



Advanced Field Service

Deliver intelligent, world class field service, managing all aspects of the end-to-end field service management cycle!
Optimize business processes and drive business growth with our proven solutions and premier services.

We understand your need to streamline operations when facing increased competition and cost-cutting initiatives. We realize to maintain competitive advantage, you must accomplish more with less staff, while customers continue to demand higher service levels.

The momentum for enhanced field service productivity has never been greater. In today's professional service organizations, managing every aspect of the end-to-end cycle of field service management is critical.

Microsoft Dynamics 365 for Field Service allows organizations of any size to deliver intelligent, world class field service, managing all aspects of the end-to-end field service management cycle.

Dynamics Software Advanced Field Service offers additional functionality on top of Dynamics 365 for Field Service for e.g.:

- extended case management integration
- new customer asset features
 - such as warranty
- new agreement features
 - such as agreement coverage
- and improved work order actuals registration.

BENEFITS

- Customer Asset and Agreement information directly available for helpdesk employees
- Improved integration Customer Assets and Agreements
- Work Orders executed under Warranty
- Work Orders executed under Agreement Coverage
- Larger potential for Power BI reporting by several additional entities
- Improve billing accuracy by automatic Warranty and Agreement Coverage detection
- Solid basis for implementation Field Service

Gold
Microsoft Partner

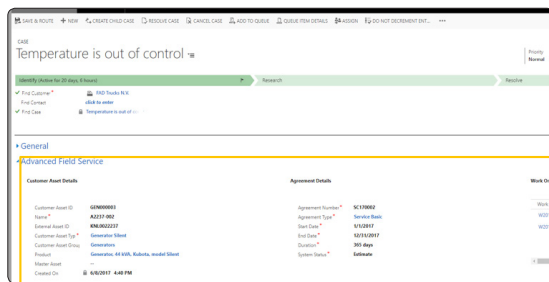



For more information about
Dynamics Software please visit:
dynamicssoftware.com

CASE MANAGEMENT INTEGRATION

We have extended the integration between Cases from D365 for Sales and the information available for customers in Field Service. Your helpdesk employees are now directly able to link a Case to a Customer Asset and to the Agreement that is linked to the Customer Asset. Detailed information of these entities are directly visible in the section Advanced Field Service of the Case.

Further, we have improved the default behavior of the field Incident Type which is required when a Case is converted to a Work Order. By selecting a Service Category (a type of service i.e. Corrective Service or IoT Predictive Maintenance) and Service Incident Type (the type of required work) a workflow will automatically fill the required Incident Type in the Case. This way it is possible to automate the registration of a Case (i.e. triggered by IoT) to a Work Order without the interference of an employee.



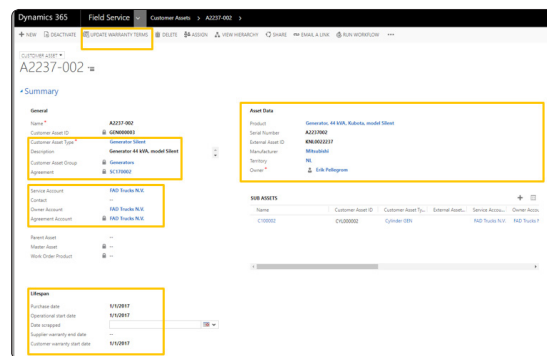
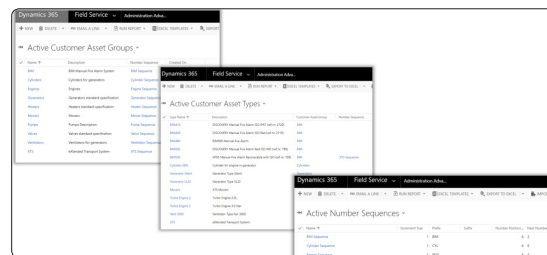
Additional information such as Complaint, Cause and Solution codes can be registered against the Case and we have visualized the related Work Orders in the Case.

ADDITIONAL CUSTOMER ASSET FEATURES

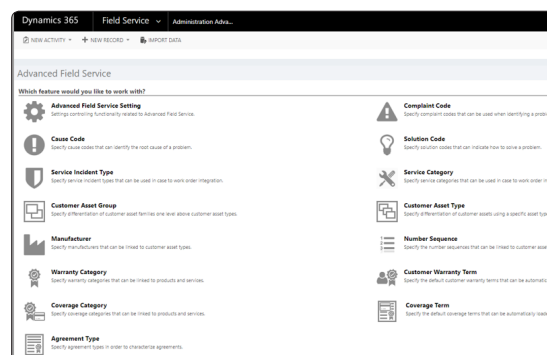
We have extended the Customer Asset significantly with various additional information fields, the link to an Agreement and Agreement Account, views to related Cases and Work Orders and we have introduced Customer Asset Warranty.

Think of registering thousands or tens of thousands or even millions of Customer Assets (yes that happens in Field Service!). In standard Field Service there is no unique identifier other than the Name of the Customer Asset. By introducing Customer Asset Type, Customer Asset Group and the connection of a Number Sequence to these entities, Advanced Field Service allows you to generate unique Customer Asset ID's automatically when saving the record.

Not to mention that using Asset Type and Asset Group gives you enormous possibilities in Power BI (i.e. which type of Assets are generating the most Repair Work orders or which problem (Complaint code in Cases) occurs in what type or group of Customer Assets most frequently).



Next to additional information on the Customer Asset itself we have introduced Warranty on Customer Assets. The additional entities that we have added, and which contain setup data, can be accessed via the page Administration Advanced Field Service. One of these entities is the setup of Customer Warranty Terms where your company's generic Warranty Terms for Customer Assets can be defined.



Dynamics 365
Field Service
Customer Assets
A2237-001

NEW
DEACTIVATE
UPDATE WARRANTY TERMS
DELETE
ASSIGN
VIEW HIERARCHY
SHARE

CUSTOMER ASSET
A2237-001

Summary
Customer Asset Warranty Terms

Customer Warranty Term	Warranty Category	Warranty Period	Warranty Period
AT - Generator Silent - Wear & Tear - 1 year	Wear & Tear		1 Year
AT - Generator Silent - Electrical - 1 year	Electrical		2 Year
AT - Cylinder - Mechanical - 1 year	Mechanical		1 Year
All - Repair - 6 months	Repair		6 Month

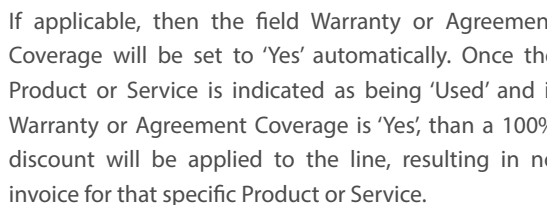
For Agreements we have developed two main features. Firstly we have created the ability to link Customer Assets to an Agreement, without having to define a Booking Setup (preventive maintenance). In standard Field Service a Customer Asset is only linked to an Agreement if a preventive maintenance schedule is included in the Agreement. With Advanced Field Service you are able to connect as much as Customer Assets to an Agreement as you want, without the necessity to define preventive maintenance for the Customer Assets.

The screenshot shows the Dynamics 365 Field Service 'Agreements' page for account SC170003. The page has a top navigation bar with 'Home', 'Dashboards', 'Upcoming Customer Visits', 'Agreements', 'Copy Agreement', 'Process', 'Review', and 'More'. The 'Agreements' tab is selected. Below the navigation bar, there's a sub-navigation bar with 'Agreement Status' and 'Agreement Invoice Setup'. The main content area shows a list of agreements, with one highlighted in yellow. Below the list is a table of agreement details.

Name	Customer Asset ID	Customer Asset To	External Asset	Service Asset	Owner Account	Agreement Account	Agreement	Territory	Product	Parent Asset
V100001	VEN00001	Van 300	N/A	Networks B.V.	Networks B.V.	Networks B.V.	SC170003	NL		V100001
C100001	CEN00001	Container 1000	N/A	Networks B.V.	Networks B.V.	Networks B.V.	SC170003	NL		V100001
V100002	VEN010001	Van 1000	N/A	Networks B.V.	Networks B.V.	Networks B.V.	SC170003	NL		A0001000
A001001	QEN00001	Generator 5000	N/A	Networks B.V.	Networks B.V.	Networks B.V.	SC170003	NL	Generators, 40-500 kW, 5000	



In Advanced Field Service both Customer Asset Warranty as well as Agreement Coverage are checked when registering actual used Products and Services against a Work Order. When Products and Services are automatically loaded or manually inserted in a Work Order, a plugin will check if Warranty or Agreement Coverage is applicable.



ADVANCED FIELD SERVICE: A QUICK OVERVIEW

Cases	<ul style="list-style-type: none"> • Service Category and Service Incident Type • Complaint, Cause and Solution Codes • Link Customer Asset and Agreement in Cases • Detailed information about linked Customer Asset and Agreement • Show Work Orders that have been created for a Case • Additional information in several views
Customer Assets	<ul style="list-style-type: none"> • Additional fields such as Serial number, Operational start date and External Asset ID • Owner Account and Agreement Account • Customer Asset Type & Customer Asset Group for categorizing Customer Assets • Automatic generating unique Customer Asset Id's • Hierarchy display of Customer Assets • Setup of generic Customer Warranty Terms • Warranty update based on Warranty start date of Customer Asset (for parent and childs) • Customer Asset Warranty Terms • Additional information in several views
Agreements	<ul style="list-style-type: none"> • Link Customer Assets to Agreement without the requirement to add preventive maintenance • Agreement Type for categorizing Agreements • Setup of generic Coverage Terms • Coverage update based on Coverage start date of Agreement • Agreement Coverage Terms • Additional information in several views
Work Orders	<ul style="list-style-type: none"> • Inherit Customer Asset and Agreement when Work Order is converted from a Case • Warranty indicator on Products and Services • Agreement Coverage indicator on Products and Services • Automatically apply Warranty and Agreement Coverage to Products and Services • Improved billing accuracy
Pre-requisite	<ul style="list-style-type: none"> • Microsoft Dynamics 365 for Field Service 6.1.2.93 or higher

ABOUT DYNAMICS SOFTWARE

Dynamics Software offers powerful industry-focused solutions integrated in Microsoft Dynamics 365 and solutions using Azure, Office 365 and SharePoint; supported by premium services from our highly experienced industry and domain experts. Our solutions are sold, implemented & supported worldwide by our industry experts, premier partners as well as selected Sales and Certified Value Added Resellers. Dynamic Software's outstanding dedication to customer satisfaction through the delivery of innovative business solutions saw us being named to 2014 Microsoft Dynamics Presidents Club. For more information visit dynamicssoftware.com.

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