

WHITE PAPER



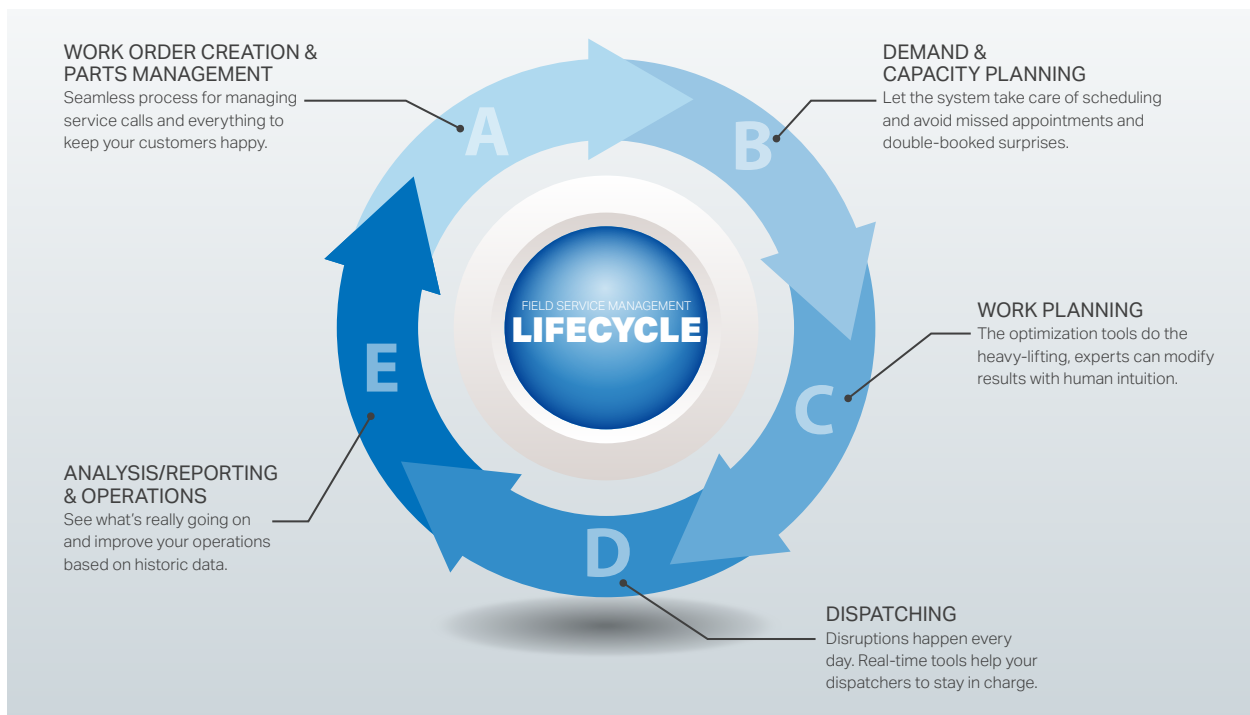
# Odoo Open ERP: An Integrated Solution for Field Service Management



Whether you are managing field services for repair and maintenance or for services, delivery and inspections, an integrated enterprise solution will help you to reduce costs while increasing customer satisfaction, visibility and operational efficiency.

Effective Field Service Management (FSM) solutions are tightly integrated with other business systems such as ERP, CRM, Inventory Management, and AVL Telematics.

That's why Open Source Integrators (OSI) leverages Odoo, the most extensive open source platform for integrating business systems with all aspects of the field service management life cycle:





## WORK ORDER CREATION AND PARTS MANAGEMENT

Odoo provides a seamless process for managing service calls and responding to customers' needs.

- + Open ERP (used by two million users) provides CRM and work order creation tools to manage delivery, service, inspection, and maintenance work.
- + Work orders are associated with tasks and parts/equipment needed to do the job.
- + Parts inventory is managed automatically so the right parts are on the truck when it matters most.

## DEMAND AND CAPACITY PLANNING

Let the system take care of scheduling and avoid missed appointments and double-booked surprises.

- + Demand management based on historic information and work requests such as service calls from customers, delivery requests, or maintenance scheduling systems.
- + Capacity management based on available resources and geography.
- + Includes field staff schedules and equipment/parts inventory.

## WORK PLANNING

The optimization tools do the heavy lifting, experts can modify results with human intuition.

- + Automated, optimized assignment of work to resources, allowing for manual overrides by your routing experts.
- + Scheduling of service calls, deliveries, and maintenance work.
- + Parts and equipment planning and purchasing, third-party contractor enablement.

## DISPATCHING

Disruptions happen every day. Real-time tools help your dispatchers to remain in charge.

- + Ad-hoc work and priority call handling.
- + Bi-directional communication of work and delivery orders between dispatcher and field staff.
- + Simple or automated location tracking and dynamic scheduling of field staff.
- + Real-time updates via mobile devices.
- + Documentation readiness gives technicians mobile access to all important documents.

## ANALYSIS, REPORTING, AND OPERATIONS

See what's really going on and improve your operations based on historic data.

- + Review KPIs such as on-time performance of service calls.
- + Get reports on parts and equipment used.
- + Operation Management (Equipment Maintenance, Fleet Management, etc.).

## Field Service Experts

USA Odoo experts have supported integrated field service solutions for diverse companies such as Sempra Energy, Schindler Elevator, FedEx, Gallo Winery, United Site Services, and Waste Management. As well as multiple government entities, the largest fleets in the US, and a few dozen small initiatives. We understand the complexity and cultural sensitivity that accompanies field service process optimization.

USA Odoo will leverage your existing systems, including any routing or tracking tools and propose alternative solutions where desired. We can partner with all major AVL providers and will take the time to understand your specific field service needs, considering carefully every organization specific workflows before engaging in process optimization.

## About USA Odoo

A division of Open Source Integrators, USA Odoo was created to provide Odoo-powered open source accounting, CRM, e-commerce platform, and logistic integration including real-time big data and business process improvements leading the way. USA Odoo provides decades of experience in Open ERP spanning a wide range of industries, including the Service Sector, Construction and Utilities, Manufacturing, Direct to Consumer, and Engineering-centric. From small, independent entrepreneurs with a big idea to national infrastructure efforts, you can rely on the scalable ERP expertise from USA Odoo around the clock.



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