



Overview of iCube Customer1st™ 3.3

iCube Customer1st™ is a service management system software for customer care, customer and vendor returns, depot and field service, on-line self services and service contracting.

It automates the end to end global service processes between the service providers and the end customers; adds the service features; brings ease-of-use, flexibility with exception handling. It populates data to reduce data entries, cuts process redundancy; and provides a platform for internal and external users to communicate and collaborate.

The simple workflow routes service from request to resolution through the specific service processes. Each process is tracked with user and completion time stamp, internal and external communication notes and order status to provide full visibility, traceability and prevent oversight.

It can be run standalone or integrated with Sage Accpac ERP™ and Sage Pro ERP™. iCube Customer1st links ERPs through SDK; retrieves data of customers, vendors, items and inventory and posts the related order and inventory transactions to retain full compatibility.

iCube Customer1st consists of core modules and supplements. Supplements are add-on components that need to run on a core module and bring in the specific functionalities. Example of supplement is "Repair Plus" brings user-definable repair workflow to the RMA/Depot service module.

Core Modules

1. Customer Care
2. RMA / Depot service
3. Return to Vendor
4. Self Service
5. Field Service
6. Service contracting
7. CRM Link

Add-on Supplements

1. Repair+
2. Ship Link
3. Quotation
4. Quality Control
5. Point of Sales



Core Modules

1. Customer Care

Customer care processes the following services from start to end

- general services such as product features, complains and payment issues
- product registration
- product and technical support
- purchase of service items such as extended warranty, product upgrades etc.
- product returns
- field services

In the service case, Customer Care tracks the service type, the servicing product, service description, reasons for request, priority, internal and external communication, details of issues, progress, resolution, the user and time stamp for all the processes conducted in the workflow, with email to update progress, status and resolution to customers.

2. RMA / Depot services

RMA processes customers' returns of products from issuing, authorizing, servicing to shipping and invoicing for upgrades, recalls, maintenance, repair, replacement and credit refund. It supports direct customers and indirect customers that purchase from your direct customers.

It has separate workflows to handle standard and cross-shipment returns (advanced replacements that ship replacements to customers before you receive their defective products. It consists of the following processes.

1. Issue service orders
This process is to create service orders and validate the proof of purchase and warranty for each return item.
2. Approve orders
This process is to approve or reject the service orders. Auto email notification will be sent to customers with RMA numbers for the approved orders or reasons for the rejected orders.
3. Receive orders
This process is to receive items for services. Intelligence is built in to handle exceptions for receiving wrong items, items with wrong serial numbers, missing items, extra items, items with missing components or accessories.
4. Service orders
This process is to service the received items with the following options
 - Refund
 - Replace with a replacement
 - Repair the return item
 - Return to vendor for replacement or credit



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- Subcontract to another service provide to service
- 5. Pack orders
This process is to pack the serviced items for shipment.
- 6. Ship RMA orders
This process is to ship the serviced items back to customers.
- 7. Invoice RMA orders
This process is to generate invoice for the service orders.

3. Return to Vendor (RTV)

RTV manages the process of returning items to vendors for repair, replacement, upgrade or refund. To your vendors, your RTV orders are their RMA orders.

It supports return of your defects or your customers' returns. The latter case is for resellers who do not do direct services that they return the customers' items to the vendors that they purchased from for warranty services.

The returning items are validated against POs and warranty and the PO information is listed in the RTV order. The replacement items will be auto received to designated warehouse and a return PO will be generated for credit returns.

The link between the RTV items with your RMA items is multiple to multiple that allows you to combine multiple RMA items to one RTV order and items from one RMA order to multiple RTV orders.

The RTV workflow consists of the following processes

- Issue RTV
- Approve RTV
- Pack RTV
- Ship RTV
- Receive RTV

4. Self Service

Self-service is a web-based portal to allow your direct and indirect customers to do the following self-services

- Request for RMA
- Register products
- Check RMA order status
- View RMA history

Customers can view and print current and history service orders such as

- General info such as the returning items, request date, reasons to return, reported problems, service type and priority etc.



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- Status such as the current process stage, the issues, findings and resolutions.
- Communication, notes and service logs
- Shipping info including tracking no.
- Credit memo number for items returned for credit

Requesting returns is simple. Other than input the reasons, problems description, customers just need to enter the serial number for the serialized items, or the invoice number for the non-serialized items. Auto validating of proof-of-purchase and warranty status will be performed. The request will be posted to the RMA queue for service reps to approve for processing. Auto-email with RMA no. or reject reasons will be sent to customers.

For indirect customers who do not purchase directly from you, they need to do product registration before requesting returns.

5. Field Service

Field service manages services to be conducted on the field.

The centralized calendar manages technicians' schedules that can be assigned or rescheduled by service reps for new and existing orders. Each technician can view his own assignment and schedule.

The equipment and spare part list tracks the equipment and spare parts that a technician has checked out for servicing.

The field services workflow consists of the following processes

- Issue/edit order
- Approve order
- Service order
- Invoice order

6. Service Contracting

Service contracting allows the repair or the entire service processes to be subcontracted after you have approved the RMA/service orders. It supports the following options

1. Subcontract "Repair" service
This is the option that you send the customers' service items or your in-house defects to contractors for repair. After receiving the serviced items from contractors, you ship customers' items back to them.
2. Subcontract "turnkey" service
This is the option for the contractors to do the entire services, from receiving defects from your customers, servicing the defects and ship them back to customers. You will still do the issuing and approval for the service orders.



7. CRM Link

Similar to the self-service for customers, “CRM link” links Sage CRM to the RMA module for CRM users to

- Issue RMA order
- Check RMA order status
- View RMA order summary

In the Customer Care module of Sage CRM, new solution type “RMA” is created to propagate this case detail to iCube “RMA” module for further processing.

A new tag “RMA” is created in Sage CRM to display the progress and status of RMA orders. Users can select a RMA no. to view or print the RMA order with

- Background such as the return items, request date, reasons to return, reported problems, service type, priority etc.
- Status such as who did what at when for previous processes, which process it is at, the issues, findings and resolutions.
- Communication, notes and service logs
- Shipping info including tracking no.
- Credit memo no. for items returned for credit



Add-on supplements

1. Repair Plus

Repair Plus upgrades the built-in repair process of RMA/Depot service with the following enhancements.

- **Configurable repair workflow**
It creates repair workflows to fit specific repair requirements for specific product lines. Example is to add repackaging process for refurbished items.
- **Support component repair**
It validates the components of the repair item with its BOM (Bill of Materials) to make sure the proper components are to be replaced for repair.
- **Repair by item**
Other than repairing items in a service order, you can repair or rework an item from the defective pool. The repaired items can be issued to another location. The non-repairable item can be reworked again or to be scrapped.
- **Refurbish items**
It allows you to regenerate a new serial no. for the repaired item.

2. Ship Link

ShipLink integrates RMA and RTV modules with the StarShip manifest system by v-technologies that support UPS, Fedex, trucking and other carriers, for information exchange to eliminate the manual user entries.

ShipLink bridges ERP and iCube Customer1st with auto data exchange to eliminate data entry. It sends shipping information such as shipping address, shipping method and document no., to Starship for the carrier to print out shipping label for each package. In return, ShipLink retrieves the tracking number and the shipping charge and store to ERP and print in the related shipping document.

3. Quotation

Quotation adds quotation features to allow technicians to diagnose the products and to quote for the services.

Quotes can be configured with internal approval. Each quote is assigned with a unique number to associate with a service order. Quotes passing the expiration date will be obsolete. It adds the following processes after the receiving process of RMA/Depot service module.

- **Create quote**
This process is to create a quote and print or email to customers.



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- **Accept quote**

This process is to reflect customers' decision by clicking "approve" or "reject". Accepted quotes will enable the service process and rejected quote will be routed to pack function to return items back to customers with service.

4. Quality Control

QC inserts incoming QC (IQC) and final QC (FOC) before and after the service options of RMA/Depot service. It tracks user definable information and decides the actions for the service.

IQC determines the service option. Examples are

- products violating warranty rules should be chargeable
- used items should not do credit return
- sever damaged items may not worth to repair

FOC determines whether the items have passed the quality standard. Rejected items will be put back to defective queue for rework.

The user defined parameters are useful to track detail configuration such as the versions of critical components, any missing components or accessories found etc.

All user definable fields are logged per item of each RMA order and are available for analysis.

5. Point of Sales

POS simplifies the RMA/Depot service processes for Point-of-Sales environment by combining the issue, approves and receives in one process, integrating with service quote; and combining the shipping and invoice functions in the "pick up" process.

It consists of the following processes

- Create and receive items
- Quote for services(optional)
- Service item with options to repair, replace or credit
- Pack
- Pick up and invoice