



## SALESFORCE ADD-IN

### COMPLEXITY DOWN

**Successful companies understand how to optimize information systems and leverage their capabilities.**

Matrix Agility is a tool for streamlining product configuration and sales quotations. Integrated with Service Request & Repair, Matrix extends the control of the sales process by tracking item history and adding the items to service level agreements (SLA).

### PRODUCTIVITY UP

**Architected in the cloud, Matrix agility is accessible anywhere on the globe.**

From field to depot service, Matrix tracks the items associated with the customer, including entitlements, warranty period, manufacturer, serial number, configuration, description, date opened and closed, and the actionable response, with workflow alerts.

Matrix is the business continuity tool that bridges customer service and sales in a seamless customer-centric repeatable model.

It's time to stop thinking out the box...  
and throw the box away!

## ACCOUNT INVENTORY:

- Batch entry of product serial numbers, warranty information.
- Add New item with Serial number, SWO Number, Status, Defect Description, Product, Warranty Start and End Date.
- Account Inventory history tracks Warranty Status, Product, Serial number, SLA, Last Order date, vendor and Sale Price.
- Configurations can be tied to Inventory items such as PC, Printers, mobile terminals, etc.
- Account inventory is automatically added through a closed sales order or quote.

## CASES-SERVICE WORK ORDERS:

- Create service request for internal staff and external suppliers for various tasks.
- Individual service items for multiple problems on one service order.
- The ability to add case comments either by item or by case.
- The SWO shows both activity history and case history for the SWO.
- The ability to add time and materials to the case or to an individual item.
- The ability to close single items on a SWO with multiple items.
- From the SWO you can select a link to view customer contacts, customer info, email the customer.
- Add attachments to the SWO for documentation or setup.
- Schedule preventive maintenance on equipment for internal staff and external suppliers with automatic workflow alerts.
- Record serial numbers and tracking information for items in the SWO.

## SERVICE LEVEL AGREEMENTS (SLA):

- Create SLAs from customer purchased inventory.
- Create third party SLAs.
- Multiple Items can be added with warranty and other entitlement statuses with vendor/manufacturer
- Create preventative maintenance schedules.
- Add or delete items to an SLA or change status.

## SEARCH BY:

- Track requests for service through workflow alerts from origination through each contact approval to task complete
- Detail by Total Time & Material, Status, PO, Reference Tracking Numbers for 3rd party depot repair (Returning to Customer).
- Third party SLAs detail by Billing Increment value, Total Items Covered, Billing Cycle, Total SLA Value, email SLA, SLA Profitability Analysis.
- SLAs detail by Billing Increment value, Total Items Covered, Billing Cycle, Total SLA Value, email SLA, SLA Profitability Analysis including third party SLAs.

## MOBILE COMPUTING:

- Portable terminal support for bar codes, RFID tags, label printing.
- Portable terminal has a color camera built in for capturing photo of inventory asset at time of receipt or audit.
- An auto install feature is used to capture asset tag, serial number, location, photo, quality code and open text notes.
- Portable terminal supports WLAN, 3G HSDPA, GPS, WiFi and Blue tooth.