Dynamics Advanced Field Service

for Microsoft Dynamics 365 Field Service

Content

Accelerate your business with *World-Class End-to-End Field Service Management*

1 *Introducing*
Dynamics Advanced Field Service

For professional service organizations, managing every aspect of the end-to-end cycle of field service management is critical. In an ever-changing world with a growing focus on servitization field service organizations must adapt.

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

Back end automation is one of the biggest drivers of revenue growth Field Service companies. Microsoft Dynamics 365 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 Advanced Field Service offers significant additional functionality on top of Dynamics 365 Field Service in the areas of Case Management, Customer Assets, Agreements, Work Orders and Invoicing.

Benefits

- ✔ A solid basis for the implementation of Microsoft Dynamics 365 Field Service

- ✔ Customer Asset and agreement information directly available for employees

- ✔ Robust Work Order execution under warranty and Agreement Coverage

- ✔ Improved billing accuracy by automatic warranty and agreement coverage detection

- ✔ High potential for Power BI reporting through many additional entities

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Case Management
Integration
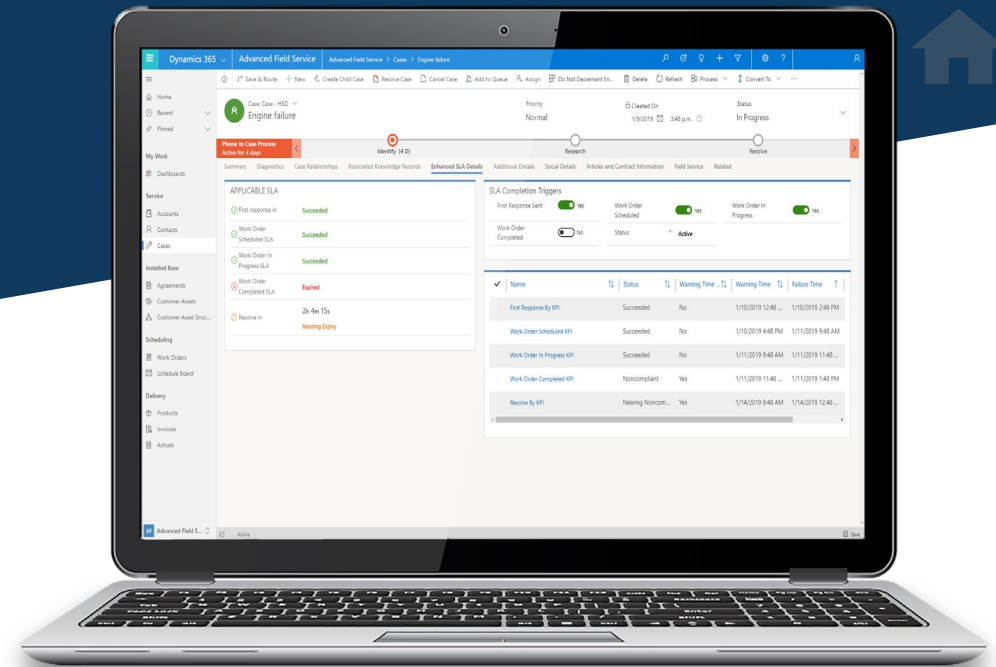
The integration between Cases from Dynamics 365 for Customer Service and the information available for customers in Dynamics 365 Field Service has been thoroughly extended.

Your helpdesk employees will be able to directly link a Customer Asset to a case and relevant details of the Customer Asset will become visible. If this Customer Asset is linked to an active agreement, the case will be linked to the agreement as well, showing relevant details of the agreement in the case.

Within Dynamics Advanced Fields Service we have enabled SLA's in agreements. The agreement integration in cases enables you to default your case SLA based on the linked agreement and Customer Asset. This way you can really specify your customers SLA requirements on agreement level and even make the SLA Customer Asset specific. With our standard available SLA KPI's you can, for example, measure if a Work Order created from a case is scheduled, performed and completed on time.

Additional information such as Complaint, Cause and Solution codes can be registered against a Case, and related Work Orders in the Case are easily visualized for employees.

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3   Extended *Customer Assets*
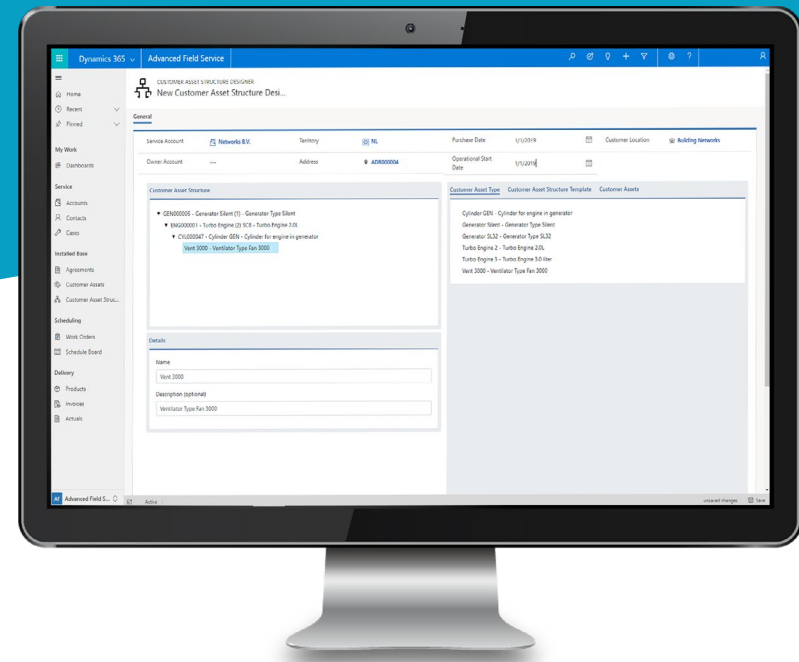
The entity Customer Asset has been extended with various additional information fields, with an owner & agreement account, with views to related Cases and Work Orders and we have introduced Customer Asset Warranty.

Imagine yourself having to register thousands or even millions of Customer Assets. 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,

Dynamics Advanced Field Service allows you to generate unique Customer Asset ID's automatically when saving a record. Using the Asset Type and Asset Group provides you with enormous reporting possibilities using Power BI.

We have introduced warranty on Customer Assets which allows you to define if spent hours and used materials on a Work Order are covered under warranty or not. In most scenarios that lead to a discount percentage on the transactions leading to a lower invoice.

You will undoubtedly enjoy the benefits of our Customer Asset structure designer which allows you to build your Customer Asset structures via a drag & drop function. By using Customer Asset types and Customer Asset templates a structure can be created in a few seconds. Even changing existing Customer Asset structures is easy via the designer.

With our Customer Asset Properties, you can define attributes for your Customer Assets without having to customize additional fields on the Customer Asset entity.

In the Customer Asset itself, an option is provided that enables you 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 that particular product or service not being invoiced.

Customer Asset Properties 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.

Further, you have the availability of an address field which allows you to define a specific Customer Asset Address, different from the Service Account address. This address will be used in a Work Order.

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Customer Asset Type Dependent Incident Type Defaults

Microsoft Dynamics 365 Field Service Incident Types act as service templates that allow users to quickly create work orders for the most common types of jobs that an organization performs. Adding an incident type to a work order can provide details like duration, work order service tasks, products, services, and characteristics (skills). This means incident types effectively serve as work order templates that prepopulate information, which can be manually edited as needed.

However, an Incident Type in Microsoft Dynamics 365 Field Service is a generic setup entity and is not specifically related to the type of a customer asset, which is linked to a work order. For example, if incident type Repair is defined in the setup, it will not be possible to specify defaults for all types of customer assets in this single incident type. If, for example, an organization services both copiers as well as air conditioning units, then specific defaults such as spare parts or skills for both types in a single incident type will not be the best approach. The organization will most likely decide to define two incident types: one for Repair Copier and one for Repair Airco, each of them having their own specific defaults. Using this approach, might eventually even blow up the setup entity Incident Types, which might result in users getting confused and making more errors when trying to select the correct incident type.

To overcome this situation, Dynamics Advanced Field Service contains the functionality Customer Asset Type Dependent Incident Type Defaults. This functionality is based on the entity Customer Asset Type, which is part of Dynamics Advanced Field Service as well and can be used to categorize customer assets. As in our example above, both customer asset types Copier and Airco, could be the categorization of these types of customer assets.
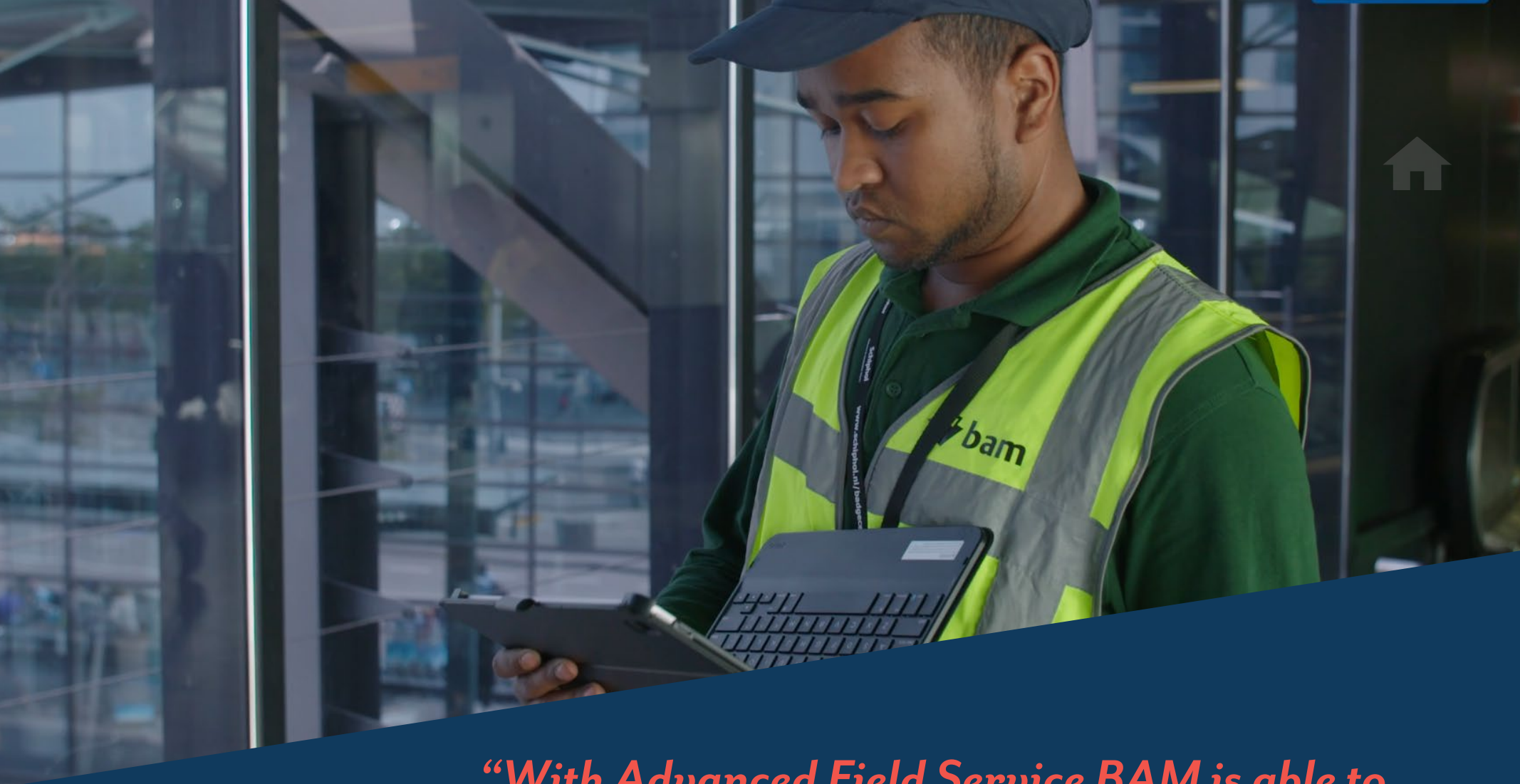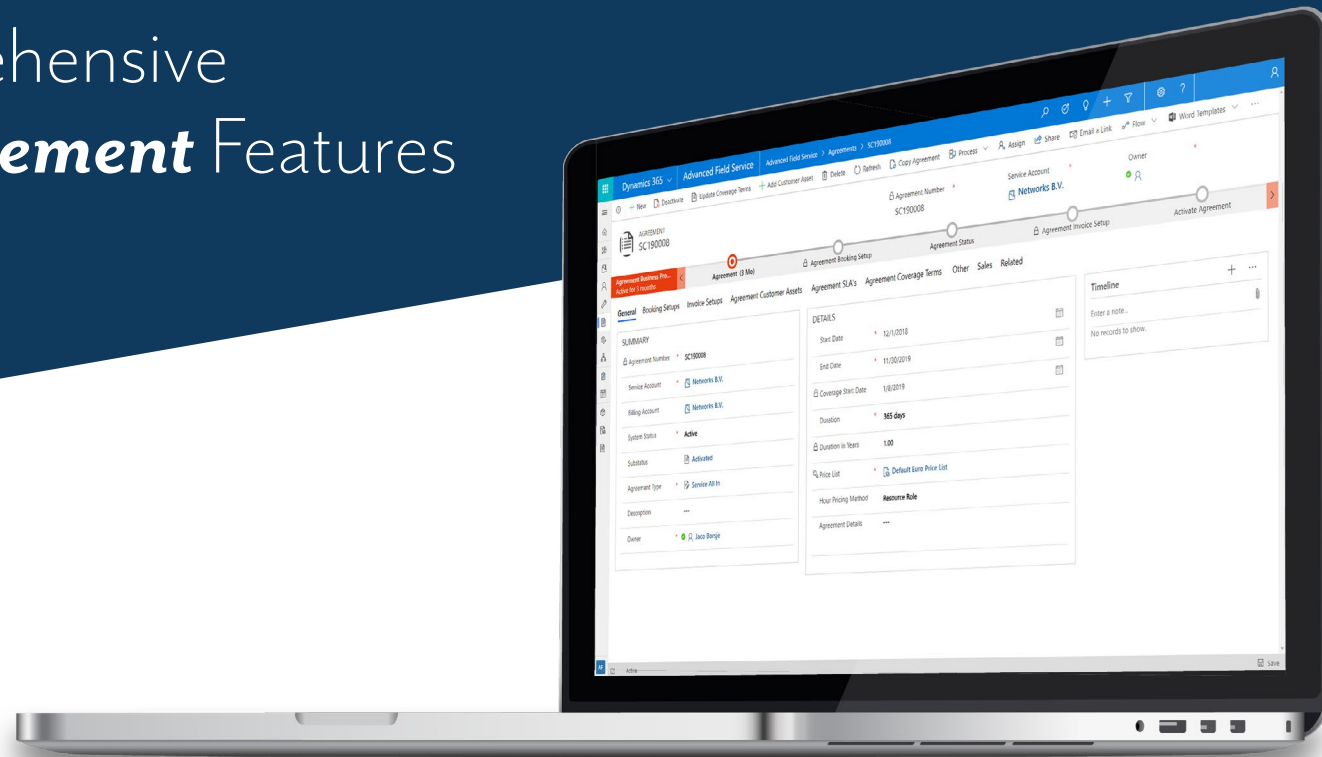
"With Advanced Field Service BAM is able to offer Schiphol Airport customer service excellence.

Anouk Schrauwen, IT Business Partner at BAM Bouw and Vastgoed Nederland bv

Comprehensive
Agreement Features

In agreements, you have the ability to link Customer Assets without having to define a Booking Setup for preventive maintenance.

In standard Field Service, a Customer Asset is only linked to an agreement if an agreement booking setup is defined. With Dynamics Advanced Field Service you can connect as much Customer Assets to an agreement as you want, without the necessity to define an agree-

ment booking setup. This way the coverage of a Customer Asset in an agreement is defined and also identified in cases and Work Orders.

We also introduced agreement coverage terms. These terms represent what you as a company cover in a specific type of agreement. These terms are checked when products or services are used in a Work Order which might result in that particular product

or service not being or partly being invoiced. Last but not least we have enabled SLA's in agreements. It is now possible to define an agreement specific SLA and it is even possible to link a specific SLA to a specific Customer Asset in that agreement. This functionality is fully integrated into cases as upon case registration the SLA from the agreement or Customer Asset will be detected.

Copy Agreement Entities

Microsoft Dynamics 365 Field Service has out of the box functionality to copy agreements. This function can be used to renew an agreement that is going to expire soon. In the dialog that appears after calling the Copy Agreement function in the ribbon, a user can select the items that are required to be copied into the new agreement.

In Dynamics Advanced Field Service, we have added three new parameters that allow you to define which Dynamics Advanced Field Service entity records should be copied to a new agreement as well while calling that standard copy function. A separate plugin from Dynamics Advanced Field Service is triggered when the copy function from the standard is called. Based on the new parameters from the agreement, this will result in copying records out of the selected entities into the new agreement.

Agreement SLA Setup

The entity Agreement SLA Setup is used to define Case SLA's and Work Order SLA's that are covered under an agreement. An agreement SLA can be defined for all customer assets that are covered in the agreement by leaving field Customer Asset empty. However, it is also possible to define customer asset-specific agreement SLA's for both SLA entity Case as well as Work Order.

Once an agreement has been activated and the current date is within the effective period of the agreement, the agreement can be detected automatically in a case or a work order. This will only be triggered if the case or work order is linked to a (primary) customer asset that is covered by an agreement. If an agreement is detected, it will also check for a generic or customer asset-specific agreement SLA (the record that is not linked to a specific customer asset.

Extensive *Work Order* Features

In Dynamics 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. If applicable, the field Warranty or Agreement Coverage will be set to 'Yes' and a discount percentage will be applied to the line, resulting in that specific Product or Service not being or partly being invoiced.
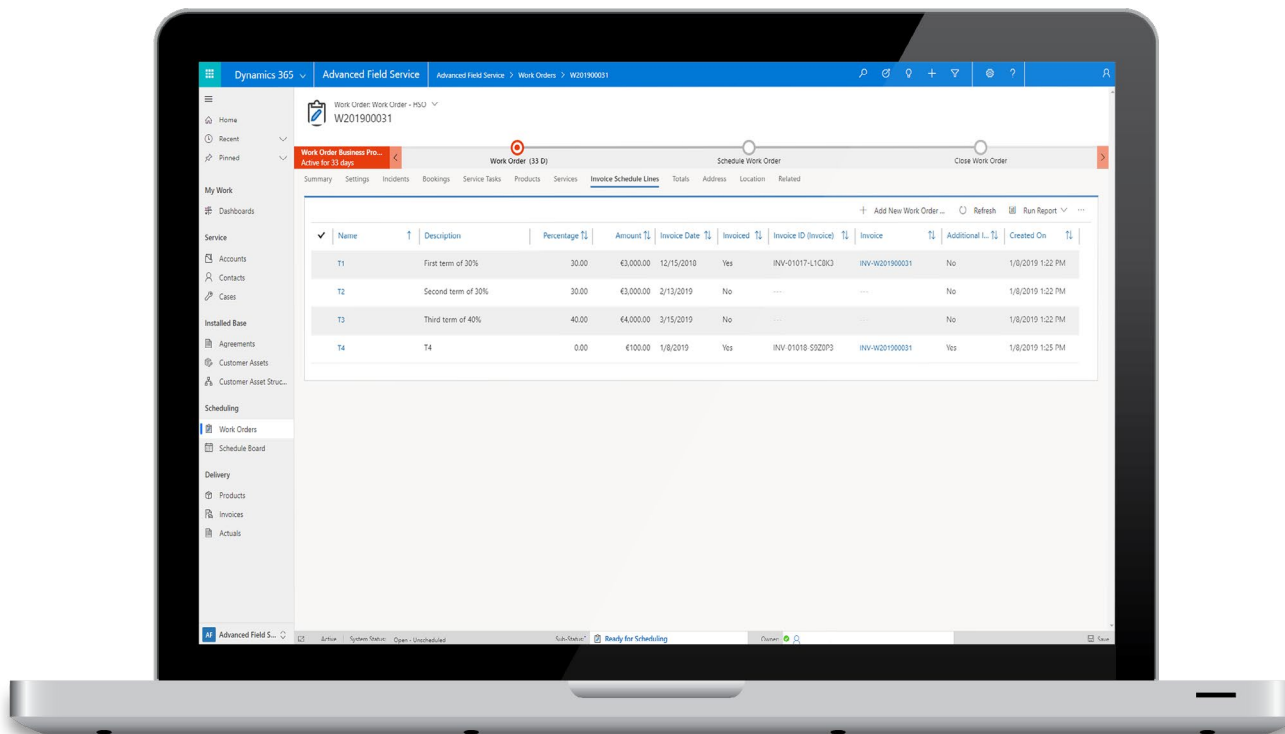
✓ Automatically invoice a Work Order for a fixed price using an invoice schedule with Work Order invoice schedule lines.

✓ Get organized with estimated Work Order Totals Overviews, actual and invoiced amounts that have been extended, including fixed price.

✓ Use functionality that overrules standard hourly sales rates of working hours based on the resources executing the Work Order with for example junior, medior or senior engineer rates.

✓ Add surcharge percentages on top of hourly rates that are available if, for example, a resource is working outside of office hours.

Work Orders Accurately Executed
under **Warranty** and **Agreement Coverage**

Dynamics Customer Location allows you to create physical locations for accounts such as an office building with floors or a large construction site. Customer location is fully integrated into cases, Work Orders and Customer Assets.

A customer location is in a sense different than a Customer Asset. The Customer Asset is 'what' you service as a company and the customer location is 'where' the Customer Asset is serviced. Customer locations can be created in a multi-level structure using a drag & drop designer based on customer location types such as buildings, floors or rooms.

Dynamics Advanced Field Service

a quick overview

Cases

- Service Category, Case Incident Type and Service Category Case Incident Lines
- Complaint, Cause and Solution Codes
- Link Customer Asset and Agreement in Cases
- Detailed information about linked Customer Asset and Agreement
- Automatic Agreement SLA detection
- SLA KPI's Work Order Scheduled, in Progress and Completed
- Show Work Orders created for a Case
- Integration with Customer Locations

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
- Customer Asset Warranty Terms

- Warranty update based on Warranty Start Date of Customer Asset for parent and children
- Customer Asset Structure Designer, Templates & Template Designer
- Customer Asset Properties, Types & Option Sets
- Customer Asset Address
- Customer Asset Statuses
- Integration with Customer Locations

Agreements

- 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
- Load Customer Asset Structure in Agreement
- Easily define SLA's for Customer Asset covered in an Agreement and integrated with Cases
- Agreement ID in Agreement Invoice

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
- Load Work Order Address from Customer Asset
- Manual Work Order Address
- Integration with Customer Locations
- Work Order Fixed Price invoicing using an Invoice Schedule
- Define different Hourly Rates by resource or resource role
- Define Overtime Surcharge for working outside office hours
- Work Order Totals Overview
- Work Order ID in Work Order Invoice

Prerequisite

- Microsoft Dynamics 365 Field Service

Want to know more?

Our Dynamics Apps are sold, implemented and supported worldwide by our industry experts and strategic partners. We are happy to advise you which solution or technology is the best fit for your specific needs. Please feel free to contact us. We appreciate your interest!

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