



Client Solution Case Study

Erosion Control Company Replaces Manual, Error-prone Processes with Streamlined Field Service Solution

A photograph of a yellow excavator at a construction site. The excavator's bucket is positioned over a large pile of dark, reddish-brown rocks. The background shows a clear sky and a distant horizon line.

MICROSOFT DYNAMICS 365
FIELD SERVICE

Mounds of Paper

An erosion control company was drowning in mounds of paper-based processes leading to inaccurate billing and payment delays. Every morning, paper-generated schedules were printed for foremen to take into the field and field work. They had to stop by the office, pick up work orders, load the necessary materials, and complete the work—an inefficient, error prone process. They would then track labor, materials, and completed jobs on another piece of paper. At the end of the day, they were supposed to stop back by the office to report what they completed, but oftentimes the paper was lost or didn't arrive back at the office for several days. Sometimes the foremen would have to physically go back to the site to take photos of what work was completed. If the paper made it back, the accounting team would approve the work order and hand deliver the information to billing. Materials would have to be manually entered onto a sales order in the Microsoft Dynamics SL accounting system (support for which is being discontinued). Many phone calls were made between the back-office staff and field to complete the billing cycle.

Third Time's a Charm

A long-time Microsoft shop, the erosion control company had tried and failed twice to implement Microsoft Dynamics 365 Field Service with other partners. The team decided to give it another try with Microsoft partner Velosio. The challenge: present an electronic version of what the field foreman needs electronically at the touch of a button. Velosio built a mobile app for Microsoft Dynamics 365 Field Service so that the foreman could open the work order on a tablet, with materials and labor included. They would enter the information, save it, and send it back to headquarters.

Implementation

During implementation, the technology itself was challenging in that the foreman needed to be able to enter information into a mobile app when there was no cell coverage. It was necessary for data to be stored and then uploaded once they entered back into cell range. Data integration between Microsoft Dynamics 365 SL and Microsoft Dynamics 365 Field Service was also on the requirements list. Custom processes were written to convert data from the field into usable data in the SL billing system.

Streamlined Processes

The erosion control company now has an automated end-to-end process. The materials sheet uploads from the dispatch team every day, coordinating the foreman, crew, and materials. Warehousing in SL is now automated, eliminating delays and inaccuracies. Billing is streamlined and accurate, boosting revenue. Work quality is much improved with better information flow. Now, when a foreman completes a job, they can snap photos of the completed work, and information is synched back to the work order, so that completed work is documented. The automated, streamlined, integrated process saves time and money for the company.

Project Benefits

1. TECHNICIAN MANAGEMENT

For repairs or maintenance that require technician-specific skills, Dynamics 365 Field Service helps organizations direct the right technician for the job. The solution can link issues to skills, identify technicians who have the necessary skills, and direct the person to perform a particular job. Such management not only improves first-time fix rates;

it also helps organizations complete more service calls per technician per week.

2. OPTIMIZED SHIFTS

Dynamics 365 Field Service delivers a smart, responsive routing system that helps service agents optimize their travel and shifts while ensuring all their goals are met in time. This advanced routing mechanism includes location data based on the customer or equipment that needs attention, allowing you to increase the efficiency of your agents while also reducing factors like travel time, mileage, and vehicle wear and tear.

3. CENTRALIZED SCHEDULING

A centralized scheduling system is also an impressive feature offered by Dynamics 365 Field Service. Using this system, you can schedule visits according to customer convenience, assign the right tasks to the right service agents, and communicate accurate arrival times to customers. The easy-to-use mobile application guides technicians through schedule changes and service work and allows them to efficiently manage tools and resources needed for each field visit.

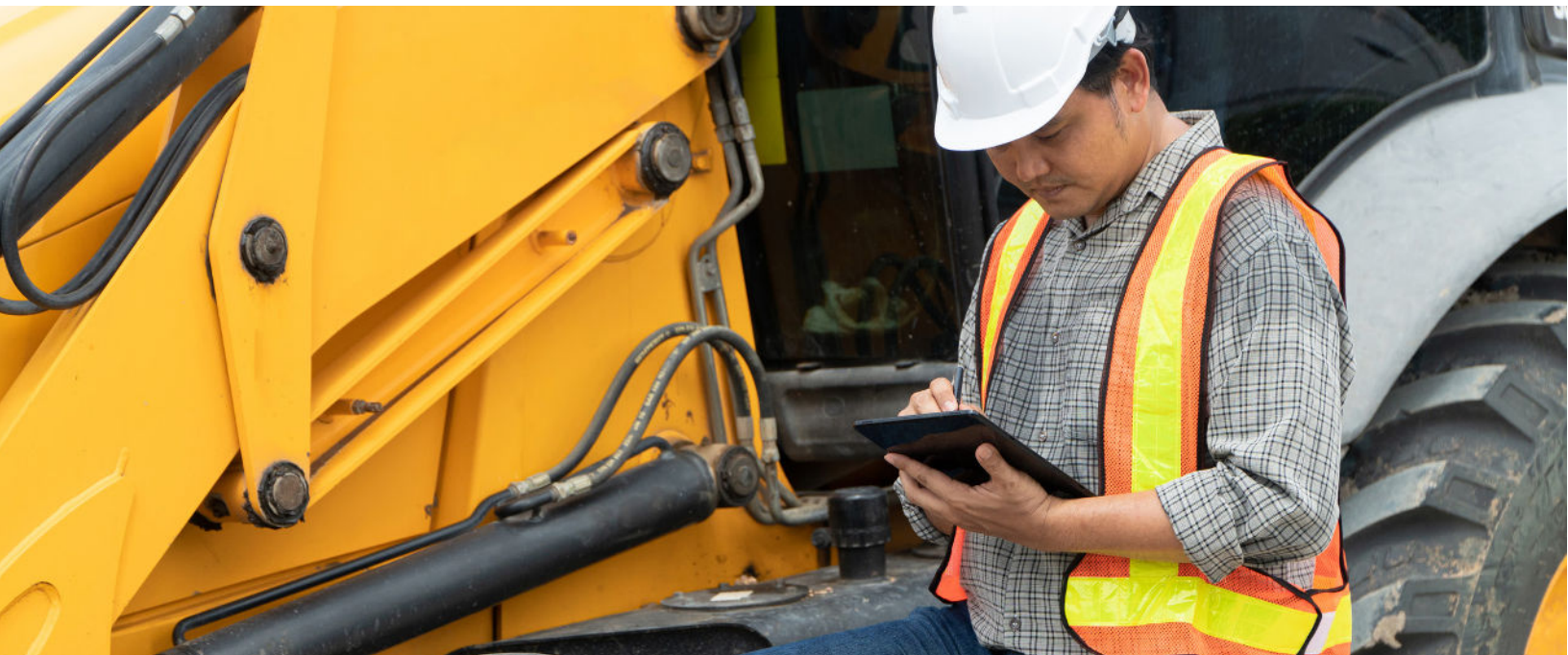


4. EASY INTEGRATION

With a platform such as Dynamics 365 Field Service, you can easily integrate the platform with a host of other Microsoft solutions and services to extend capabilities. Since Dynamics 365 Field Service is natively integrated with other existing Microsoft solutions, you can enable full exchange of information between different to drive unify user experience and boost efficiency.

5. REAL-TIME INSIGHTS

Dynamics 365 also offers technicians and field service agents complete information about issues, customers, and routes. Such real-time insight allows them to get a 360-degree view of customer priorities, optimize routes based on traffic or weather conditions, and keep customers updated with the status of their service call.



Discover how Velosio can help your business with Microsoft Dynamics 365 business applications.

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