dynamics service

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
- Customer asset features such as warranty, customer asset address
- Customer asset structure designer, properties
- Agreement coverage
- Improved work order actuals registration

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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

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.
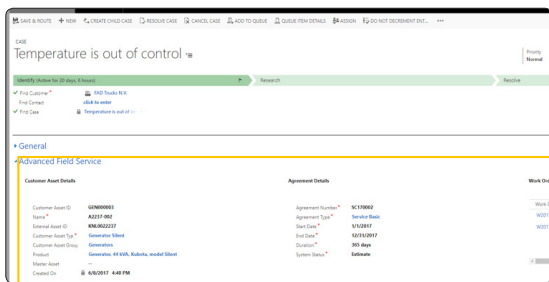

Additional information such as Complaint, Cause and Solution codes can be registered against the Case and we have visualized the related Work Orders in the Case.

## 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).
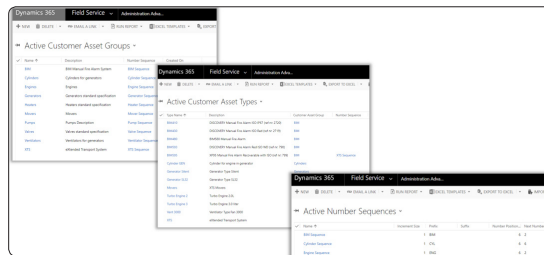

Next to additional information on the Customer Asset itself we have introduced Warranty on Customer Assets. The additional entities that we have added, and which contain setup data, can be accessed via the page Administration Advanced Field Service. One of these entities is the setup of Customer Warranty Terms where your company's generic Warranty Terms for Customer Assets can be defined.
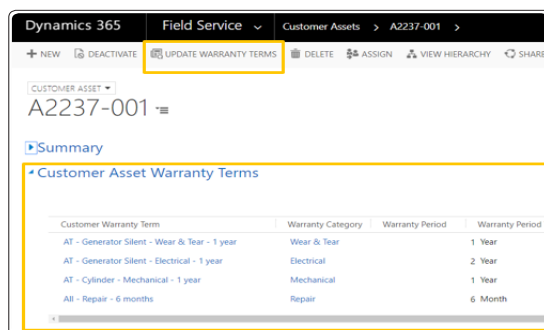
In the Customer Asset itself a new option is available to update (or load) the Customer Warranty Terms to a specific Customer Asset. These Customer Asset Warranty Terms are then checked when Products or Services are used in a Work Order which might result in a valid Warranty resulting in no invoicing of that particular Product or Service.

In our newest release of Advanced Field Service we introduced the new Customer Asset Structure Designer which allows you to build your Customer Assets via drag & drop functionality using Customer Asset Types and Templates.
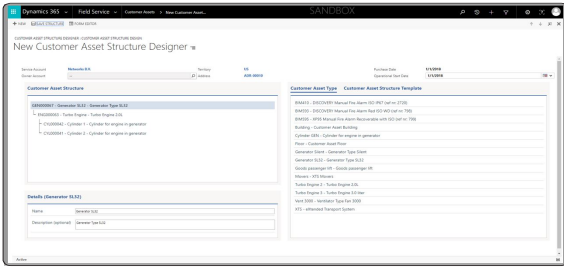
Further we have introduced Customer Asset Properties which allows you to define different attributes on a Customer Asset Type. These attributes will be auto saved to a Customer Asset when the Customer Asset is created.

Last but not least we have introduced an address field which allows you to define a specific Customer Asset Address different to the Service Account address. The address will be used in a Work Order.

ADDITIONAL AGREEMENT FEATURES

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.
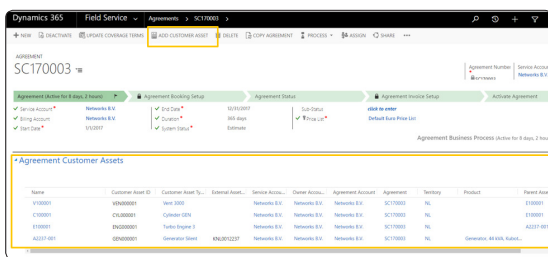

Secondly, we introduced Coverage Terms. Coverage Terms are using the same principle as Customer Warranty Terms. Coverage Terms represent what you as a company cover in a specific type of Agreement (i.e. Time & Material is covered).
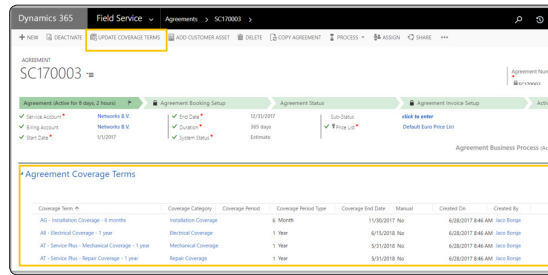
In the Agreement itself a new option is available to update (or load) the Coverage Terms to a specific Agreement. These Agreement Coverage Terms are then checked when Products or Services are used in a Work Order which might result in a valid Agreement Coverage resulting in no invoicing of that particular Product or Service.

IMPROVED WORK ORDER ACTUALS REGISTRATION

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.
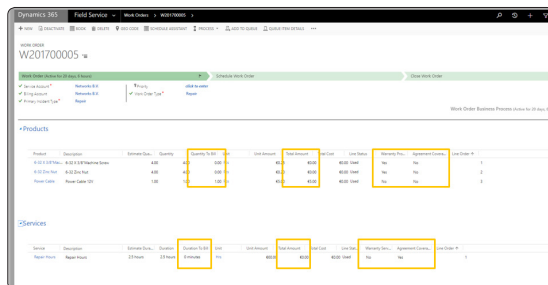
If applicable, then the field Warranty or Agreement Coverage will be set to 'Yes' automatically. Once the Product or Service is indicated as being 'Used' and if Warranty or Agreement Coverage is 'Yes', than a 100% discount will be applied to the line, resulting in no invoice for that specific Product or Service.

ADVANCED FIELD SERVICE: A QUICK OVERVIEW

Cases	• 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	• 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 (also with a discount %) • Warranty update based on Warranty start date of Customer Asset (for parent and child) • Customer Asset Warranty Terms • Additional information in several views • Customer Asset Structure Designer • Customer Asset Templates & Template Designer • Customer Asset Type Properties & Property Option Sets • Customer Asset Properties • Customer Asset Address
Agreements	• Link Customer Assets to Agreement without the requirement to add preventive maintenance • Agreement Type for categorizing Agreements • Setup of generic Coverage Terms (also with a discount %) • Coverage update based on Coverage start date of Agreement • Agreement Coverage Terms • Additional information in several views • Load Customer Asset Structure in Agreement
Work Orders	• 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 • Load Work Order Address from Customer Asset if applicable • Manual Work Order Address
Pre-requisite	• Microsoft Dynamics 365 for Field Service 6.1.2.93 or higher

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