2020 Insight system increases customer retention and manufacturing profitability.

### Benefits

Increase productivity and efficiency by integrating installation services into your production processes

Meet customer expectations by having a more complete view of the service process

Schedule appointments more efficiently without overlapping resources or equipment

Match job requirements to technician skill sets

Capture critical information such as drawings, sales order details and replacement parts in one location

Improve customer communication

Improve on-time performance and service quality

Provide accurate job costing by learning from the service data tied to your production environment

Enhance project management

# Increase customer satisfaction and grow your business

With the 2020 Insight Service Management module, you can initiate customer service orders directly from the original sales order or ad hoc, ensuring alignment between product completion, delivery and service scheduling. 2020 Insight provides a holistic view of the overall service schedule, making it easy for your scheduling team to manage time, resources and equipment for each job. With our optional mobile applications, you can also provide field service technicians with direct access to manufacturing data such as 2D and 3D drawings, bills of materials and sales order details to ensure timely and accurate customer service.

## Manufacturing Data Access

Provide your service schedulers with the visibility to manufacturing information and customer order status so that they know when a job is ready for delivery and installation scheduling.

## Installation Project Management

Manage and schedule job site installation services for one or multiple orders based on sales order and installation requirements.

## Job Site Management

Monitor project resource utilization, signoffs and completion dates in real-time, to keep you top-of-field in customer service initiatives.

## Shared Calendars

Access a consolidated view of resources and equipment based on schedules, complexity and customer needs.

## Optional Field Service Mobility Application

The 2020 Insight Field Service Mobility app is tied directly to 2020 Insight at your plant and accesses data from the Service Management module. Application access is enabled with a 'named user' implementation via an annual subscription model, either individually or bundled for a group of users.

Offer your field service team the tools they need to deliver a superior level of service excellence for every customer.

- View service documents and drawings
- Initiate replacement orders in real time
- Scan and confirm deliveries
- Acknowledge and confirm installation activities
- Upload photos and/or documents to a customer account or sales order from the field
- Access master installation scheduling calendar tool

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## Requirements for Implementation

- 2020 Insight Version 11 or higher
- SQL 2017

## Requirements for Mobility Apps

- Web Service Hosting (on premise)
- Internet access with web server (open to internet)
- Mobile devices (Android or iOS)

## Ordering Information

IS.SVC.COR	Service Management Module
IS.CAL.IWH	Web Services client access license (optional)
IS.SAL.MSV	Field Service subscription license (optional)