




Field Services

Field Services for Microsoft Dynamics™ AX



*Integrate people,
information,
and resources to
empower your
workforce*

- **End-to-end management of field and office operations**
Automate and tightly integrate diverse business processes to better understand and manage field service performance, productivity, and profitability.
- **Improved insight for optimal scheduling and dispatch**
Understand service urgency and resource status, and match the best resources to every task to reduce response times, lower costs, increase customer satisfaction, and boost profitability.
- **Automated processes that streamline the work order life cycle**
Enable rapid-response call taking and speed work order creation, assignment, dispatch, closure, and invoicing while eliminating manual processes, redundant data entry, and unnecessary paperwork.
- **Real-time access to critical information**
Connect office and field staff, and enhance the flow of business and technical information throughout the organization with the convenience of Microsoft® Windows Mobile® devices.
- **A solution tailored to your unique business needs**
Use the terminology, equipment, and processes that make sense for your business, and easily accommodate growth with a flexible Web services foundation, a set of agile tools for customization, and tight integration with other Microsoft or third-party solutions that can extend innovation throughout your business.

Improve field service efficiency and profitability

Efficient coordination and management of field operations can be a challenge. Too often, intellectual capital and know-how reside in just one or two experienced people, leaving the organization at substantial risk of chaos if the unexpected occurs. Manual processes, dispersed personnel, uninformed dispatch decisions, inconsistent work practices, and volumes of often redundant paperwork hinder efficiency and drag down both customer service and profits.

While many businesses already enjoy the efficiencies of enterprise resource systems and supply chain automation, additional gains in those areas become a game of diminishing returns. Field service operations, however, represent a final frontier where streamlined processes, targeted automation, and integrated information flow can dramatically enhance productivity, operational insight, and effective management. Field Services for Microsoft Dynamics™ AX can take you there today.

The payoffs include lower response times and costs, higher first-time fix ratios and revenues, and greater customer satisfaction, which all help you build a competitive advantage.

A close-up photograph of a woman with blonde hair, looking down at a document or tablet. The image is partially obscured by a dark blue horizontal bar at the bottom, which contains the word 'EMPOWER' in white capital letters.

EMPOWER

Features and functionality include:

- **Call center and dispatch management**
- **Contract and service level agreement (SLA)**
- **Work order generation, assignment, tracking, and reporting**
- **Resource scheduling and timekeeping**
- **Asset, inventory, and field service parts management**
- **Service order visibility and self-service request capability for customers**
- **Support for Windows Mobile devices**
- **Robust business intelligence and reporting**

Streamline and integrate field service operations

Timely information is critical to managing field services effectively. Diverse and far-flung data, including customer needs, contract requirements, available personnel and their skills, equipment resources, parts inventories, best practices, and technical or schematic information all must be drawn together in the ideal combinations for fast, cost-effective customer service.

Field Services for Microsoft Dynamics AX efficiently integrates this spectrum of operational information, presents it in the intuitive and flexible formats you choose, and provides the tools you need to quickly understand and respond.

Take control to optimize processes and resources

Manage performance and gain insight into your operations with the flexibility to respond to changes by integrating your field services operations from one end to the other. Automate work order generation, assignment, tracking, closure, and billing, and improve insight into service call status, resource productivity, costs, and profitability. Automating manual processes, including work calendars and resource tracking, can reduce paperwork while streamlining data entry, minimizing errors, and improving the accessibility and security of important information.

With Field Services for Microsoft Dynamics AX, your business can capture relevant information about customers, work sites, service activities, equipment, and technical specifications. Track work over time and improve visibility into day-to-day operations to spot opportunities for improvement or growth. With integrated field and back-office processes, you can speed work order closure and invoicing for improved cash flow.

CONTROL

Manage personnel and resources efficiently

Save time by assigning tasks for best fit. Quickly assess personnel and resource availability and optimize work order assignment for best fit based on skill sets, experience, and routing. Incorporate detailed information about equipment, vehicles, and subcontractors, and draw upon dynamic records of crew qualifications, certifications, and experience with a given customer, site, piece of equipment, or problem type.

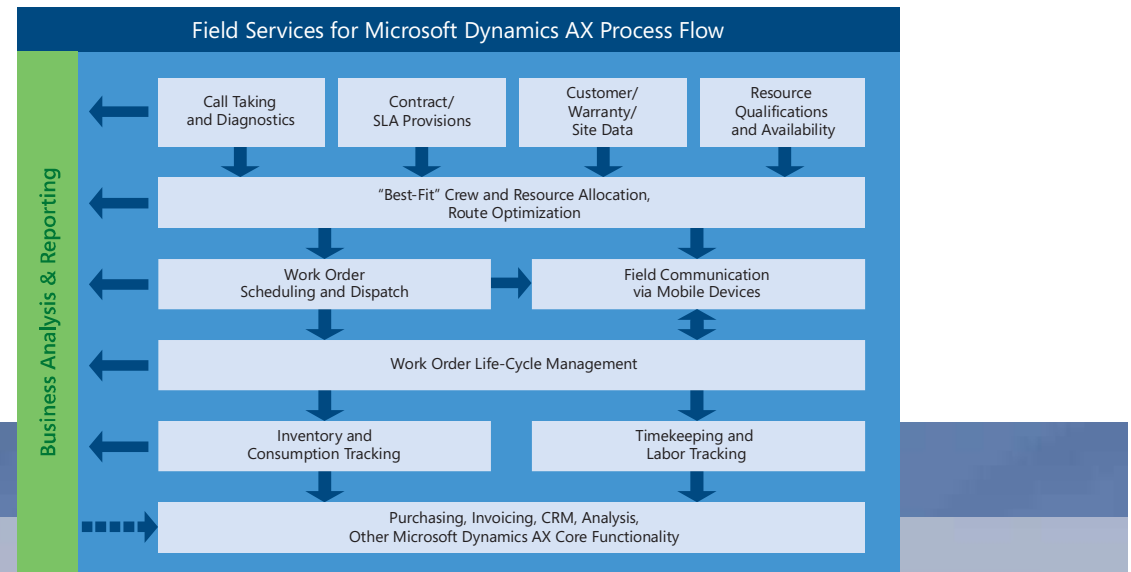
With such rich information to draw from and convenient drag-and-drop tools to quickly link work orders to resources, dispatchers can make faster, more effective scheduling decisions that keep costs down and serve customers better. You can also manage resources from either supply or demand perspectives. Handle schedules daily or weekly, and by project, technician, or site. By establishing sequential dependencies among resources and work orders, you can maintain them throughout the completion of work.

Reduce response times to enhance customer satisfaction

Field Services for Microsoft Dynamics AX can help you shorten the time between receipt of a service call, job completion, and billing. Quickly convert customer requirements to a work

order, service order, or trouble ticket with the appropriate urgency. Look up customer or asset histories and contract or SLA provisions, and automatically generate work orders for periodic or preventive service visits.

With color-coded alerts and automatic escalation features to help track the most urgent needs, you can address them promptly. Then, by tracking work status and the location of resources in real time, you can provide customers with more accurate estimates of arrival times or work completion.





INTEGRATE

Put critical information at the fingertips of those who need it

Empower real-time information exchange between sales, office staff, field personnel, and customers. Field Services for Microsoft Dynamics AX can help your business support hundreds of dispatchers at multiple locations with built-in call center tools, or integrate smoothly with third-party customer relationship management (CRM) or call center systems to capture diagnostic information immediately and provide instant access to customer, equipment, contract, and job site information.

Field technicians can access site information, technical information, schematics, and best practices through their Windows Mobile devices, helping them to conveniently locate the exact job area and equipment at complex customer sites to provide exactly the right service. In addition, procedural or safety checklists can be incorporated into work assignments to increase first-time fix ratios, ensure correct handling of critical components or tasks, and build service consistency. New priorities and important safety or policy updates can be instantly communicated to field staff to avoid potentially serious delays.

Gain insight into business performance and potential opportunities

Gain the insight you need to maintain your focus on business priorities while being able to shift those priorities when new opportunities present. For example, real-time, accurate comparisons and forecasts can help you reduce costly write-offs with greater control over material and service parts inventories in multiple locations, including items in trucks and purchases made en route to service. Based on more up-to-date inventories and scheduled activities, you can take advantage of bulk purchases and just-in-time replenishment. Field Services for Microsoft Dynamics AX also helps provide robust reporting capabilities, including queries made to OLAP cubes that analyze up-to-date information for utilization rates, resource productivity, financial performance, and business trends. With detailed historical information and access to contract commitments, you can plan for the future and build better predictability into your business. For example, you can confidently offer customers fixed-cost contracts based on reliable information about costs and labor requirements, enhancing service offerings while protecting the bottom line.

Efficiently manage complex contracts and assets

Organize complex contracts and SLAs with a hierarchical structure that makes it easy to understand tiered client relationships or obligations and track work against them. With Field Services for Microsoft Dynamics AX, you can clarify payment responsibilities and streamline billing for interrelated or overlapping service agreements. Revenue opportunities that might otherwise be overlooked can be captured by recording and managing contract terms and conditions, including different billing rates for various types of work and materials. Field Services for Microsoft Dynamics AX can automatically generate orders for contractual, preventive, or regularly scheduled service and help you collect full payment of tiered pricing agreements with automatic escalation for time-sensitive commitments.

Maximize asset value by using barcodes or serial numbers to identify and classify assets. Then create individual or hierarchical asset records, track manufacturer and vendor warranties against assets, and manage reliable maintenance, location, and repair histories to improve planning and streamline future service.

Adapt to your business needs and changing circumstances

Work with the familiar terminology and processes of your business rather than imposing a one-size-fits-all solution. With Field Services for Microsoft Dynamics AX, you can tailor your solution to fit back-office systems and accommodate unique needs, such as specific monitoring devices and data collection systems. Easy-to-use and agile tools make confi-

guration easy, while an open Web services foundation and full compliance with the Microsoft .NET Framework permit ready customization using familiar development tools such as the Microsoft Visual Studio® .NET development system.

Implement the solution across multiple locations and time zones, and scale seamlessly to support thousands of field service staff as your business grows. Incorporate any Windows Mobile device, including Pocket PCs, Pocket PC Phone Editions, Tablet PCs, and Smartphones. Or, tailor mobile applications as needed to support complex devices and multiple carriers by using Microsoft Office InfoPath® 2003 and the Microsoft .NET Compact Framework.

ADAPT

Field Services Functionality

Call Center Management

Call Taking

Resource Management & Scheduling

Best-Fit and Route Optimization

Dispatch

Work Order Generation

Operations

Work Order Life-Cycle Management

Labor & Materials Planning & Consumption

Mobile Field Communications

Fleet Asset Management

GPS Tracking

Project Management

Sales, Contract, SLA Management

Maintenance Scheduling

Pricing Engine

Warranty Asset Management

Field Staff Management

Resource Scheduling

Certifications, Skills

Performance Scorecards

Microsoft Dynamics AX Core Functionality

Business Analysis

Enterprise Portal

Supply Chain Management

Customer Relationship Management

Human Resource Management

Financial Management

Boost profitability and gain control for a competitive advantage

Finally, integrate all aspects of your field service operations with an end-to-end solution that addresses the needs of both office and field staff and of management, providing the targeted tools and functionality that field service industries require while connecting smoothly with your enterprise management system. Streamline formerly labor- and paper-intensive processes from call intake through resource scheduling, assignment, dispatch, and completion. Then capitalize on more accurate, timely information and communication to help improve every aspect of field services productivity and profitability.

Field Services for Microsoft Dynamics AX makes ongoing business improvements possible and unlocks opportunities for a high return on investment (ROI) while keeping you poised to integrate future innovations smoothly into your applications and solutions.

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



Benefit from power and flexibility backed by support you can trust

The reliability, connectivity, and performance of this comprehensive solution are backed by Microsoft quality assurance and support. To provide high quality and excellent value, Field Services for Microsoft Dynamics AX has been reviewed by Microsoft internal development and quality assurance staff and is supported by Microsoft Dynamics Support Services globally.

Technical review prior to launch and throughout the product life cycle helps to ensure greater overall quality, performance management, and stability through service packs or major releases. And you can count on the overall assurance of receiving support for your entire solution from one place, rather than having to contact different people and organizations for different support needs.

Gain faster ROI and lower your TCO

Field Services for Microsoft Dynamics AX uses proven Microsoft technologies to facilitate smooth deployment, a familiar user experience, and tight connections with existing IT investments. The solution builds on powerful products such as Microsoft SQL Server™ 2000, Microsoft Internet Information Services 6.0, Microsoft Windows® SharePoint® Services, Microsoft Office system programs, and the Microsoft Windows operating system. With reliable, one-stop help from Microsoft Dynamics Support Services, your company can upgrade smoothly and receive quick answers to your support queries. Together, these features can help you achieve a quicker payback cycle, a healthier ROI, and lower total cost of ownership (TCO).

PERFORM

Deliver real business results

A study by Nucleus Research, Inc. showed that 75 percent of Microsoft Dynamics AX [formerly known as Microsoft Business Solutions—Axapta®] customers gained a positive ROI from their deployments, with an average payback period of only 23 months.¹

Participating companies attributed these strong returns to:

- **Staff reductions or redeployments resulting from increased productivity.**
- **Reduced IT costs, especially when replacing outdated or expensive mainframe systems.**
- **Improved customer and partner satisfaction when business and order information can be made visible and accessible directly to trading partners.**
- **Improved operations and visibility resulting from end-to-end business integration and streamlining for productivity gains and faster delivery times.**

The ability to tailor industry-specific functionality was also cited as a factor in maintaining low TCO.

Value Opportunity	Range	Enabler
IT maintenance and support costs	Reduce by up to 40%	Improved ease of use; reduction in systems management requirements and in-house support; reduced maintenance and upgrade costs
Order lead times	Reduce by up to 35%	Better visibility of on-hand and in-process inventory; more efficient production; shelf life management and first expired/first out (FEFO) inventory management
Work-in-process inventories	Reduce by up to 30%	Reduced production cycle times; increased utilization; improved routing and scheduling accuracy
Obsolete, expired, or perishable inventory	Reduce by up to 30%	FEFO inventory management, shelf life management
Changeover and setup times	Reduce by up to 20%	Better order sequencing and batch management; improved visibility of production setup and changeover requirements
Finished goods inventory	Reduce by up to 25%	Overall reduction in cycle times; improved order accuracy and forecast accuracy
Planning cycle time	Reduce by up to 80%	Weekly, daily, and hourly supply/demand netting; what-if planning and simulation; improved granularity of resource constraints by formula, dimension, or other attributes
Forecast accuracy	Improve by 5 to 15%	More complete and accurate order data; integrated forecast netting against inbound orders and rework orders
Temporary labor requirements	Reduce by up to 25%	Greater visibility of actual production requirements; improvement in planning accuracy

*Results as compared to manual processes, market survey analysis, and customer results.

¹ Nucleus Research, Inc. The Real ROI from Axapta. *Research Note E116*, October 2004.

Microsoft

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Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

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