Optimizing Field Service Efficiency for a Company with Dynamics 365

inogic

Business Challenges

A leading utility company faced significant operational challenges with its field service management. Inefficient scheduling and dispatching of field technicians resulted in increased response times and customer dissatisfaction. Manual processes and disparate systems made tracking work orders, and providing timely updates to customers difficult. The lack of real-time visibility into technician activities and job status led to missed appointments and inefficient resource utilization.

Solution

To address these issues, we implemented and enhanced Microsoft Dynamics 365 Field Service with the following improvements:

Multiple Agreements and Booking Setup Functionalities

Enabled customers to create multiple agreements and booking setups for the same service account. Users could associate asset categories with specific agreements or booking setups, streamlining service management.

Custom Tax Calculation Functionality

Developed custom logic for tax calculations on agreements, opportunities, quotes, orders, and invoices, ensuring accurate and compliant billing.

Custom Auto-Numbering

Implemented auto-numbering to automate and standardize document numbering across the system.

Microsoft Dynamics 365
Field Service

Enhanced Field Service Mobile App

Customer Asset Exchange/Transfer Functionality: Allowed for the exchange or transfer of customer assets between accounts.

Time In/Out Functionality: Added a Time In/Out button to the booking grid, enabling technicians to record their start and end times easily.

Barcode Search Scan Functionality: Enabled users to search related work order incidents by customer asset name using barcode scans.

QR Code Scanning Functionality: Implemented QR code scanning on the customer asset form to automatically populate model and manufacture dates from the barcode.

Signing Authority Management: Facilitated the management of authority signatures within the system.

Custom Reports for Web and Mobile App

Designed tailored reports to meet specific needs for both web and mobile applications, providing actionable insights and improving decision-making.

Conclusion

The implementation of Microsoft Dynamics 365 Field Service significantly enhanced the utility company's field service operations. By optimizing scheduling, providing real-time visibility, and streamlining inventory management, the company improved response times, customer satisfaction, and overall operational efficiency. The enhanced mobile app capabilities empowered field technicians, leading to better resource utilization and higher service quality.

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