



Customer
Service
Delivery
Platform
Corporation



service relationship management delivered

Software
and
Solutions
for the
Service
Delivery
Lifecycle





ON-DEMAND WORKFLOWS

CSDP's On-Demand Work Flow solution allows you to make changes 'on the fly' and instantly respond to business and environmental changes as they happen.



UNIFIED VIEW

Rather than logging into multiple systems, CSDP's solutions integrate with your existing legacy or enterprise systems, in addition to EDI, Web, and device-based services and provide a single, unified view of customers and service operations.



FULLY TAILORED & SERVICES-LED

Instead of trying to force fit out-of-the-box solutions, our flexible software is tailored to your individual business requirements with our unique services-led approach.

www.csdpcorp.com

Depot Repair Software

CSDP's Service Relationship Management® or SRM™'s Depot Repair software offers a complete service solution for implementing and supporting a refurbishment or reclamation center. It provides clear visibility and control on the repair process. With a clear view of the stocking levels of materials, your depot repair center gains a competitive advantage. It is barcode enabled for easy tracking. You can even use the Depot Repair software module as an inverse-Dispatch application where the machines travel to the technician.

Service industry companies know that it's mission-critical to improve operational efficiencies and reduce costs in their depot repair centers, while promoting superior customer satisfaction. CSDP's SRM Depot Repair software offers a complete service solution for implementing and supporting a refurbishment or reclamation center.

Tightly coupled with the Inventory module, SRM's Depot Repair software provides clear visibility and control on stocking levels and locations, including stocking levels at individual depot repair stations. It can even signal reorder points and initiate the order at any configured stock level.





Robust RMA & Warranty Management

Manage and improve your margins! The Depot Repair software provides strong functionality for managing Return Material Authorizations (RMAs) through the entire lifecycle of the RMA. It reduces any guesswork and easily allows employees to verify warranty validity.

With an integrated warranty entitlement module, you will see your exact warranty status. Knowing that the repair is under-contract, under-warranty, or out-of-coverage, you'll be able to take appropriate action. As well, it presents the opportunity to up-sell contracts during the initial call for service.

Depot Repair software product allows you to enforce strict labor (and cost) reporting concerning all actions and materials required to make the repair. Clients can choose to have these actions update the Knowledge Database.

The Depot Repair module addresses all a client's needs for implementing a refurbishment or reclamation center. Tightly coupled with the Inventory module, clients have full vision and control on stocking levels and locations, including stocking levels at individual repair stations. Clients can manage Return Material Authorizations (RMAs) through the entire life cycle of the RMA. Clients can use the Third Party Materials tracking logic to know when component parts are still under OEM warranty and collect the historical data to provide Vendor scorecards.

This module can be used to create a new delivery model where there is a true cost savings and a potential revenue increase for services offered. CSDP consulting services can go into further detail and assist in the setup of new delivery models and services to reduce costs, improve revenue streams, and improve your customer satisfaction and customer loyalty.





Repair Management

Repair Holds: Ability to pause the repair workflow based on predefined conditions or as needed.

Any repair can be deferred or held for any reason driven by a user-defined table that stores status and reason codes. Automatic hold is now limited to parts ordered or costs, credit limits, or needed credit card verification. Invoice hold is automatic for pending quotes, but the repair is still performed.

Repair Vendor Profiling: Ability to manage repair vendor profile information.

Vendor profiles are kept just as customer, employee and stocking location are. The vendor profile also carries data including vendor part number, vendor standard cost (could be by quantity), vendor standard repair cost, vendor hourly rates, vendor flat rates, etc. The vendor profile may also contain warranty period for new out-of-box and repaired parts. This may be at a high level of the vendor only or at the detail level of the vendor in combination with the part.

Preferred vendor logic is not very robust and is really just by part a primary vendor and then the alternate vendors. We believe the Work Flow Tool (user-definable business rules) is able to handle this without any new development, but it may require some type of enhancement to the application. This type of enhancement would be a routine that will be easily separated from the base application so would not disrupt any kind of upgrades to the application.

Repair Vendor Selection: Ability to suggest/select repair vendors based on profile and service needs.

Preferred vendor logic is not very robust and is really just by part a primary vendor and then the alternate vendors. We think that the Work Flow Tool (user-definable business rules) may be able to handle this without any new development, but it may require some type of enhancement to the application. This type of enhancement would be a routine that will be easily separated from the base application so would not disrupt any kind of upgrades to the application. The system does allow for the viewing of all eligible vendors for a given situation and will display the vendor data elements that do help to make the manual decision including pricing, turnaround times, vendor rating, etc.

The vendor may be chosen from the suggestion view which is integrated into the purchasing and return to vendor processes.



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Repair PO: Ability to transact a purchase/service order for a repair vendor against an external system. (The application does have a full requisition to purchase order system that could be used as the system of choice for these types of transactions. Larger companies normally do not wish for the system to be the system of record for these processes but to more interface to legacy systems that already perform these functions. There are standard interfaces at every point in the process including requisition creation, requisition approval, conversion to purchase order, receipt of the product, receipt and receipt of the invoice. These same standard interfaces have also worked with vendor external systems so that both systems are in perfect sync at every step.)

Repair Vendor Swap: Ability to receive equivalent swaps from repair vendors in exchange for the original part sent.

Part swap: The system can be set up to allow part number swaps, but does some validations to make sure that the part that is shipped is a substitute for the part that is originally ordered. The system can also handle situations where a vendor adds different parts to the purchase order or repair order. This must be setup in the databases and has exception type logic, which may also queue or message the swap or addition (via many means) to a department or person who may be required to approve the transaction.

Serial swap: Serial swaps are supported. The system also has features that allow entry of serial number ranges, format, masks, etc. to add a layer of security to the process if desired.

Credit swap: The system allows for both manual credit against a vendor and automated credits for the return to vendor process. The credit is captured and usually requires an interface to an accounting system. This interface is a standard in the application, but may need some specific customization dependent on the upstream system's requirements.

Repair Management Features

Ability to support Repair and Return flow: Includes warranty/contract conditions for turnaround, pricing, customer obligations, quantity limits, priority, etc. This includes the ability to script user-definable business rules as well as bar-coding and label printing invoked from menu or from Service Call.

Ability to support Advance Exchange flow: Includes warranty/contract conditions for turnaround, pricing, customer obligations, quantity limits, priority, etc. This includes the ability to script user-definable business rules, as well as bar-coding and label printing. It is invoked from menu or from Service Call.



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Ability to support Return Only flow: Includes warranty/contract conditions for turnaround, pricing, customer obligations, quantity limits, priority, etc. This includes the ability to script user-definable business rules as well as bar-coding and label printing. This is also invoked from menu or from Service Call. In addition, this process allows for scrapping with user-defined rules for any special handling in the scrapping process and reuse of remanufactured items. The part or product can be returned to stock with user-definable costing rules.

Ability to support On-Site Repair and Technical Services: Can automatically invoke replenishment logic (many options) and trigger repairable parts to be handled like a Return Only as the Advanced Exchange was the Technician replacement of bad part on site.

Workflow and Activity Management: Contract/Warranty conditions, Entitlement conditions, user-definable business rules, and based on Part Master definition (e.g. repairable, serialized, disposal conditions, and other fields meant to drive activities and flow of a particular part or product).

Support forced routing of tasks and subtasks within a workflow: Both for field and Depot repair work. Also supports return to Vendor functionality for warranty or outsourcing. Many types of assignment logic such as skill, availability parts on truck (or in Depot), distance, etc. Also user business rules can be used.

Technician Profiling: There is an education module that can also create classes, courses, submitting for certificates (for security and training levels). This can feed the employee skill set upon passing a class or set of classes.) All times are captured (response, arrival, fix, etc.). Reports and Inquiries to show actuals/actuals vs. expected.)

Technician Workbench: Dashboard access for technician visibility and task management. Support for in-house and on-site technicians. There may be many tasks for a given problem with each having independence for assignment, dates, times, and task definitions. This includes smart products which can send interface records directly to the application for automatic creating and assigning service requests. Every activity is captured and kept in a detailed audit trail by task and a higher level audit trail by service request. This can be done with RFI device/Cell Phone/Blackberry/RIMM or other WAP enabled technologies as well as an entry into screens. Parts orders can be tied to service requests and can trigger transfers with higher priorities. Also may be purchase orders for direct shipment or a run to a hardware store by the tech. Supports truck stock, shared lockers, and normal stocking locations including customers with spare parts on hand.



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Supporting Installed Base

Supports parts substitution: Can also trigger a substitute such as an 80 gig hard drive substituted for a 40 gig hard drive, so that if desired, when the 40 gig hard drive is available, it can flag a service request to substitute again to gain back the more valuable 80 gig hard drive.

Visibility and Measurement: Ability to track and provide visibility to transactions including end user returns and activities performed by in-house, on-site and third party service providers. Ability to monitor progress, view backlogs and capture milestones.

Status and Milestones are tracked to any level that UPS would like. Status codes can be as granular as desired, as they are user-defined. Part order or repairs are automated and stamp the service request (or depot repair) when the part order is created or the part is sent to a vendor. Every cost for a given repair is captured, including travel expenses, labor costs, part costs, shipping costs, and third party costs.

Entitlement may be invoked for any level. User-definable levels are rollup logic will determine at which level the service request is used. Part transactions all have detailed audit trails at both the order and line item levels. Service request or RMA (AEX, Repair and Return, outbound orders) are all monitored with alerts and monitors providing emails (including customers), text messages, updates to queues, update to activities when user-defined rules are triggered for conditions such as late or near late situations. Multiple monitor levels are allowed. (E.g. 15 minutes late may be different than 2 hours late, etc.)

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This provides visibility to **exceptions** regarding repair transactions and transportation. (Part transactions all have detailed audit trails at both the order and line item levels. This captures start times, completion times and cost for repair/return activities and technical services. There are many base reports for this. Report writer capabilities are also available for user-definable reports for both one time and repeat reports/inquiries.





This uses contractual terms and conditions obligations for **actual vs. expected results** for turnaround times for in-house and on-site repair activities, taking concurrent activities into account. Also includes historic information to use to set new entitlement, expectations, and vendor requirements. Trends are also included for both third parties and in-house technicians for resetting expected results. This also includes contractual obligations as a driver for number of minutes, hours, days, etc.





SRM Depot Repair Features:

- Depot repair management analytics & reporting
- Warranty tracking
- Historical tracking of all work orders
- Automatic stock reordering
- Robust Return Materials Authorization (RMA) management
- Database agnostic
- Barcode enabled for ease of tracking
- Cost variables to automatically determine whether to repair or replace
- Allows for bench technician workload balancing
- Highly customizable options including Contracts & Billing, Knowledge Management, Customer Service, Warranty Entitlement, Dispatch, Inventory and more
- Tracking the removed part from customer site to receipt at the repair depot
- Processing of carry-on items by Customer or Service Engineer
- Recording and reporting on labor time and cost, as well as material cost and total cost for repair activities.
- Keeping track of customer owned versus company owned items
- Shipping of customer owned parts after repair
- Billing for Depot Repair Services
- Repair Activity Reporting
- Exception report on overdue items
- Warranty tracking and reporting
- History of all customer records
- Highly competitive pricing

SRM Depot Repair Benefits:

- Boost profitability with in-house repair automation
- Higher productivity for workforce and equipment
- Seamless integration
- Streamlined repair processes reduces costs
- Increase customer satisfaction
- Intelligent RMA management maximizes performance
- Easy warranty validation
- One of the highest ROIs in the industry





About CSDP

CSDP is a services-led software company with solutions that can automate the entire post-sale service delivery and customer service process. We offer:

- An On-Demand Work Flow solution allowing you to make changes 'on the fly' and instantly respond to business and environmental changes as they happen
- Flexible solutions that are tailored to your unique business requirements, instead of trying to force fit out-of-the-box solutions
- A single, unified view of all customer and service delivery operations
- Implementation in weeks - not months

Our clients have realized improved customer satisfaction by up to 15 points, increases in service profitability exceeding 10%, decreased average cost per repair of 50% and increases in first call resolution greater than 20%. We not only help our clients drive down operating and service delivery costs, but enable them to drive up customer satisfaction and increase service revenue and market share.

The Service Relationship Management (SRM) product suite addresses the complete end-to-end service delivery lifecycle including Contact Center, Dispatch/Mobile, Depot Repair, Inventory Control & Management, Knowledge Management, Marketing and Quote Generation, Warranty Entitlement, Training, Contracts/Billing, Reports, Scheduling, and Time Tracking. Our software is fully customized to fit your company's needs and easily integrates with your existing infrastructure so that it implements quickly and begins generating ROI immediately.

CSDP's SRM software solution has been delivered to some of the world's foremost Fortune 500 companies to include IBM, Xerox, Fujitsu, Whirlpool, Rockwell and PSE&G to name a few.

To learn more about CSDP, visit our [website](#), follow our [blog](#) and join the [Service Relationship Management Group](#) on [LinkedIn](#).

Contact us at info@csdpcorp.com.

For more information on any of our products or services please visit us on the Web at: www.csdpcorp.com or email us at: info@csdpcorp.com



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