

Field Services for Microsoft Dynamics™ AX

Product Positioning:

Field Services for Microsoft Dynamics AX can empower you to streamline and optimize field service operations for increased customer satisfaction, greater profitability, and a competitive advantage.

Consumer Promise:

Field Services for Microsoft Dynamics AX helps you boost efficiency, reduce operating costs, and build customer loyalty by integrating information, people, and resources to better manage the work order life cycle.

Efficiency	Connectivity	Insight	Flexibility
<p><i>Field Services for Microsoft Dynamics AX helps you streamline field service processes and optimize resources to boost customer satisfaction, enhance profitability, and build a competitive advantage.</i></p> <ul style="list-style-type: none"> • Integrate and manage field service operations from end to end to increase profitability and customer satisfaction. • Enable rapid-response call taking, work order creation, and dispatch with automated best-fit assignments and route optimization. • Take advantage of an intuitive, visual interface to streamline use and increase productivity. 	<p><i>Field Services for Microsoft Dynamics AX integrates work order life-cycle management, enhances communication with field and route service staff, and puts critical information at the fingertips of employees, managers, and customers to save time, help reduce errors, and improve first-time fix ratios.</i></p> <ul style="list-style-type: none"> • Facilitate real-time information exchange between sales, office, and field staff and with customers. • Connect with third-party and other Microsoft applications to maximize your IT investment. • Integrate management of contracts, warranties, assets, and work orders. • Facilitate communication with remote employees about job status, timekeeping, safety compliance, and general business information. 	<p><i>Field Services for Microsoft Dynamics AX provides deep insight into job scheduling, dispatch, resolution, remote inventories, and timekeeping across multiple locations. You can track work in real time and manage your field service processes, materials, and staff for increased profitability and customer satisfaction.</i></p> <ul style="list-style-type: none"> • Gain real-time access to job and personnel status. • Effectively plan resource and materials use, and track inventories at both fixed and mobile locations. • Manage employee development with dynamic qualification tracking and performance scorecards. • Obtain business intelligence for decision-making through robust reporting and analysis capabilities. 	<p><i>Field Services for Microsoft Dynamics AX adapts to your business processes and terminology and can be tailored to unique industry needs while providing the agility to adapt to day-to-day scheduling, workload, and resource changes, as well as long-term business growth.</i></p> <ul style="list-style-type: none"> • Tailor the solution to fit your back-office systems and meet unique industry requirements. • Gain the information, tools, and reaction speed required to address changing service needs and resource calendars. • Customize the solution to grow with your business as your opportunities expand.

<p><i>Integrate and manage field service operations from end to end to increase profitability and customer satisfaction.</i></p> <ul style="list-style-type: none"> • Reduce manual processes, paperwork, keying errors, and redundant data entry. • Speed work order closure and invoicing to increase data accuracy and improve cash flow. • Link back-office systems and customer information with field service operations for improved customer service and comprehensive business management. • Extend visibility of enterprise customer and equipment information to field personnel. • Gain more accurate and complete information about field service activities. • Manage complex projects while considering task dependencies, time constraints, resource calendars, and skill sets. <p><i>Enable rapid-response call taking, work order creation, and dispatch with automated best-fit assignments and route optimization.</i></p> <ul style="list-style-type: none"> • Take service calls more quickly and completely with instant access to information on customers, equipment, job sites, and work orders. • Capture and expand access to critical information to support wise dispatch decisions, and automate those decisions when appropriate. 	<p><i>Facilitate real-time information exchange between sales, office, and field staff and with customers.</i></p> <ul style="list-style-type: none"> • Connect and coordinate personnel across multiple locations and time zones to support hundreds of dispatchers and thousands of service staff in the field. • Put customer, equipment, and technical data at the fingertips of field personnel to increase first-time fix ratios. • Provide field staff with procedural checklists and best practices to build service consistency and quality. • Provide customers with visibility into work order status, and with the ability to submit new requests by using Microsoft Office SharePoint® Portal Server 2003. • Capture more customer information from the field over time, and strengthen customer relationships. <p><i>Connect with third-party and other Microsoft applications to maximize your IT investment.</i></p> <ul style="list-style-type: none"> • Create a smooth interface between enterprise systems, including existing call center packages and mobile devices in the field, to build a comprehensive business management system. • Help field service staff work with a solution that resembles familiar Microsoft programs and integrates closely with powerful technologies such as Microsoft SQL Server™ 2000 and the Microsoft Office System. • Use Microsoft MapPoint® 	<p><i>Gain real-time access to job and personnel status.</i></p> <ul style="list-style-type: none"> • Know at a glance where trucks and people are located with a visual Global Positioning System (GPS) tracking system enabled by Microsoft MapPoint. • Track work order progress from creation to closure. • Provide customers with more accurate estimates of arrival times or work completion. • Gain the understanding to redeploy resources to meet unexpected needs. <p><i>Effectively plan resource and materials use, and track inventories at both fixed and mobile locations.</i></p> <ul style="list-style-type: none"> • Capture labor time and materials use immediately for more accurate comparisons and forecasting. • Decrease the number of costly write-offs with up-to-the-minute tracking of field parts and materials in trucks, including purchases made en route. • Help reduce costs with bulk buys and just-in-time replenishment based on scheduled future activities. • Use detailed historical information to build better predictability into your business. • Offer customers appealing fixed-cost contracts with the assurance of a healthy bottom line. <p><i>Manage employee development with dynamic qualification tracking and performance scorecards.</i></p> <ul style="list-style-type: none"> • Integrate employee experience and 	<p><i>Tailor the solution to fit your back-office systems and meet unique industry requirements.</i></p> <ul style="list-style-type: none"> • Configure the solution to the terminology and processes your business uses through a set of tools that easily facilitate solution agility. • Take advantage of an open integration architecture and tools to accommodate additional functionality such as equipment monitoring devices, remote data collection, or other systems unique to your industry. • Communicate with a variety of Windows Mobile™ platforms and devices, including Pocket PCs and Smartphones. • Configure the solution to integrate with more complex devices and multiple carriers as needed. <p><i>Gain the information, tools, and reaction speed required to address changing service needs and resource calendars.</i></p> <ul style="list-style-type: none"> • Manage work calendars for crews, vehicles, and other resources. • Schedule resources by the day or week. • Keep customers happy and help ensure full payment of tiered pricing agreements with automatic escalation for time-sensitive commitments. • Spot urgent service needs with visual alerts. • Track truck and crew locations geographically with GPS support in Microsoft MapPoint. • Communicate instantly with the
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<ul style="list-style-type: none"> • Generate work orders automatically or with convenient drag-and-drop tools for optimal scheduling and dispatch. • Optimize work order assignments based on skill sets, resource availability, urgency, and routing for best-fit dispatching. • Accommodate and maintain sequential dependencies among resources and work orders. • View schedules by project, technician, or site, and assess resources from supply or demand perspectives. • Track and manage work orders from creation and acknowledgement processes through signature capture and closure. • Capture data on job completion, materials use, and time utilization remotely and in real time. <p><i>Take advantage of an intuitive, visual interface to streamline use and increase productivity.</i></p> <ul style="list-style-type: none"> • Ensure rapid adoption with a familiar Microsoft® Windows® interface. • Use drag-and-drop tools for quick, intuitive scheduling. • View job and personnel status geographically. • Quickly understand work order type, escalations, and time constraints with icons and color-coded alerts. 	<p>integration to geographically track resources and provide dynamic, street-level maps and route directions to field staff.</p> <p><i>Integrate management of contracts, warranties, assets, and work orders.</i></p> <ul style="list-style-type: none"> • Use hierarchical structures to segregate and manage multiple contracts, contacts, sites, equipment components, or billing rates for a single customer or property. • Manage work orders by job location, contract, or employee, or by using a variety of other views. • Plan resource requirements and automatically create work orders for preventive and periodic maintenance. • Record and enforce service contract terms and conditions, including different billing rates for various types of work and materials. • Manage contract service locations, assets, and service level agreements (SLAs), and track work against them. • Automatically generate appropriate SLA work orders, escalations, and invoices. • Identify and classify serviceable assets by using barcodes and serial numbers, track manufacturer and vendor warranties against assets, store maintenance records, and retain location and repair histories. • Create and maintain asset hierarchies for maintenance management and reporting. 	<p>certifications into best-fit decisions for work order assignment.</p> <ul style="list-style-type: none"> • Maintain dynamic records of crew qualifications by capturing and integrating information about individual experience with a given customer, piece of equipment, type of problem, or site. • Generate scorecards for field, office, and sales staff. <p><i>Obtain business intelligence for decision-making through robust reporting and analysis capabilities.</i></p> <ul style="list-style-type: none"> • Analyze financial performance, profitability, productivity, trends, and utilization rates. • Access detailed information on contracts, assets, warranties, and related activities. • Obtain reports and rollups on the fly via OLAP cubes. 	<p>field to relay task-critical information or new priorities.</p> <p><i>Customize the solution to grow with your business as your opportunities expand.</i></p> <ul style="list-style-type: none"> • Maximize resource investments by readily adding a variety of new resources and factoring them into work order assignment. • Extend the solution and help ensure ongoing innovation through close integration with other Microsoft applications and with standards-based technologies including XML and SOAP. • Build on the flexible Microsoft .NET Framework and Web services foundation to customize the solution as your business grows and circumstances change.
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	<p><i>Facilitate communication with remote employees about job status, timekeeping, safety compliance, and general business information.</i></p> <ul style="list-style-type: none"> • Enable field employees to instantly report information about job status or completion, materials used, and time spent. • Automate employee timekeeping for faster, easier payroll. • Reduce the need for remote employees to visit the office by disseminating policies, safety updates, procedures, and technical information through mobile devices. 		
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