As a Full Spectrum ERP solution, Centerprism fully addresses Field Service Management with a turn-key scheduling, dispatch, and work order entry system that is tied to custom service agreements that manage customer equipment. Through a single Work Order Entry screen, users can quickly schedule service appointments for customer equipment assigned to a service or maintenance contract. Additionally, parts can be added, and technicians, attachments, and web links can be assigned to work orders which can then be installed, billed, or invoiced through an integrated financial accounting system. All activity can be viewed with general Order Entry transactions. The Centerprism advantage is that the Field Service module is fully integrated with Customer, Inventory, Vendor, CRM, and Financial modules allowing 360 degree reporting. Sales and inventory updates are instantly reflected without any database synchronization.

Scheduler & Dispatch

Technicians can be dispatched through an activity scheduler that is integrated with Centerprism's CRM and Service Management system. Service appointments can be scheduled through Work Order Entry or other modules. Mobile calendars are automatically updated allowing field engineers to update status and log in hours.

- **Access to all activity –** View Service appointments along with other activity.
- **Ticket # –** Automatically creates ticket #.
- **Mobile calendar –** Automatic updates.
- **GPS Mapping integration.**
- **Help Desk Integration.**
- **Dispatch dashboard –** Track Technician and service activity against service contracts or customers. See completed tickets, routes, or status.
- **Contact Dashboard –** See activities, notes, opportunities, equipment, and collection activity in one screen.
- **Email and Text notifications.**
- **Automatic pre-set notifications –** Based on equipment warranty.

Service Agreement Management

Build custom service contracts for each client using a Service Agreement Management screen. Multiple service Agreements are assigned to customers and equipment. Track a host of parameters including warranty and budgeting information. Service Agreement end date notifications are generated based on the service agreement. A Service Agreement Manger screen allows easy assignment of contracts to multiple customers. Additional information can be assigned to a service agreement including:

- **Technician.**
- **Service Managers –**Technician.
- **Sales personnel –** Salesperson.
- **Start and End Dates.**
- **Expiration dates.**
- **Status –** Draft, Active, Cancelled, or Expired.
- **Approver –** User.
- **Administrator.**
- **User Defined Fields.**

Work Order Entry

A separate Work Order Entry (WO) screen allows users to manage service work transactions for clients. From a single screen, users can assign equipment and parts, and schedule service appointments that can be billed instantly. Work orders can be linked to custom service contracts. Users have access to all customer sales transactions and activity history.

- **Complete History View -** Sales, Service, and A/R history is available given complete integration with other modules.
- **Combine into one transaction -** inventory parts, service and labor tasks, and customer equipment can combined on a single work order.
- **Inventory & financials instantly update.**
  Auto create PO for back-ordered parts.
- **Launch & track multiple service calls.**
- **Assign Technicians.**
- **Attach Documents or URLs.**
- **Build Pre-Defined tasks –** to assign to WO.
- **Link to Service Agreements.**
- **Track status of Work Orders.**
- **Take Payments.**
- **Signature Capture –** available at the work site via technician's tablet.

Equipment Manager

Equipment used in work orders is managed through an Equipment Maintenance Screen. Equipment can be maintained in a separate item database. and can be combined with parts from a parts database when entering work orders or scheduling service work. Each equipment item has a unique ID number along with price, bin, warehouse location, and service plan. Equipment numbers can be assigned to customers through an administration tool. Additional information can be tracked.

- **Equipment Types.**
- **Serial Numbers.**
- **Service History -** with meter readings, warranty plans, assigned technicians.
- **Service Alerts –** notifications of scheduled service maintenance.
- **Expiration Dates.**
- **Status** of Equipment (user defined).
- **Dimensions.**
- **Class ID.**
- **Attachments – Images or URL.**
- **User-Defined Fields.**

About Centerprism

Centerprism delivers a low cost, fully integrated software application dedicated to reducing Enterprise Resource Planning (ERP) complexities for small to mid-sized businesses. This all-in-one product replaces multiple software solutions often cobbled together to accomplish the same business objectives.

Sales@Centerprism.com

1.800.814.6631
Centerprism.com