

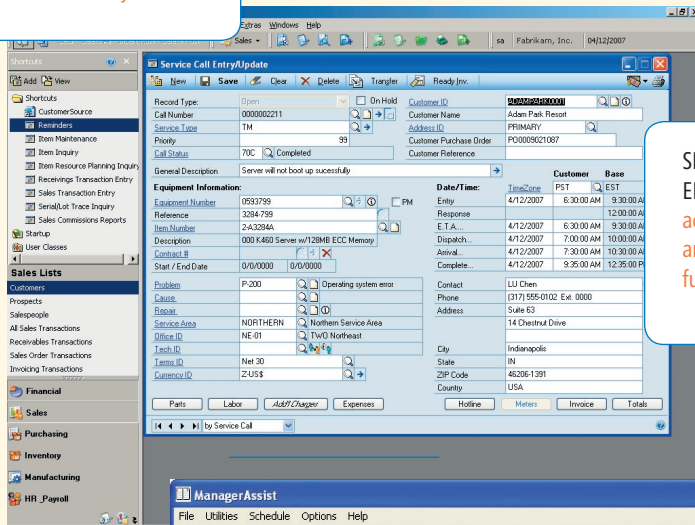
Microsoft® Business Solutions—Great Plains®

FOR FIELD SERVICE

Field Service Management

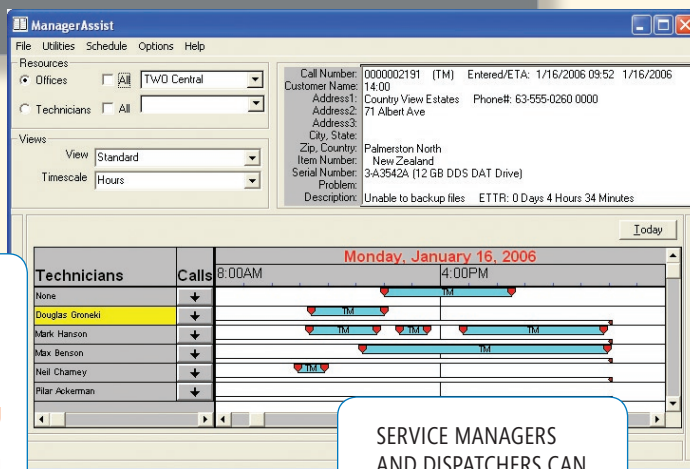
Manage complex field service operations with higher levels of profitability and customer satisfaction. Nine powerful modules integrate essential accounting, distribution, and service processes to increase technician productivity, reduce overhead, and open up new revenue opportunities while focusing on what's important—your customer.

WITHIN A SINGLE USER INTERFACE, provide service managers, dispatchers, and technicians with the information they need.



SERVICE CALLS CAN BE ENTERED AND TRACKED accurately using date and time-stamping functionality.

DISPATCHERS CAN BALANCE WORKLOADS across available field resources by moving assignments and modifying dates and times for service.



SERVICE MANAGERS AND DISPATCHERS CAN VIEW technician schedules at a glance through ManagerAssist.

Microsoft®
Business
Solutions

Increase business productivity

Quickly adjust technician scheduling, change repair priority levels, and execute change orders. Coordinate regular preventive maintenance to reduce redundant visits, and easily manage complex contracts.

Share information

With easy and accurate access to a vast array of information, organizations can provide customers with first-class service, while ensuring the right technician is dispatched with a complete history of the customer.

Increase customer satisfaction

Improve customer service and reduce costs with Web-based tools that let customers resolve service issues themselves, log service requests, check repair status, monitor returns, and enter their own meter readings.

Make quick, intelligent business decisions

Use standard and customized reports to track detailed costs for parts and labor, monitor returns and repairs for parts, and analyze technician workload and deployment.

Increase service profitability and customer satisfaction

Microsoft® Business Solutions for Field Service Management integrates with the superior business and financial capabilities of Microsoft Business Solutions—Great Plains®, offering a customer relationship management (CRM) solution that enhances your organization's ability to use information strategically and provide exceptional customer satisfaction.

Field Service Management

FEATURES OVERVIEW

Service Call Management

- Create new and track historical service calls.
- Assign appropriately skilled technicians and escalate calls automatically.
- Track parts, labor, and expense details.
- Manage spare parts and trunk stock inventory.
- Generate standard and customized reports to track profitability and analyze parts failure, technician utilization, and workload.
- Automate generation of customer invoices.
- Update service call details including parts and labor usage, expenses incurred, and additional charges levied.
- Monitor customer billing or tracking of service call costs against a customer contract (service agreement) or equipment warranty.
- Gain deep visibility to supporting documents such as service level agreements, parts Returns Material Authorizations (RMAs), parts inventory transfers and parts purchase orders.

Contract Administration

- Create customer quotes for multiple service levels and options, and then convert quotes to contracts with a single click.
- Maintain unlimited contract price books to automate your complex contract pricing.
- Monitor profitability against pricing options.
- Renew contracts by re-pricing and then reissuing them.
- Ensure accurate billing and compliance with service agreements through integration with Service Call Management.
- Utilize contract options and response times to provide customers multiple levels of service agreements.
- Bill customers based on time or meter usage.
- Recognize revenues through five different methods: straight-line, metered, based on calls, block time or retainage.

Field Service Management

FEATURES OVERVIEW

Returns Management

- Perform automated checks for returns of the same item to identify potential problems.
- Track repair and return status to provide customers with accurate, current information regarding the repair or return of parts and equipment.
- Accurately credit customers based on the original sales invoice.
- Generate customer RMAs from historical customer invoices, service calls or manually.
- Meet customer and vendor requirements for product and part returns, regardless of type, with credit on account, replacement item, cross ship replacement, or repair of items.
- Built-in workflow management allows for a separate RMA item receiving process and RMA closing process.
- Generate RTVs or Depot work orders with a single mouse click.
- Automatically transfer Return to Stock items from the returns warehouse to the main warehouse.

Preventive Maintenance

- Forecast purchasing and scheduling requirements based on time in service or actual product usage.
- Coordinate open service requests with upcoming preventive maintenance calls.
- Automatically generate scheduled field service visits based on time in service or equipment usage (metered equipment).
- Track details of Preventive Maintenance activities, including site visits, cancellations and work in process.

Depot Management

- Prioritize and schedule internal repair operations.
- Enter and automatically schedule work orders through the workbenches or stations in your internal repair facility.
- Integrate with Returns Management for consistent tracking of customer repairs.
- Enable depot technicians to record and track parts and labor usage during the repair process, including requesting back-ordered parts if needed.
- Roll repair costs into items cost or expense them.

Field Service Management

FEATURES OVERVIEW

ManagerAssist

- Access a real-time view of open service calls and technician in a graphical environment with drag-and-drop rescheduling capabilities.
- Balance workloads throughout the day or week.
- Page technicians for immediate notifications of schedule changes.

eTech

- Access and update service call details from the field through any connected client, via an intuitive Web-based interface that reduces training requirements and provides flexible access options.
- View and update schedules, expense reports and indirect labor entries while on the road, reducing unnecessary trips to the office or calls to a call center representative.
- Initiate new service requests from the field, reducing the need to contact the office.
- Full integration with Inventory enables easy viewing of quantities on-hand in trunk stock, as well as stock available across the organization.
- Record and track readings for metered equipment to help improve billing efficiencies and revenue recognition based on usage.
- Expedite site visits by displaying customer locations online via Microsoft Office MapPoint®.
- Print service tickets on site so that customers can review and sign off on work performed before an engineer leaves.
- Record detailed service call notes and track pre-established problem, cause, and repair codes while in the field, reducing errors and providing a more complete audit trail of work performed.

Tech Assist

- Manage calls from any location with two-way synchronization that allows technicians to log, receive, and update technical information using their laptops.
- Update service calls while disconnected, including all parts and labor usage, expenses incurred, and additional charges.
- Make full use of client-based Service Call Management capabilities in the field.

AVAILABLE WITH:

GREAT PLAINS

GREAT PLAINS STANDARD

Field Service Management

Microsoft
Business
Solutions

FEATURES OVERVIEW

eService Calls

- Help reduce call center contacts by allowing customers to view and update open service requests.
- Customers can conduct knowledge base searches, submit new service calls, view historical service calls, and enter meter readings.
- Help ensure 24/7 support for customers with a self-service Web interface that includes keyword search capabilities.
- Provide customers with historical service request details and the ability to generate reprints of historical invoices at their convenience.

eReturns

- Provide customers with easy online access to information and processes for returning products and parts.
- Allow customers to initiate the creation of an RMA online at their convenience, without tying up your customer service personnel.
- Help reduce call center contacts by allowing customers to view the status of open RMAs online.