

Integration with IBM iSeries ERP

Infor Service Management is an integrated system for managing service departments. It provides the access to data that frontline workers in service organizations need, whether they're in the call center, repair depot, field service, technical support, quality departments, or other third parties.

Service Management was designed to share data and transactions with IBM iSeries ERP. Heavy investment has been made into building integration for Service Management with the iSeries ERP platform, to eliminate the need for inefficient and error-prone duplicate data entry.

Service Management data is housed in DB2 on the iSeries, and lets you leverage the data you already have. There's no need to reinvent the wheel every time you process a service transaction.

Thanks to this integration, you can replace the myriad spreadsheets, point solutions, work-arounds, and handwritten paper files with a single, powerful system.

Key integration points

Integration points in Service Management let users conduct the following transactions seamlessly:

- Load master/code file information automatically
- Load part availability information
- Update shipping information
- View and update inventory information and

transactions

- Create customer orders in ERP
- Create manufacturing orders
- Create purchase orders in ERP
- Create credit memos in ERP
- View and apply ERP or system price books
- Apply ERP order processing options
- Use APIs for customer-facing web pages

Master and code files

Service Management accesses master and code file information in your iSeries ERP, so IT and users don't have to spend time manually setting up and maintaining key information. Accessed master and code file information includes:

- Bins (Locations)
- Buyers
- Carriers
- Components
- Countries
- Currency Codes
- Customers
- Customer Addresses
- Customer Price Codes
- Free on Board Codes
- Item Availability
- Item Inventory
- Item Master
- Item Classes
- Ledger Codes
- Manufacturing Orders
- Planners
- Price Book Ids
- Product Features/Options
- Products

- Salesmen
- Serial Numbers
- Shipments
- States
- Units of Measure
- Vendors
- Warehouses
- Work Centers

Inventory

Inventory is always kept up to date thanks to the integration of Service Management with iSeries ERP. Staff no longer need to reconcile data with ERP inventory, and larger, costly problems arising from manual keying errors are virtually eliminated.

Service department personnel can access part availability information and perform transactions in either the ERP or Service Management to manage inventory. On-hand quantities in both systems are maintained and kept in-step with each other. You can also automatically combine materials demand in Service Management with item availability in the iSeries ERP.

Service Management accommodates any type of warehouse: service-only warehouses for handling customer-owned parts (non-integrated warehouse), as well as company warehouses (integrated warehouse). You can even transfer materials between the two types of warehouses.

Item Pricing

Service Management provides the option to keep your own pricing system or to use the existing pricing logic already available in your ERP.

Service Management lets you price in multiple currencies, and dynamically override Price Book, Customer Price Code, and Currency when you need to, depending on user security settings.

Customer Order Management

You can use Service Management documents to create customer orders and credit memos directly in Customer Order Management (COM) in your iSeries ERP.

Users transfer information from customer claims, incidents, quotes, RMAs, and work orders created in Service Management to create customer orders and credit memos in the ERP.

Service Management provides the option to either process orders immediately on the fly or in batch.

Information about the order is constantly updated in Service Management, including order number, invoice number, date shipped, date invoiced, etc.

Manufacturing Orders

Service personnel have the option to use manufacturing orders instead of service work orders. They can choose which method to work with on a case-by-case basis.

Service Management is fully integrated with the manufacturing order system. It consolidates the creation, dispatch, and editing of work orders, as well as reporting, regardless of which work order system you choose for any given repair.

Users can choose from many options when creating and maintaining work orders and manufacturing orders. They can create them from scratch, use templates maintained in Service Management, or use item process records from the iSeries ERP system.

Service Management captures all time, labor, and costs associated with a manufacturing order. You can also track progress on the manufacturing order at any time from Service Management.

Purchase Orders

Technicians can research whether a part or product is under warranty with a supplier from Service Management. The technician can create a purchase order directly in the ERP to file the vendor claim.

Benefits of Infor Service Management

Powerful analytics

Accurate analytics so you can quickly identify:

- Warranty expense
- Service contract profitability (SLA)
- Repair revenues
- Bottlenecks in repair depot
- Inventory churn, overall, and by location
- All costs associated with the repair of a customer's product
- Many others

Faster processes

Automated data transfer for faster processes,

reduced manual errors, and lower costs:

- Up-to-date warranty and service contract status information
- Standardized data capturing, display, and transfer for faster, more accurate processing of RMAs, claims, returns, repairs (on-site and off-site), loaners, etc.
- Centralized knowledge base with fully documented information on product defects, repairs
- Option to process claims submitted over the web, instead of fax or written claim submissions
- No need to manually reconcile data between service department and ERP
- Time spent on processes that used to require manual research goes from hours to minutes

Enhanced customer service

- Single, unified ticket for every call and every customer, for more complete incident management from beginning to end
- Ability to issue return authorization number, notify customer by email, create customer orders for advance replacements, create work orders for repair, all in just minutes
- Numerous customer facing web page interaction points (warranty registration, RMA, claims, etc.)

Optimized resources

- Flexible methods for assigning tasks to technical support and field service resources
- Schedule and plan field service technicians by geography, in-process work, dispatch



capabilities, and others

- Dashboards help you immediately identify bottlenecks, issues

Advanced technology

- Web-based solution installed on a web server — no software to install, maintain, or upgrade throughout your organization
- Customizable user interface and navigation lets you fit the system to your business processes
- A truly global solution with multiple language and location capabilities
- Top-quality documentation, technical support, and sales support

System Requirements

Category	Requirements
Server	Hardware <ul style="list-style-type: none"> • Processor: Dual/Quad Core • Processor Speed: 2.93-3.16 GHz • Memory: 4-8 GB RAM • Examples: <ul style="list-style-type: none"> ▪ IBM System x3650 Quad Core ▪ IBM System x3550 7978 - Dual-Core Intel® Xeon® 5140 ▪ HP ProLiant DL320 G5p - 1x Quad-Core Intel® Xeon® 3210 ▪ Dell Server PE2900 Quad Core 3.16 GHz Intel® Xeon® X5460
	Operating System <ul style="list-style-type: none"> • Microsoft Windows Server® 2003 or 2008
	Web Server <ul style="list-style-type: none"> • Microsoft IIS 4.5 or above (comes with Windows Server)
	Other <ul style="list-style-type: none"> • Microsoft SQL Server® (SQL Server Express® downloadable free) • IBM Client Access® 5.2 or above • Disk Space: <ul style="list-style-type: none"> ▪ Application: 400MB ▪ System Database: 250MB
Client	Microsoft Internet Explorer® 8 or above
iSeries	Operating System <ul style="list-style-type: none"> • V5R3 or above
	XA <ul style="list-style-type: none"> • V6 or above including V9 • Controlled Warehouses (for inventory integration)

For more information

To get a personalized demonstration of how Service Management can help you improve profitability in your service department, contact RMB Solutions at sales@rmbolutions.net or at **(303) 791-5775**.

RMB Solutions

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