

# Dynamics 365 Comprehensive Management Suite

The solution pack aims to enhance field service operations by leveraging enhanced plug & play components, advanced technologies and comprehensive solutions. This solution focuses on providing end-to-end services, including consulting, implementation, and managed services, to ensure efficient and effective field service management which emphasize agility and satisfaction in a dynamic market.

Offered Components

## Inspection module

- Setting up of Inspection Groups, Schedules, Inspections
- Include and Exclude rules for Locations / Assets while generating inspections
- Including teams/ users to Inspection Schedules
- Define rules on % usage of Officers from each department
- Allocation of inspections based on the closed location proximity
- Adding / Removal of locations to the existing schedules

## Contractor Management : Full lifecycle Work Orders

- Creation of Work Order from multiple sources
  - Case ( OOTB)
  - Work Schedule (OOTB)
  - Add On – Custom controls for flexible Work Schedules
  - Setup to include / exclude contracts while Schedule creation
  - Static and Dynamic Schedule creation
- E2E process from WO, Assignment, Execution (Per Qty / Monthly Performance), Evidences, Payments, Penalties, Extension of Time, Credit Notes for Contractors
- Check In and Check Out (Manual, Auto – GHS, CFMS)
- Fund Checking, Contract status and amount check
- Trigger Approval based on Configurable Approval Matrix

## ESRI integration with Microsoft Dynamics 365 Field Service

- Seamless integration between applications
- Representation of Map in Dynamics Field Service textual view
- Deep linking between Map App & Microsoft Dynamics 365 App
- Real time integration framework while generating WO, Schedules, Requests from ESRI Map and Microsoft Dynamics 365 CRM
- Shopping Cart

## Budget Management

- Creation of Fund Centers
- Setting multiple Fund Types
- Mapping Cost centers and profit centers to Fund Centers
- Wallet Management under each Fund Center
- Approval Matrix
- Transfer History
- Request external system for more fund (Integration with Financial System if needed)

## Tenders & Contracts

- Creation of Tenders
- Approval process
- Auto creation of Contracts
  - Mapping Active Rates
  - Mapping Pricing based items
  - Mapping Lump sum-based items
  - Setup for Penalties ( Liquidated Damages & Infringements)
  - Setup of EOT Requests ( Extension of Time by vendors)
  - Setup up for performance-based payments
  - Security Deposits
  - Insurance

## IOT to Microsoft Dynamics 365 Field Service & GIS

- API's to leveraged for connecting to Vendor systems
- Situation Awareness to GIS
- Configurable Alert generation Threshold Setup
- Alert mechanism to CRM
- Store evidences (Video Streaming and Photos) in Azure Blob or SharePoint
- Integrate the live video streaming in GIS on Asset Layers

# Benefits of Solution

- 80% time and 45% cost savings by automating key processes like inspections, contract creation, fund management, and work order approvals, improving overall workflow efficiency.
- Greater operational agility and visibility through seamless integration of mapping, IoT, and financial systems, enabling faster responses to changes and challenges.
- Reduced risk of errors and delays with enhanced accuracy in scheduling, contract management, and resource allocation across different operational domains.
- Improved collaboration and resource utilization by linking with various Microsoft 365 native systems like Microsoft Teams, Microsoft To Do, Microsoft Planner, Microsoft Outlook more effectively, ensuring the right people and tools are deployed at the right time.
- 100% financial control and transparency, with integrated budgeting, fund tracking, and payment management systems that ensure compliance and optimize resource allocation.
- Enhanced service delivery and contractor satisfaction by up to 30% through clear performance metrics, automated penalty and payment handling, and real-time monitoring.

