PRODUCTIVITY TOOLS

FOR INFOR SERVICE MANAGEMENT

Save time, boost profitability

Tedious, repetitive tasks can be frustrating. On the flip side, the right tools help you streamline workflows, reducing steps, and speeding processes. As long-standing experts in field service, we know that your service operation is especially vulnerable to complexities. Our practical, add-on tools enhance Infor Service Management, making it work harder, so you don't have to.

NEW

SURVEY / NOTIFICATION EMAILS

Enhance the customer experience and capture feedback using the automated Survey utility. User configurable surveys can be emailed based on Incident, SRO, or other document status conditions.

NEW

QUICK SHOP LABOR ENTRY

Improve productivity and labor accuracy by using a labor entry station and barcode reader* to perform quick clock on/off jobs for resources that work in service and repair centers.

* browser based device/workstation and barcode reader not included

"The productivity tools take ISM to a whole new level. We use the import/export tool regularly to quickly load data/configuration into our system--saving us days of work."

Susan Miller, Northwest Pump

CUSTOM ACTIONS

Customize the <right-click> Action menu on any form to allow users to quickly move to a desired action—such as open a new form, open a shared folder to access documents, or even jump to a web page. This reduces the number of clicks to get the job done.

AUTO-RUN FORMS

Setup forms based on Groups or Users to AutoRun when the user logs in. This promotes higher productivity for the user and requires less maintenance by the the administrator.

BACKGROUND TASK & EMAILING

Run reports or supported processes in the Background and *automatically* email the results to an end user or external party. Just specify the report/process, time to send, and recipient's email.

EXPORT & EMAIL DATA

Working in conjunction with the Background Task & Emailing feature, data can be exported to an Excel-formatted document (.xlsx, .csv, etc...) and be emailed to an end user or external party. This is a great tool for recurring data requests.

ENHANCED CUSTOMER DOCUMENT PROFILE EMAILING

Enhance the message and document attachment when emailing Order or Contract Invoice or Quotes from within Infor Service Management.

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TRANSFORMING THE BUSINESS OF SERVICE

PRODUCTIVITY TOOLS

ENHANCING INFOR SERVICE MANAGEMENT

CRITICAL NUMBER DASHBOARDS & TREND ANALYSIS
Organize Critical Numbers into personalized collections (Dashboards) so you can quickly and easily access the Critical Numbers used most often. The output can also be used for trend analysis of data snapshots taken over an extended period.

PRO-RATED CRITICAL NUMBERS
Most critical numbers and KPIs in ISM are dynamic and employ an element of time, but the standard Critical Number functionality does not take variability into account. This feature allows Critical Numbers to be "pro-rated" for any moment in time to accurately fall within the Goal and Alert values, so you get a more accurate comparison of week over week or month over month.

EXPIRED SKILLS & CERTIFICATIONS
Keep track of certificate expirations so you can be sure only certified technicians are assigned to work orders.

IMPORT / EXPORT SUITE
Simplify the process to import or export data into the system, leveraging Excel templates to help you align fields and set parameters for each field. Save formats as templates for future use, helping automate the process. Use Excel templates to export data, as an attachment or an embedded table.

PARTNER / DEPARTMENT ANALYSIS
Analyze ISM Partner (resource) activity with transactional detail by individual, Department, Work Code, and SRO Type in a single form. Easily export this data to Excel for further analysis or formatting.

PROCESS FLOWS
Graphical user interface depicting process flows. Helpful as a training aid or as a daily workflow tool, providing shortcuts to the desired task you want to perform. Helps users stay focused on "next steps" and optimizing the use of their time.

RECORD CAP OVERRIDE
Enhance system performance and stop runaway queries. Quickly set how many records to display for searches according to each User, Group, or Form, eliminating the need to reset the cap with each log-in.

ENHANCED ADMIN FORMS
Simplify the job of the administrator by improving visibility with the reformatted forms tool that reflects Background Task Queue/History and a consolidated view showing Forms permissions by User & Group.

UNIT RENAME UTILITY
Allows you to make a unit name change once and have it reflected throughout the system. An easy way to correct an error while preserving the historical context of the item being renamed.

About us
For over 30 years we have been helping companies that sell and service high value equipment to enhance their operations through technology and proven business insights. Whether you need enterprise-wide solutions or specialized tools to enhance productivity, we deliver no-surprise deployments and high-impact results.

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