

The DDMS Project Report

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----- Service Automation Software Goes Graphical! -----

We expect to ship version 7 of our eNsite products in the fourth quarter of 2003. The version 7 releases will include an enhanced, graphical version of our service automation module, which offers powerful tools for managing the sales and service of office machines. The graphical interface brings new ease and efficiency to the core service automation functions. (Some functions are still text-based in version 7; we will convert these functions to graphical in future versions.)

These graphical applications will enable office equipment dealers to work more efficiently than ever before:

Work in fewer screens: we carefully engineered each window and dialog box to put all the information you need at your fingertips. Applications like contract types and the call monitor required multiple screens in the text-based software. In the graphical software, they each occupy a single window. Tabs replace the additional screens, letting you view or change all the relevant information with a click of the mouse.

Changing records is also much faster in graphical. With the text-based software, you had to tab to the field you needed, which often involves a number of keystrokes. With graphical, you simply click the field you want.

----- What Will Be Available in Graphical? -----

Version 7 will bring the ease and efficiency of the graphical interface to almost all of the service automation applications. You will be able to accomplish the following tasks using new graphical tools:

- Create and maintain machine-specific databases, including contracts, meters, machines, and service techs, as well as general databases such as customers, vendors, salespeople and inventory.
- Process service workorders: create workorders, edit, close, and bill them.
- Monitor and dispatch service calls, and analyze the performance of your service techs.
- Sell machines, contracts, parts, and supplies.
- Set service automation parameters: work with contract types, call codes, territories, tech qualifications, and more.

Version 7 also features tighter integration between the service automation module and the rest of the system. The customer and inventory windows, for example, both include new tabs for service automation.

The Customer window includes a Machines tab that displays service information for each customer.

The Item window includes a View Machines feature that displays critical parts for each model. This window also includes a feature for easily transferring machine inventory between locations.

Only two of the basic service automation applications are not yet available in graphical:

- Contract and meter billing
- Reports

Graphical versions of these applications are in development and will be included in a future release.

----- Logging and Dispatching Calls -----

Logging and dispatching service calls are far easier with the new graphical interface. The graphical call logging application puts much more information at your fingertips: look up a customer's call history, including the complete text of each call, without leaving the call logging application. Tabs make it easy to move back and forth between global customer and machine information, the machine's service history, and the text of the call.

The call monitor now lets you view a call's text simply by clicking it. Without leaving the monitor, you can see the details for the selected call. You can also change the way calls are sorted with a single click — sort by priority, territory, or customer, for example, just by clicking the appropriate column heading.

Like the other graphical applications, the call monitor gives you fast access to relevant information from throughout the system. View details about the machine, the model, critical parts, the customer and their call history, and more, all without leaving the call monitor.

The graphical call monitor also makes it easier to manage your techs' schedules. See a tech's calls at a glance and rearrange priorities by simply dragging and dropping the calls. Reassigning calls is as simple as dragging a call from one tech's name to another. We have also streamlined the dispatching process, making it much simpler and faster than before.

----- New Accessory Management Feature -----

A new application in the graphical service automation module helps you manage accessories. You can access Machine Accessories from the Machine Detail database and from order entry.

The Machine Accessories window makes it easy to sell or lease machines with the accessories the customer needs. Suppose you're selling a copier with a document feeder, a cabinet, and a finisher. You specify the model numbers for the copier and the three

accessories, and let the system search. It will list exact matches first: any copiers with all three accessories that are on-hand. It will also list copiers that have some but not all of the accessories you specified, and list the individual accessories available. You can drag and drop machines and accessories to assemble the copier you need.

You also have the option of generating setup or delivery workorders for the machine, with all the accessories you specified.

In addition, you can view the history of any accessory part at a glance; this feature makes it easy to quickly spot defective parts.

----- Enhanced Trade-In Features -----

We have enhanced the trade-in features in the Machine Detail database; it's now easier to manage trade-ins and the parts you use from them. You can set up dispositions and assign them to each trade-in you accept. Dispositions are user-defined categories that help you organize trade-ins, such as "to be inspected" or "for parts only". These dispositions are part of the machine's database record, and appear when you work with the machine. They can aid you when printing reports – for example, you can limit a report to items with a disposition of "for parts only" and see which useful parts have been removed from these machines, and which parts still remain.

----- Learn to Use the New Software at the ECI² Users Conference -----

The new graphical service automation module represents a significant advance over the existing text-based applications. Dealers must receive training on this powerful new software prior to implementation. The best place to receive this training will be this fall at the ECI² Direction 2003 Users Conference.

The conference will be held in Dallas, TX, on September 18–20, 2003. It features an entire day of in-depth training on the new service automation software.. This training meets the requirements for authorization on the graphical programs. Plus, if you attend the conference, your company will be one the first to receive the new graphical software when we release it.

We will mail conference brochures to all DDMS customers in a few weeks. We are also building a conference Web site to offer you the convenience of registering online. We'll notify you by email when the conference brochures go into the mail and when the new Web site is live.

Note: The service automation sessions at the ECI² Direction 2003 Users Conference are the only classroom training on the new graphical applications scheduled for this year. However, we will be offering virtual classes on the service automation software later in the year. These virtual classes will allow dealers who are not able to attend the conference to meet the training requirements for authorization.

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