

## Field Service Management

[ BENEFITS ]

**Increase business productivity**

Quickly adjust technician scheduling, change repair priority levels, and execute change orders. Coordinate regular preventive maintenance to reduce redundant visits, and easily manage complex contracts.

**Share information**

With easy and accurate access to a vast array of information, organizations can provide customers with first-class service, while ensuring the right technician is dispatched with a complete history of the customer.

**Increase customer satisfaction**

Improve customer service and reduce costs with Web-based tools that let customers resolve service issues themselves, log service requests, check repair status, monitor returns, and enter their own meter readings.

**Make quick, intelligent business decisions**

Use standard and customized reports to track detailed costs for parts and labor, monitor returns and repairs for parts, and analyze technician workload and deployment.

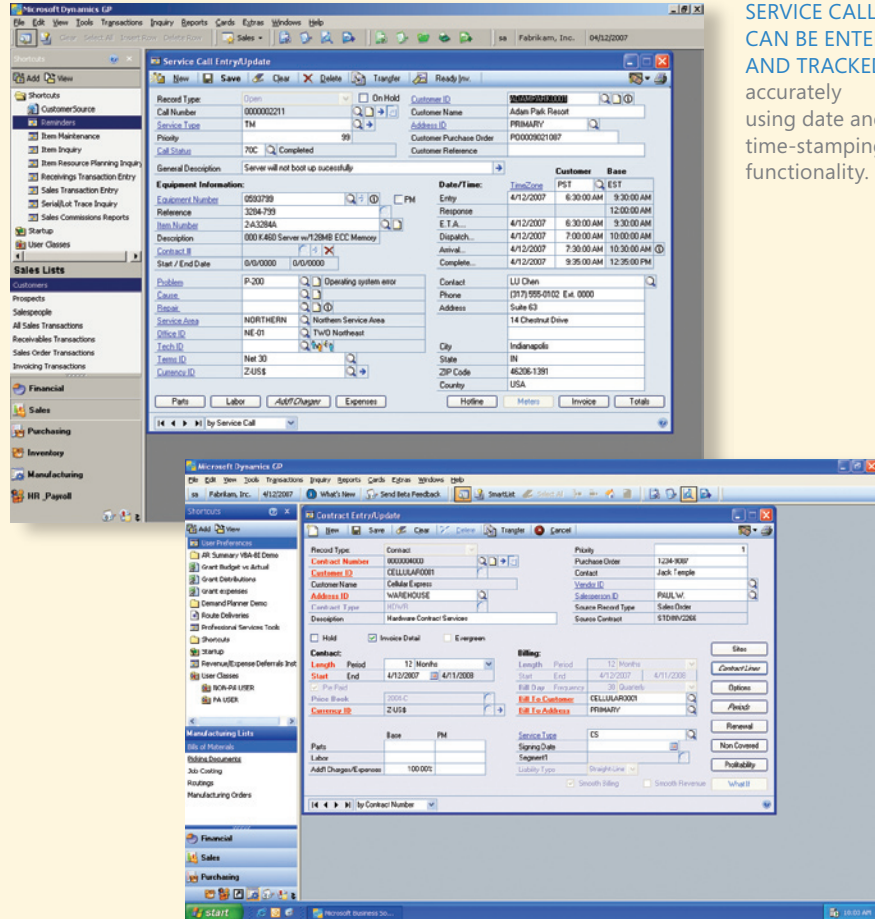
**Give technicians fast access to maps and directions**

Integration with Microsoft MapPoint® provides fast, accurate access to service call and delivery maps and directions from within Microsoft Dynamics™ GP.

**Manage complex field service operations** with higher levels of profitability and customer satisfaction. Field Service Management in Microsoft Dynamics GP integrates essential accounting, distribution, and service processes to increase technician productivity, reduce overhead, and open up new revenue opportunities while focusing on what's important — your customer.

WITHIN A SINGLE USER INTERFACE, provide service managers, dispatchers, and technicians with the information they need.

SERVICE CALLS CAN BE ENTERED AND TRACKED accurately using date and time-stamping functionality.



SIMPLIFY CONTRACT ADMINISTRATION across your organization with robust tracking and streamlined billing capabilities.

[ FEATURES OVERVIEW ]

## Service Call Management

- Create new and track historical service calls.
- Assign appropriately skilled technicians and escalate calls automatically.
- Track parts, labor, and expense details.
- Manage spare parts and truck stock inventory.
- Generate standard and customized reports to track profitability and analyze parts failure, technician utilization, and workload.
- Automate a single consolidated invoice for customers.
- Update service call details including parts and labor usage, expenses incurred, and additional charges levied.
- Monitor customer billing or tracking of service call costs against a customer contract (service agreement) or equipment warranty.
- Gain deep visibility to supporting documents such as service level agreements, parts Returns Material Authorizations (RMAs), parts inventory transfers and parts purchase orders.

## Depot Management

- Setup a depot station of station groups.
- Assign routes and technicians to depot repair work orders.
- Receive items for repair from different sources, and route through stations in your warehouse for return to inventory for sale.
- Enter returns through work order entry or automatically generate returns materials authorization (RMA).
- Transfer or order back-ordered parts.
- Process transactions that keep track of physical movement of inventory items from one site to another, and print picking tickets and packing slips.
- Process inventory receipts and reconcile quantities.
- Print setup, audit, and analysis reports.

## eService Call

- Help reduce call center contacts by allowing customers to view and update open service requests.
- Customers can conduct knowledge base searches, submit new service calls, view historical service calls, and enter meter readings.
- Help ensure 24/7 support for customers with a self-service Web interface that includes keyword search capabilities.
- Provide customers with historical service request details and the ability to generate reprints of historical invoices at their convenience.

[ FEATURES OVERVIEW ]

## Contract Administration

- Create customer quotes for multiple service levels and options, and then convert quotes to contracts with a single click.
- Maintain unlimited contract price books to automate your complex contract pricing.
- Monitor profitability against pricing options.
- Renew contracts by repricing and then reissuing them, or by utilizing auto-renewal capabilities.
- Ensure accurate billing and compliance with service agreements through integration with Service Call Management.
- Utilize contract options and response times to provide customers multiple levels of service agreements.
- Bill customers based on time or meter usage.
- Recognize revenues through five different methods: straight-line, metered, based on calls, block time or retainage.

## Preventive Maintenance

- Forecast purchasing and scheduling requirements based on time in service or actual product usage.
- Coordinate open service requests with upcoming preventive maintenance calls.
- Automatically generate scheduled field service visits based on time in service or equipment usage (metered equipment).
- Track details of Preventive Maintenance activities, including site visits, cancellations and work in process.

## Field Service Anywhere

- Provide remote technicians with online or offline access to Field Service data.
- Enable easy access to assigned service calls.
- Track on-site arrival and completion times.
- Update existing service calls with parts, labor, expenses and additional charges.
- Create new service calls while in the field.
- Review history for customer and/or equipment.

[ FEATURES OVERVIEW ]

## Tech Assist

- Manage calls from any location with two-way synchronization that allows technicians to log, receive, and update technical information using their laptops.
- Update service calls while disconnected, including all parts and labor usage, expenses incurred, and additional charges.
- Make full use of client-based Service Call Management capabilities in the field.

## Returns Management

- Perform automated checks for returns of the same item to identify potential problems.
- Track repair and return status to provide customers with accurate, current information regarding the repair or return of parts and equipment.
- Accurately credit customers based on the original sales invoice.
- Generate customer RMAs from historical customer invoices, service calls or manually.
- Meet customer and vendor requirements for product and part returns, regardless of type, with credit on account, replacement item, cross ship replacement, or repair of items.
- Built-in workflow management allows for a separate RMA item receiving process and RMA closing process.
- Generate RTVs or Depot work orders with a single mouse click.
- Automatically transfer Return to Stock items from the returns warehouse to the main warehouse.

## eReturns

- Provide customers with easy online access to information and processes for returning products and parts.
- Allow customers to initiate the creation of an RMA online at their convenience, without tying up your customer service personnel.
- Help reduce call center contacts by allowing customers to view the status of open RMAs online.

## Depot Management

- Prioritize and schedule internal repair operations.
- Enter and automatically schedule work orders through the workbenches or stations in your internal repair facility.
- Integrate with Returns Management for consistent tracking of customer repairs.
- Enable depot technicians to record and track parts and labor usage during the repair process, including requesting back-ordered parts if needed.
- Roll repair costs into items cost or expense them.

## Field Service Anywhere

### [ BENEFITS ]

#### Access critical information while working in the field

Technicians have real-time, at-a-glance insight into operations and resources when they're working in the field. Connect office and field staff while enhancing the flow of business and technical information via mobile devices—including Pocket PCs with phone capabilities. Technicians also can connect with Microsoft Dynamics GP via a wireless connection, or use a WI-FI network connection over the Internet.

#### Meet specific business requirements with flexible capabilities

Your specific configuration of your internal systems is extended into the remote field; integration with Microsoft Dynamics GP helps ensure consistent business processes and a seamless end-user experience.

#### Speed and optimize scheduling and dispatch

Quickly understand service urgency and resource status, and easily match the best resources for each task to help reduce response times, lower costs, increase customer satisfaction, and boost profitability.

#### Streamline the work order life cycle

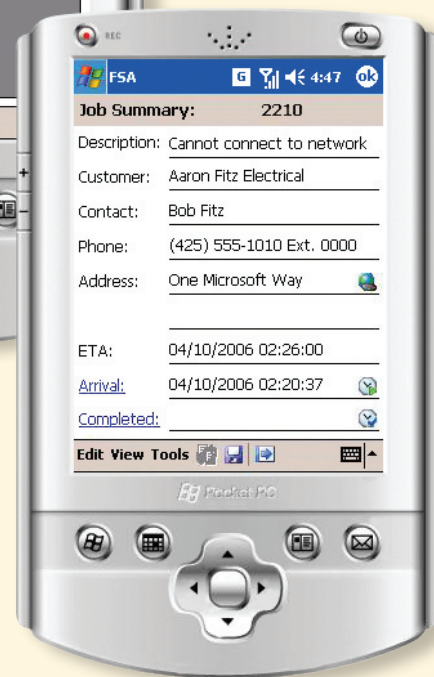
Enable rapid response to service calls and speed work order processes—including creation, assignment, dispatch, closure, and billing. Efficient integration and automated processes help eliminate manual tasks, redundant data entry, and unnecessary paperwork.

**A robust mobile solution for field operations** helps ensure your customers receive the service that builds their loyalty and your profitability. With Field Service Anywhere in Microsoft Dynamics™ GP, technicians can use mobile devices to log, receive, and follow service calls from remote locations, helping improve response times and first-time fix ratios. Full integration with Microsoft Dynamics GP and automatic synchronization of data help reduce paperwork, eliminate costly errors, and give your business a competitive edge for customer service.



#### REAL-TIME SCHEDULE SUMMARIES

enable accurate daily or weekly scheduling, efficient time management, and higher utilization rates.



**THE FAMILIAR, EASY-TO-USE INTERFACE** gives technicians real-time access to detailed job summary data from the field.

[ FEATURES OVERVIEW ]

**Remote Service Call Capabilities**

Technicians working in the field can log, receive, and follow service calls, as well as access critical customer data in real time.

**Seamless Integration with Microsoft Dynamics GP**

Connect with Microsoft Dynamics GP via any mobile device — including Pocket PCs with phone capabilities — that runs on Windows® Mobile 5.0.

**Wireless Flexibility**

Connect with Microsoft Dynamics GP via a wireless connection, or a WI-FI network connection over the Internet via VPN connection.

**Real-Time Access to Mission-Critical Data**

Field technicians have access to critical data, including customer names and addresses, Open Service Calls by Technician, Customer History, Installed Equipment and Serial numbers, Service Contract information, Inventory Items and Prices, and Truck Stock Inventory.

**Runs in Online or Offline Mode**

Field Service Anywhere can be run in online mode for real-time access to data, or in offline mode and synchronized later, depending upon your preferences or wireless signal limitations.

**Scalability**

Scale to over 1,000 remote users to accommodate changing service management needs.

**Expense Capture**

Online expense forms allow technicians to track and log expenses, helping reduce redundant data entry and paperwork and expedite accounting processes.

**Signature Capture**

Customers can sign off completed work orders electronically, helping reduce paperwork.

**Online/Offline Auto Switch for Data Security**

In the event of a drop-in wireless connection, Field Service Anywhere automatically switches to offline mode and stores data locally. When the wireless connection is restored, data automatically synchronizes with Microsoft Dynamics GP servers.

**Accept, Reject or Reassign Work Orders from the Field**

Easily assign work orders to a technician who may already be in a specific geographic area. That technician has the ability to accept, reject or reassign the work order based on availability.