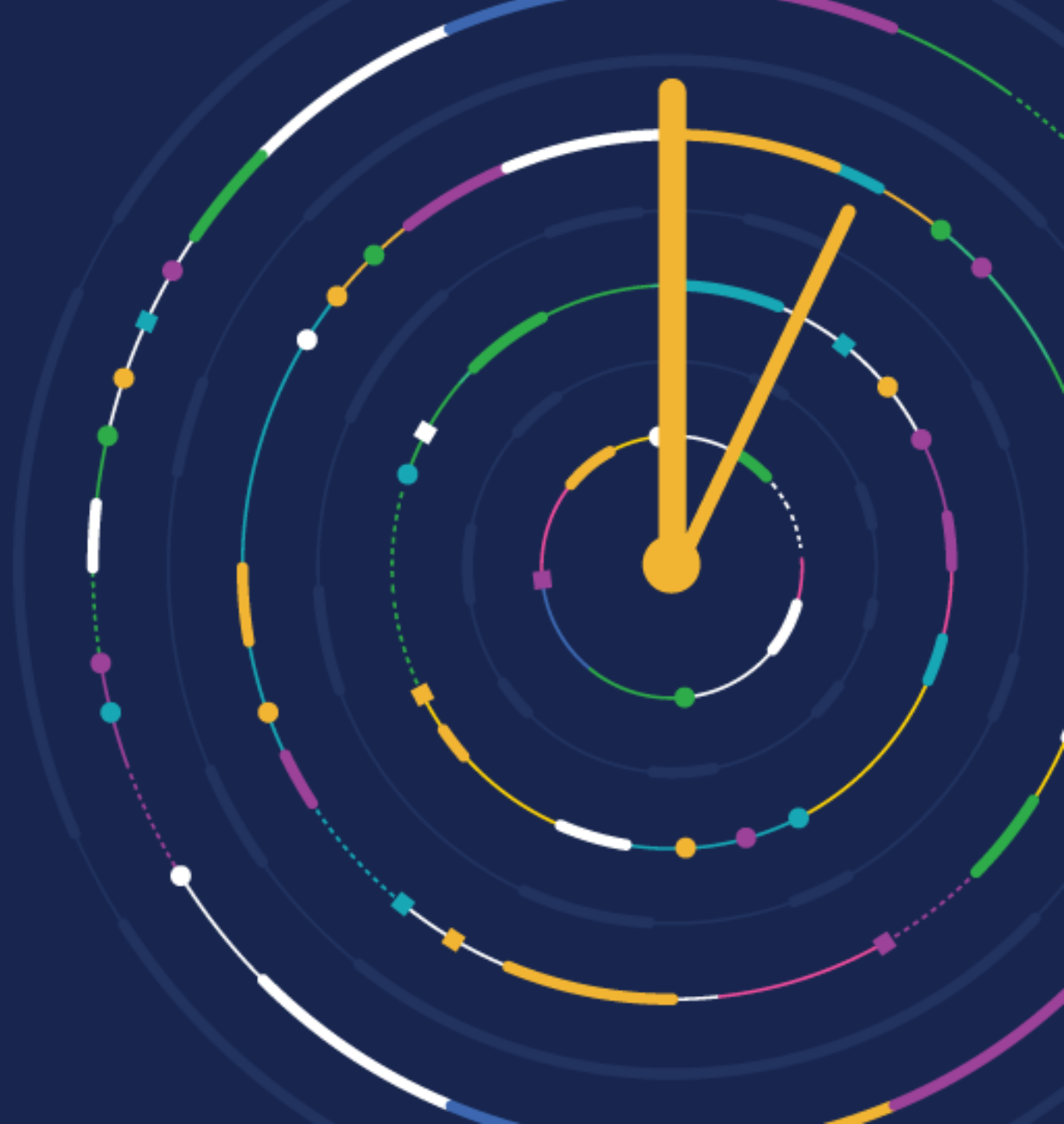


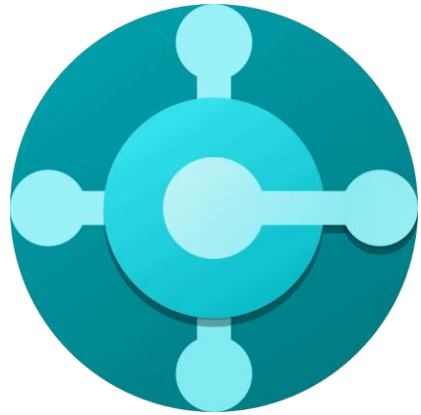


Business Central & Service Management - understand all the options, all in one go

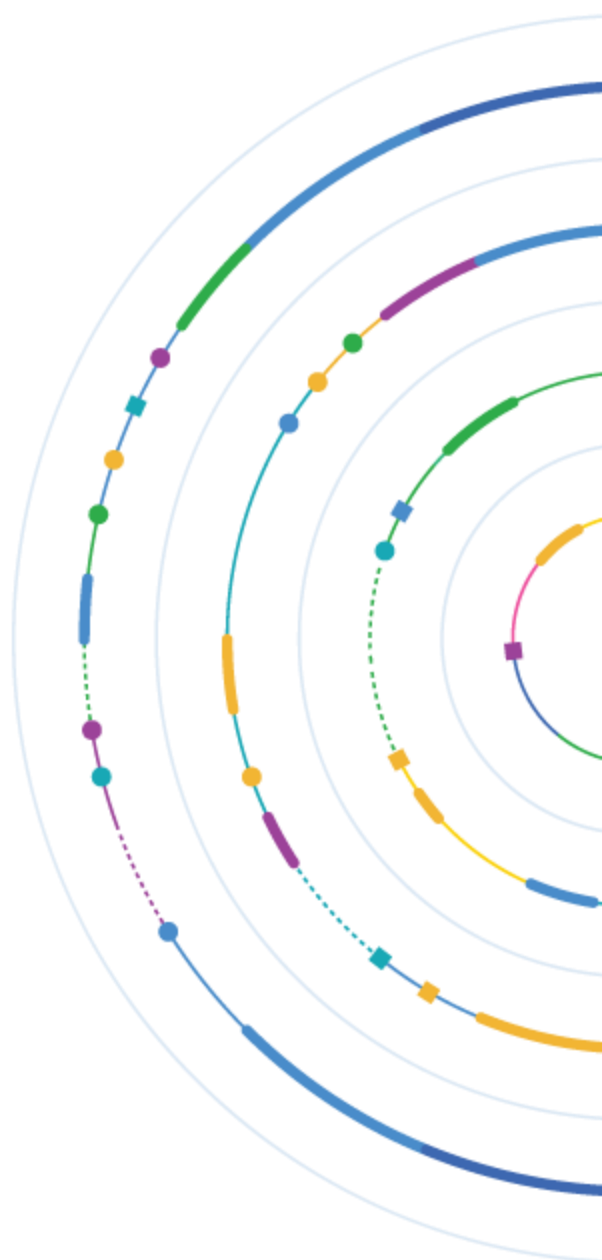
Craig Smith

CUSTOMER DAY 2023





Service!



eo

BC

- Service Items
- Service Contracts
- Service Orders

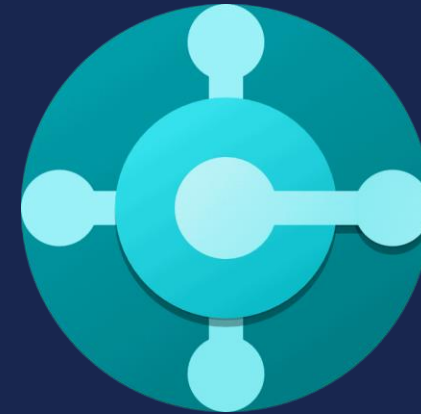
Dime

- Resources
- Tasks (Service Orders)
- Scheduling
- Map

Anveo

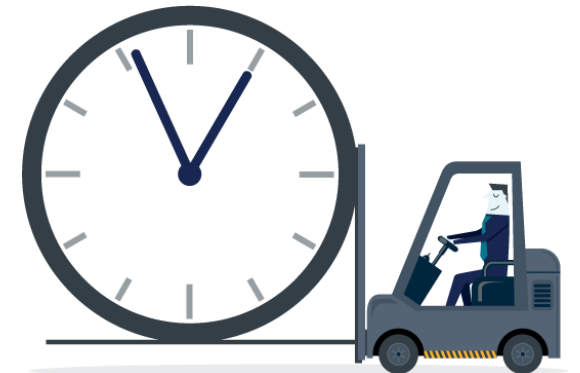
- Field Service
- Customisable
- Offline

Business Central



BC – Service Management

- Service Items
 - Represent a unique physical Item you can record service on
- Service Contracts
 - To handle Maintenance and billing
- Service Orders
 - To record the Service actions, Items used and labour time.
 - Post to make an invoice for billing



Service Items

- Can be created manually, but can also be created from a Posted Sales Order
- Use Service Item Group field on Items

Select - Service Item Groups | 🔍 ⌵ + New 🗑 Edit List ... ↗ ✕

Code ↑	Description	Default Contract Discount %	Default Serv. Price Group Code	Default Response Time (Hours)	Create Service Item
→ STD	Standard			24	<input checked="" type="checkbox"/>

- When the Sales Order containing that item is sold, the Service Item is created
- Can auto assign Warranty based on Standard setup or Item Tracking Code



Service Contracts

- Add Service Items to Contracts
- Can set Maintenance on a repeating frequency, and batch processes can automatically create Service Orders for those Maintenance visits
- Can set up billing on the contract Monthly, Bi-Monthly, Quarterly, Bi-Quarterly or Annually



Set up your contracts and run batch processes to automate

Create Contract Service Orders



Options

Starting Date

Ending Date

Action Create Service Order

Filter: Service Contract Header

× Contract No.

+ Filter...

Filter totals by:

+ Filter...

Filter: Service Contract Line >

Create Service Contract Invoices



Options

Posting Date

Invoice to Date

Action Create Invoices

Filter: Service Contract Header

× Bill-to Customer No.

× Contract No.

+ Filter...

Filter totals by:



+ Filter...

Service Orders

Fault Area Code	<input type="text"/>	▼
Symptom Code	<input type="text"/>	▼
Fault Code	<input type="text"/>	▼
Resolution Code	<input type="text"/>	▼
Repair Status Code	NEW	▼

- Planned in advance (created from Contract) or Ad-Hoc (created manually)
- Can track Symptom, Faults, Resolutions
 - Great for Reporting on Manufacturing issue
- Repair Statuses allow tracking of Service States (and work great with Dime)



 New Line  Delete Line

Type	No.	Description	Location Code	Unit of Measure Code	Quantity	Unit Price Excl. VAT
Cost	START	Callout Charge		PCS	1	100.00
→ Item	⋮ SP-BOM1107	Circuit board	MAIN	PCS	1	0.00
Item	SP-BOM1105	Switch on/off	MAIN	PCS	1	0.00
Resource	TERRY	Terry Dodds		HOURL	3	100.00
		Comments!			0	0.00

- Call out fees, Spares consumed, labour time and comments



Dime Scheduler



Scheduling

The screenshot displays a scheduling software interface with the following components:

- Task List (Left Pane):** A table listing tasks with columns for Job No., Task No., Task Description, and Task Importance. Tasks are grouped by Customer Name (Customer 2 and Customer 3).
- Map (Bottom Left):** A map of Vienna, Austria, showing various districts and landmarks.
- Resource List (Middle Pane):** A list of resources categorized by type: CAR (Car 1, 2, 3), Lift (Lift for Furniture), and Person (Alex Turner, Damon Albarn, Hendrik Bulens, Johnny Mar, Liam Gallagher, Linda Martin, Mark Hanson, Mary A. Dempsey, Noel Gallagher, Richard Ashcroft, Timothy Sneath, Tom Taffin, Volker Schmieder). Each resource has associated task IDs and customer information.
- Gantt Chart (Right Pane):** A calendar view for Week 44 (October) showing task assignments for each day (Mo-Fr). Tasks are represented by colored bars indicating duration and resource allocation. For example, Car 1 is assigned to maintenance on Oct 26-29, and Alex Turner is assigned to tasks on Oct 26, 27, 28, and 30.



- Orders can be easily replanned to new time or different resource
- Planned Orders can be grouped or split
- Categories, linked to Service Order Types
- Timemarkers, linked to Repair Status, can be used to give real-time feedback of an order status (linked to a mobile device – See Anveo)

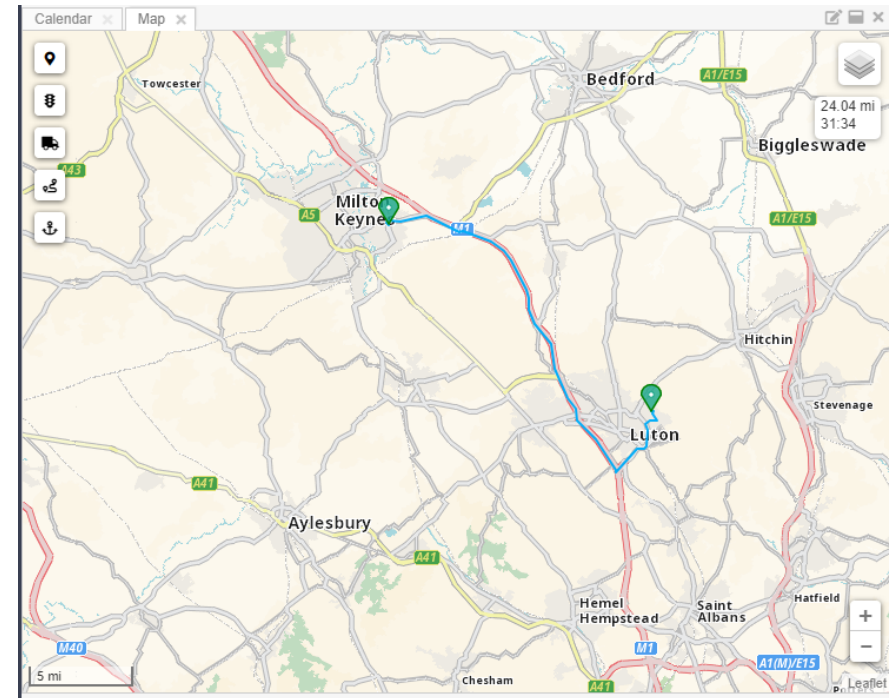
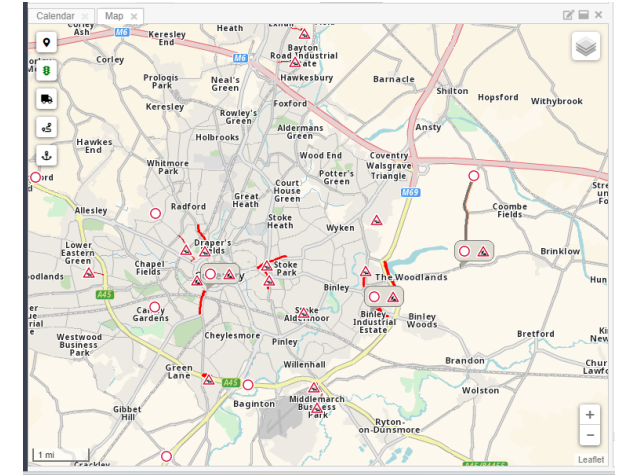


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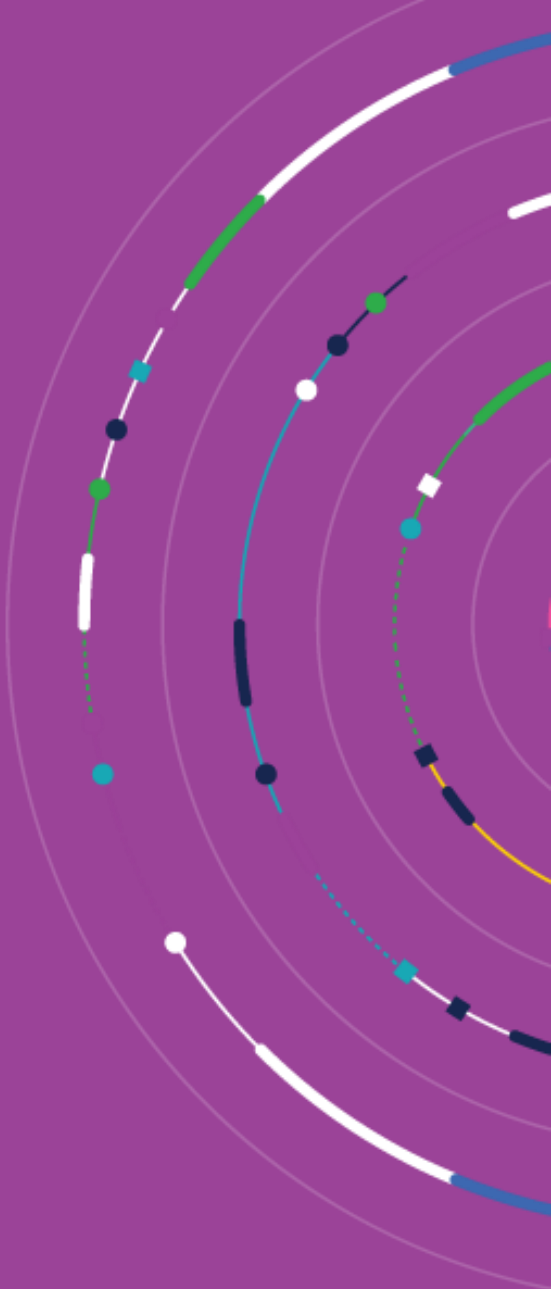


Mapping

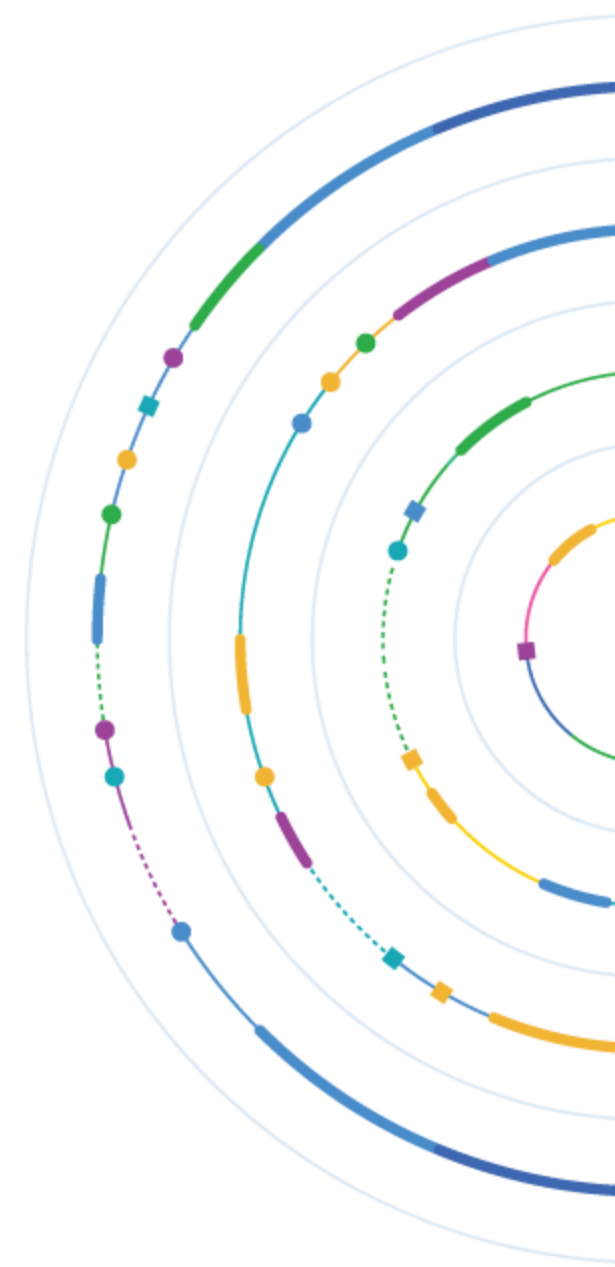
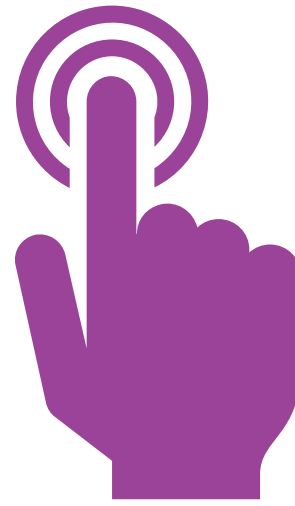
- Map can plot Orders, Resources and Fixed Locations
- Can plot multiple entities into a route with distance and travel time tips
- Can show up to date traffic info



Anveo



DEMO





QUESTIONS





THANK YOU

CUSTOMER DAY 2023

