

# **Optima Pro – Use Cases**

# Topics

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- 1 Introduction
- 2 Account Management
- 3 Product Inventory Management
- 4 Entitlements Management
- 5 Service Organization Management
- 6 Case/Work Order Management
- 7 Scheduling/Dispatch Management
- 8 Service Quote/Invoice Management



# Introduction



# Optima Pro - Introduction

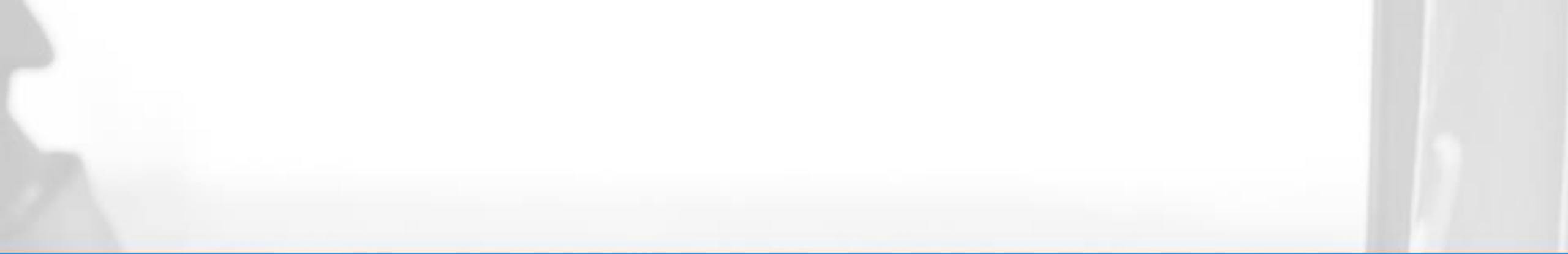
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- Optima Pro is your one stop field service software solution to manage your service organization while delighting the customers and driving business results.
- Built in process for managing the complete Service Organization which includes Territories, Teams, and Technicians along with their Skills, Expertise and current location to effectively manage the entire Service Organization.
- Geo-location based dispatch for cost effective and timely service. Built in process to define the rules to auto check the Warranty and Service Contracts so that you don't miss out any revenue opportunities and do not provide free of cost services anytime.
- Pre-configured support for Preventive Maintenance ensuring you don't miss out on periodic maintenance services for customer products.
- Regular service ensures better performance and less breakdowns ensuring higher revenues from the Service Contracts.
- Field service industry is one segment that is often under pressure to synchronize their tasks. They have the high-end responsibility of keeping a track of on-site service, dispatch of technicians for installations, repairs, maintenance and honoring the customer SLAs and Optima Pro is built to benefit the Industry with effective solutions for these problems.

# Optima Pro – Introduction

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- Manage the complete Service Organization which includes Territories, Teams, and Technicians along with their Skills, Expertise and current location.
- Geo-location based dispatch for cost effective and timely service.
- Auto check the Warranty and Service Contract entitlements.
- Automated dispatch of field service technicians ensuring that you have the right technician at the right place and at the right time.
- Request parts on the fly from fellow technicians and depot locations by the appropriate stock search. Find parts sooner than ever now.
- Pre-configured for Salesforce1 to give Field Service Technicians the access to the live data for view and updates anytime and anywhere.



# Account Management



# Optima Pro – Account Management

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Built-in standardized processes for:

- Account Management - Supports Account Hierarchy for larger corporations.
- Contact Management – Child Relationship with Account
- Location Management – One Account may have one or more locations where the serviceable products are installed. It is recommended to have at least one location per account. For internal accounts, location is also used to capture inventory locations, technician trunk stock and depots/warehouses.
- Geo-location/Address Management – Account/Contact/Location Addresses and geo-location coordinates for Google Maps display and tagging.
- Installed Product Management - Support for adding product warranties, adding child installed products for service parts replacements, etc.



# Product Inventory Management



# Optima Pro – Product Inventory Management

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Built-in standardized processes for:

- Product Management – Supports pricebooks, product family and other categorization. Ability to define prices on the fly for the products/service parts or retrieve the prices from standard pricebooks at runtime.
- Inventory Management – Ability to maintain product stock along with support for generating automatic stocked serials when required.
- Place parts request from fellow technicians or place parts order from vendors/OEMs from within the system. Also track the shipment of the parts to closure within the system and update the inventory when parts are received.
- Stock Transfers – Transfer product stock from one inventory location to another using standardized processes.
- Stock Adjustments – Adjust product stocks in case of breakage, loss, damage etc. of product stock.

# Entitlements Management and Preventive Maintenance

# Optima Pro – Entitlements Management & Preventive Maintenance

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Built-in standardized processes for:

- Warranty Terms – Template to define the coverage of product warranty which includes labor, material and other expenses.
- Tenure Based or Counter Based Coverage – Ability to define tenure based coverage based on the Warranty terms or Usage based coverage based on the product counters defined with the Installed Products, service contract or warranty.
- Product Warranty – Warranty records in the system associated with the Installed product based on the specific Warranty Term. In rare cases more than one warranty records are possible for an installed product.
- Service Contracts – A contract for maintenance of products/services as per the define Service Plan. Service plan comprises of Pricing, product/location/account/contact coverage, preventive maintenance plans and other details of the service plan. The Service plan feeds into the service contract which can be signed for a particular account.
- Preventive Maintenance – Ability to define preventive maintenance templates and automate the process of generating work orders along with tasks automatically as per schedule.
- Warranty Claims – Register the record of warranty claims for the OEM and send the report when required.

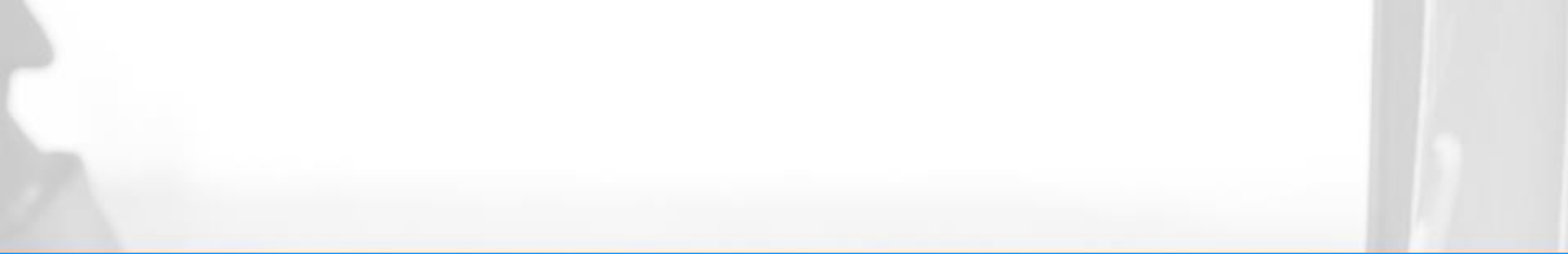
# Optima Pro – Entitlements Management & Preventive Maintenance

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Built-in standardized processes for:

## **Auto Entitlement Check**

- This feature enables the user to automatically perform entitlement check based on the details of the work order.
- All valid warranties and service contracts are checked to determine the one applicable with the current work order as per the defined terms and conditions in the rules.
- The respective warranty or service contract record is utilized for the work order and the work order lines/ Proforma Invoice lines respects the pricing as defined in the service contract/warranty.



# Service Organization Management



# Optima Pro – Service Organization Management

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Built-in standardized processes for:

- Skills Management – Ability to capture organizations skills and assigning them as expertise at the Technician and Service Team level.
- Technician Management – Auto update of technician current GPS location for finding the nearest technician for the customer. Each technician also has a trunk stock inventory associated for better tracking of inventory.
- Service Teams – For effectively tracking the dispatcher access, maintaining the team level skills/expertise, service location coverage etc.
- Service Territory – Service territory configuration with its coverage based on country, state, city and zip code. Ability to auto generate zip based coverage for a service territory. Service Territory hierarchy is also supported.
- Skills, Service team and Service territory are essential parameters to find the right technician for the work order.



# Case/Work Order Management



# Optima Pro – Case/Work Order Management

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Built-in standardized processes for:

- Capturing the incident information as a Case.
- Ability to capture actual work order information separately along with other information needed to actually perform the service/repair of an installed product.
- Ability to perform Auto/Interactive entitlement check at both Case and Work Order level for better work dynamics.
- Capture work order lines to record details about the work performed during the service operation including, spare parts, expenses, labor charges etc.
- Ability to perform Auto/Interactive dispatch of a Technician for the work order.
- Ability to validate the location address of the installed product.
- Ability to request parts from a fellow technician or from a warehouse. Ability to place an order directly to the Vendor in case spare parts are not available nearby.
- Ability to create service Quotes and Proforma Invoices based on the information captured in Work order lines.



# Scheduling/Dispatch Management



# Optima Pro – Scheduling/Dispatch Management

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Built-in standardized processes for:

- Ability to assign technician to a work order in both Interactive and Auto mode.
- Ability to define Technician dispatch rules which captures the criteria for qualifying work orders and then define parameters on which the technician is selected and assigned to the work order.
- Utilize the Work order detail page to select the dispatch mode (auto/interactive).
- Once work orders are scheduled manage the dispatch seamlessly using TimeSlate Pro - Another sound product from Damco Solutions (details covered later in the presentation). Change schedule by drag and drop and automate the processes on schedule change as per your specific needs.

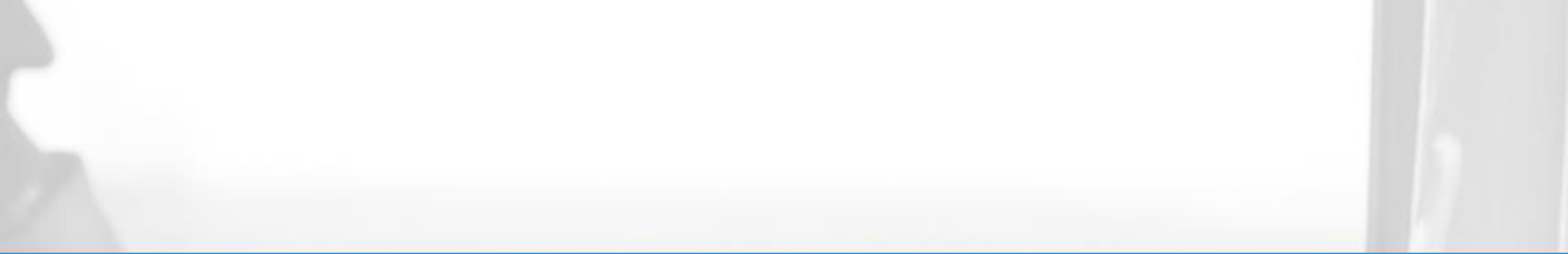
# Service Quote/Proforma Invoice Management

# Optima Pro – Service Quote/Proforma Invoice Management

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Built-in standardized processes for:

- Generate Service Quote based on the work order lines captured and send to the customer in a PDF format.
- Ability to create service quote revisions with the change in work order lines.
- Generate proforma invoice and invoice lines with the correct billing information including the prices from service contract/price books, adding discounts and utilizing other contractual information from service contract.
- Define characteristics of a Proforma Invoice by defining the proforma invoice rules which are respected for the given work order if applicable.
- You can choose whether to include the work order line in Service quote and Proforma invoice.



# Recommended Product Usage Flow



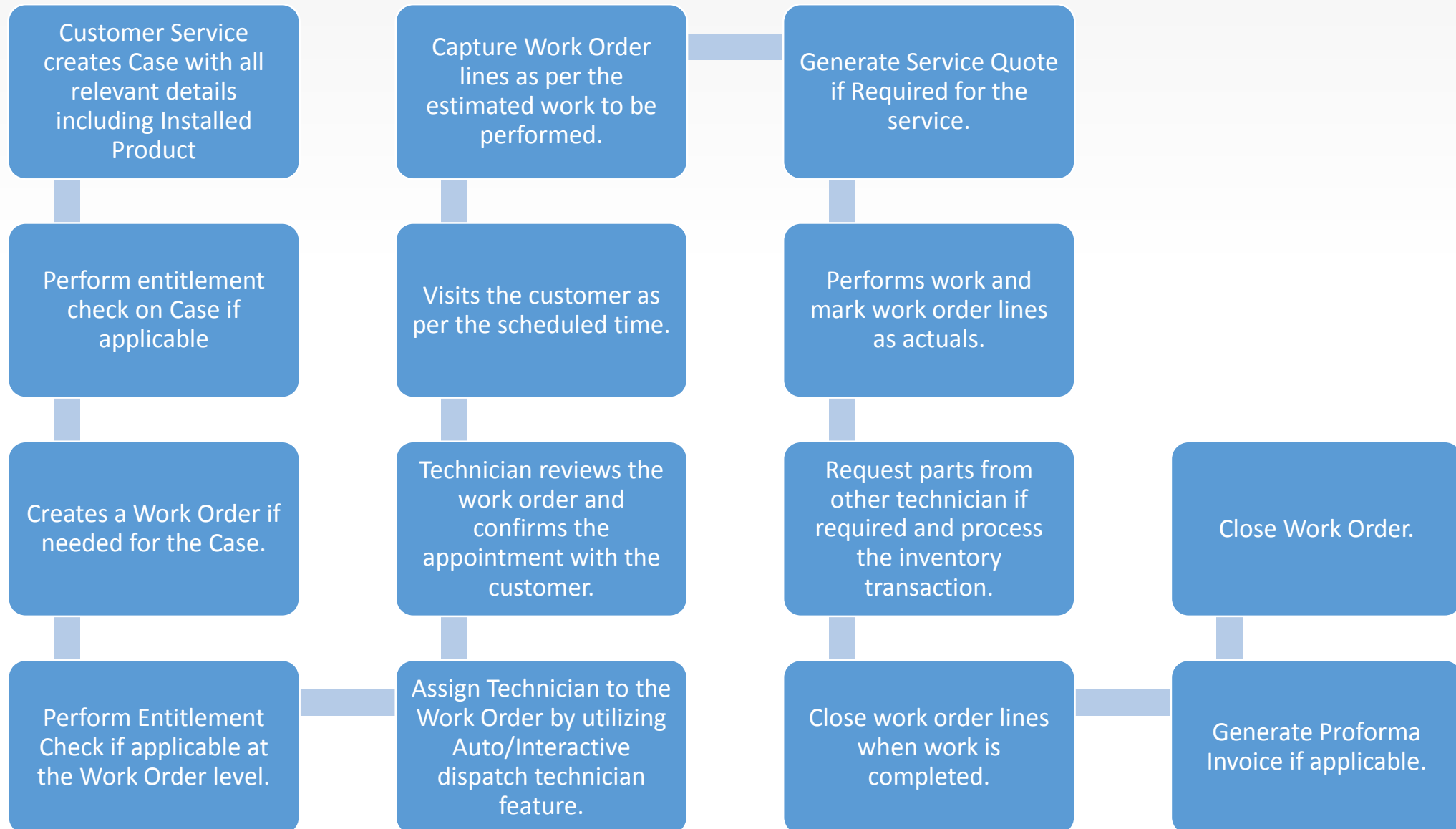
# Optima Pro – Recommended Process Flow

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1. Define the desired system configuration in Optima Pro Configuration page.
2. Add Accounts, Contacts, Locations, Installed Products in the system (if not already there).
3. Define product warranties on Installed products based on warranty terms.
4. Define service contracts for accounts by adding all applicable terms, coverage and pricing policies.
5. Install and configure PostObject Pro for easy creation of records by utilizing the auto copy feature.
6. Install and configure TimeSlate Pro for seamless scheduling and event/task/campaign management.
7. Define CTI, Live Agent or Email-To-Case setup as applicable for your organization to open a channel with the customers for reporting on incidents.

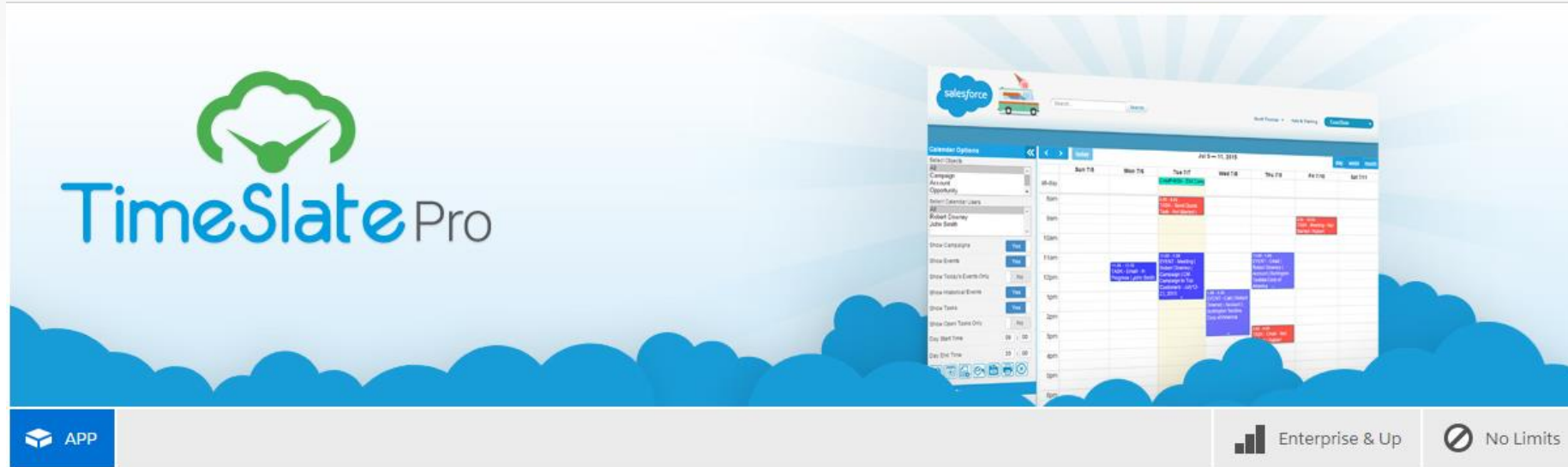
Once this initial setup is in place the next set of flow starts when a customer calls/emails/walks-in to report an incident which requires a Case as per the organizations process. The following flow is best suited from this point:

# Optima Pro – Recommended Process Flow



# Complimenting Appexchange Utilities for Optima Pro

# TimeSlate Pro



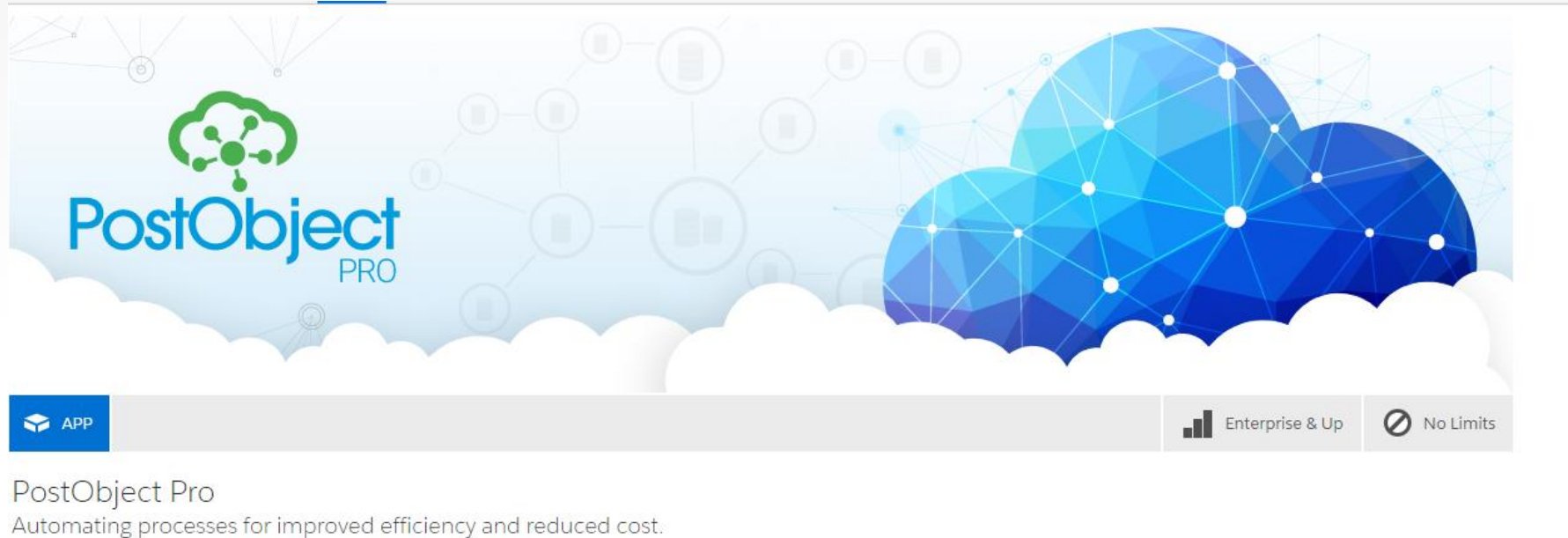
## TimeSlate Pro

A comprehensive Calendar for Sales, Service and Marketing organizations.

- TimeSlate Pro is an easy-to-use, drag & drop Calendar which enables you to create calendars using data from any Salesforce object, standard as well as custom.
- It is feature rich, flexible and optimized for mobile devices/Salesforce1.

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000DgOINEA3>

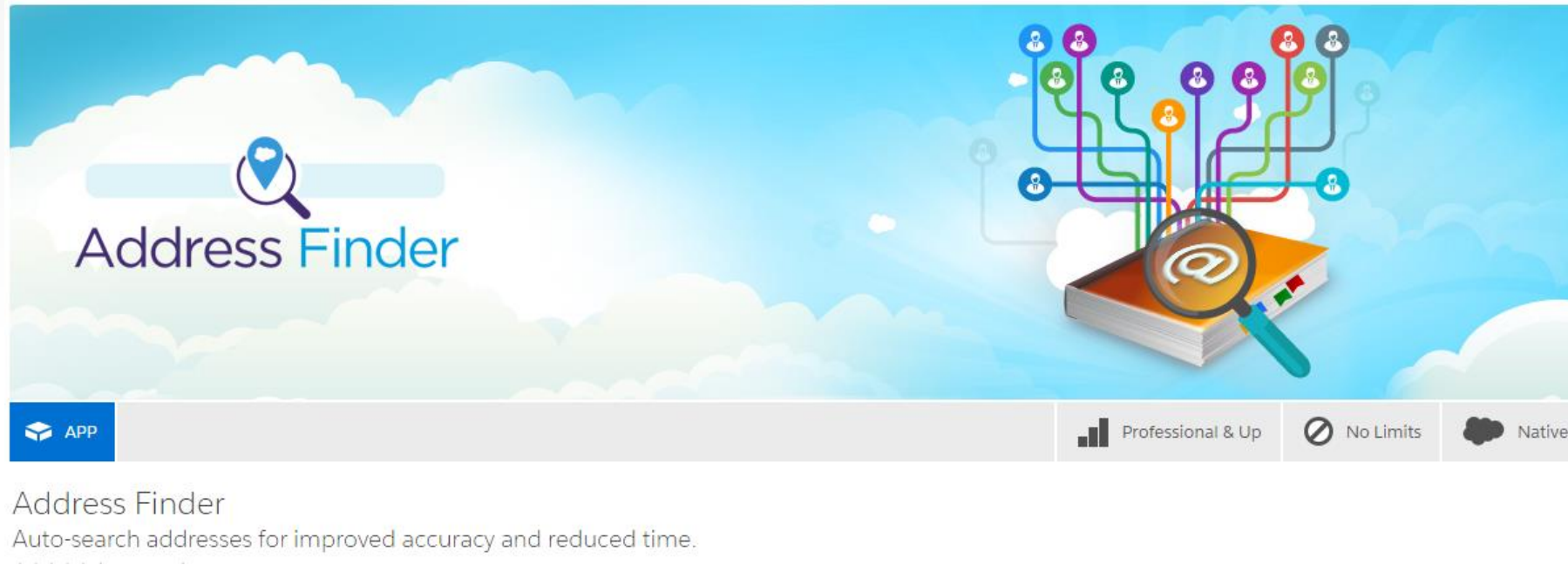
# PostObject Pro



- PostObject Pro empowers users to create a new object record from the source object and automatically copies all the values from the source object to target object as per specified mapping without need for custom code or automation from Administrators.

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# Address Finder



- Address Finder is your one stop solution for all address management woes in your Salesforce org.
- Address Finder helps you find, record and validate the addresses of your accounts, contacts or any other standard or custom objects easily.

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000CWH3UEAX>



**THANK YOU**