



# Service Logistics

Service Logistics is a component of the OneOffice Service Management system and functions closely with Service Call Management. It provides facilities to issue parts against a service call, to raise call-based stock requisitions and to suggest any parts that may require replenishment.

## Key Features at a Glance

- Manage parts used on field service calls
- Track 'swap-outs' and 'loans parts'
- Hold stock against and employee and identify replenishment requirements
- Creating a stock requisition can create a follow-on service action which must be completed for the call to be closed

## Benefits

- Ensure that stock held in the field is effectively managed to maximise customer service and to avoid excessive stock holding
- Ensure that parts used during a call are tracked and billed as appropriate

## Introduction

Parts used on Service Calls may be stockable products or stockable assemblies. Service Logistics incorporates the stock tracking facilities available via OneOffice Stock Control. The parts issued may be serial numbered or batched and the location they are issued from may have bins, thereby allowing unserviceable items to be held separately. The cost of parts used comes from the stock records whilst the product file provides a default for the price.

## Swap-Outs and Loans

Various facilities exist to cater for handling different swap-out permutations. Parts

may be replaced, with the selling price of parts issued defaulting from the product file. Parts may be exchanged, with selling prices set up via deal codes in OneOffice Sales Order Processing and enabled via Logistics systems parameters.

OneOffice Service Logistics can also record a part loaned to a customer and a part removed from the customer site. Stock issued as the loan is notionally held in a default loan location.

The loan or removal can subsequently be considered for replacement or exchange. Clearing the part simply returns it to the rightful owner. Unless the loan or removal

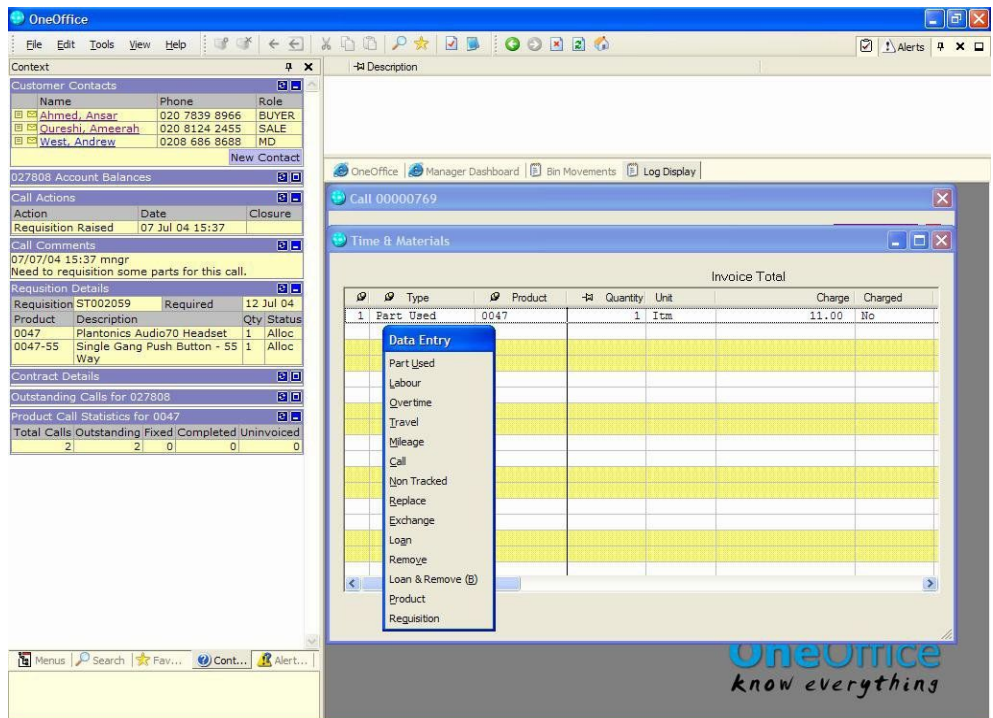


Figure 1. Using Service Logistics, Time expended and Materials consumed can be logged against each call record. In this example Active Intelligence™ is being used to display additional information about the customer and the call.



is cleared it is not possible to complete the call thus ensuring identification of parts on loan.

A stockable product or assembly may be associated with a Time and Materials action via OneOffice Product Maintenance covering the options for swap-outs and loaners. This acts as a default for the product when selected in OneOffice Service Call Management. If the stockable product or assembly has no T&M action against it, it is treated as a part used for the call.

If differences in the stock value occur, due to an issued part not having the same cost as a part being received, variances can be posted to a specified account.

## Parts Lists and Replenishment

Stock requirements may be held on parts lists, which are lists of stockable products and assemblies from the product file.

When a parts list is attached to an employee, this product list, together with associated quantities, becomes a requirement of that employee's stock location. Any shortfall in this location can then lead to a stock transfer requisition.

OneOffice Service Logistics checks that the free stock at employee locations satisfies the parts quantities specified on parts lists for each available employee. The same process may also be used to ensure that parts are listed if their stock level at a specific location has fallen below its reorder level.

The screenshot shows the OneOffice software interface. On the left is a 'Favourites' sidebar with folders for Customer Service, Marketing, Reports, Forecasting, Purchasing, Warehouse, Enquiries, Finance, and Service/Repairs. The main window displays a 'Suggested Requisitions' dialog box with a table of parts. The table has columns for Part, Description, Quantity Required, Quantity Available, and Source. The data is as follows:

Part	Description	Quantity Required	Quantity Available	Source
00221DVD	Cisco Aironet 350 Inline Bridge	4	1369	01
0047	Polycomfort 30/33 System Element	5	5074	01
0047-25	Cisco Switch	4	1631	01
BLOCK-COMP-SH	Block Compensator Sheaves	20	120	01
CR/CABLE	Hi Stress Steel Cable	35	190	01
DECT710	DECT 710 Mobile Phone Unit	20	130	01
FAR8-029	Hazard Tape	4	1471	01
HOIST-GEARBOX	Hoist Gearbox	2	295	01
HOIST-MOTOR	Server Switch Motor	6	1764	01
PENDANT-CABLE	Pendant Cable	9	0	01

At the bottom of the dialog box are buttons for 'Process', 'Amend', 'Insert', 'More', and 'Exit'. The OneOffice logo and tagline 'know everything' are visible in the bottom right corner of the software window.

Figure 2. The replenishment of engineers stock is straightforward to manage using OneOffice Service Logistics.



Each product requiring replenishment for a location is listed. Lines may be manually selected or deselected for processing. Processing generated requisitions for the marked lines. It is also possible to manually add products to the list which are required at a particular stock location and bin (if appropriate).

### Requisitions

During service call progression, requisitions may be created for the address of the employee on the call, the service address, the contract or customer address on the call, a new address or no address at all.

When creating a requisition a service action may be initiated for the service call,

which may be closed automatically on confirming the issue of the requisition.

Service calls may not be completed whilst actions are outstanding.

### Reports

Parts Used, Returned, Loaned and Removed may all be reported on, giving details of which service call and (where relevant) action they were used on. Differing criteria include specifying the relevant stock location (where relevant).

All outstanding requisitions may also be reported on.

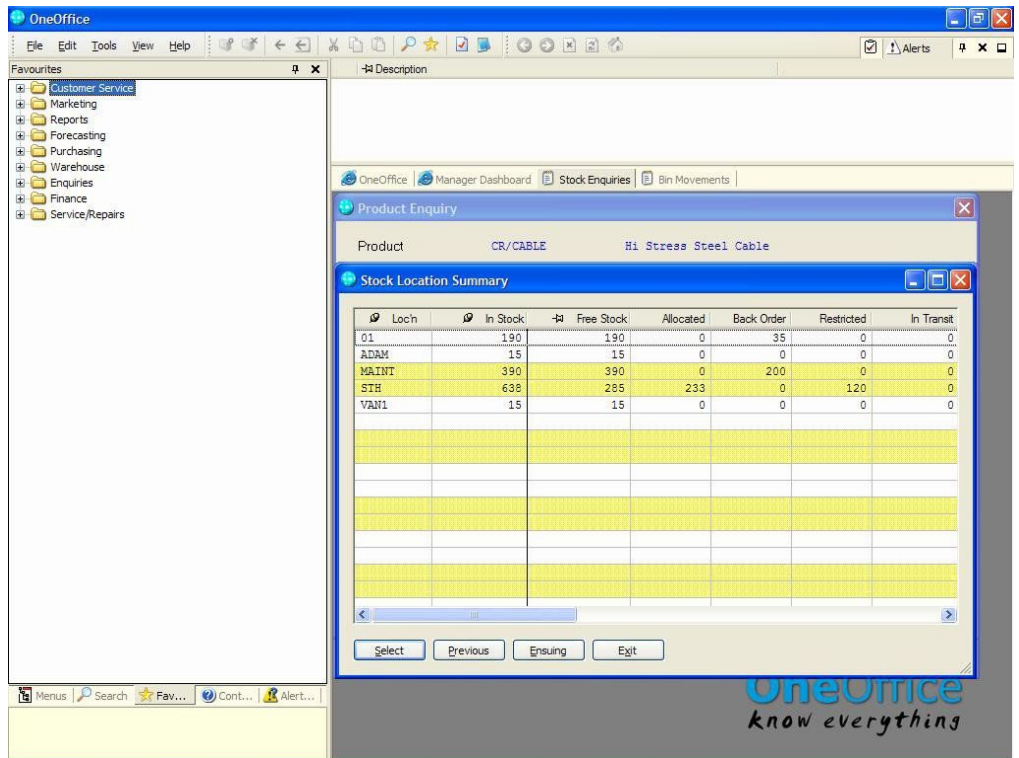


Figure 3. Availability of stock across multiple engineers is straightforward to establish.



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