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

Craig Smith

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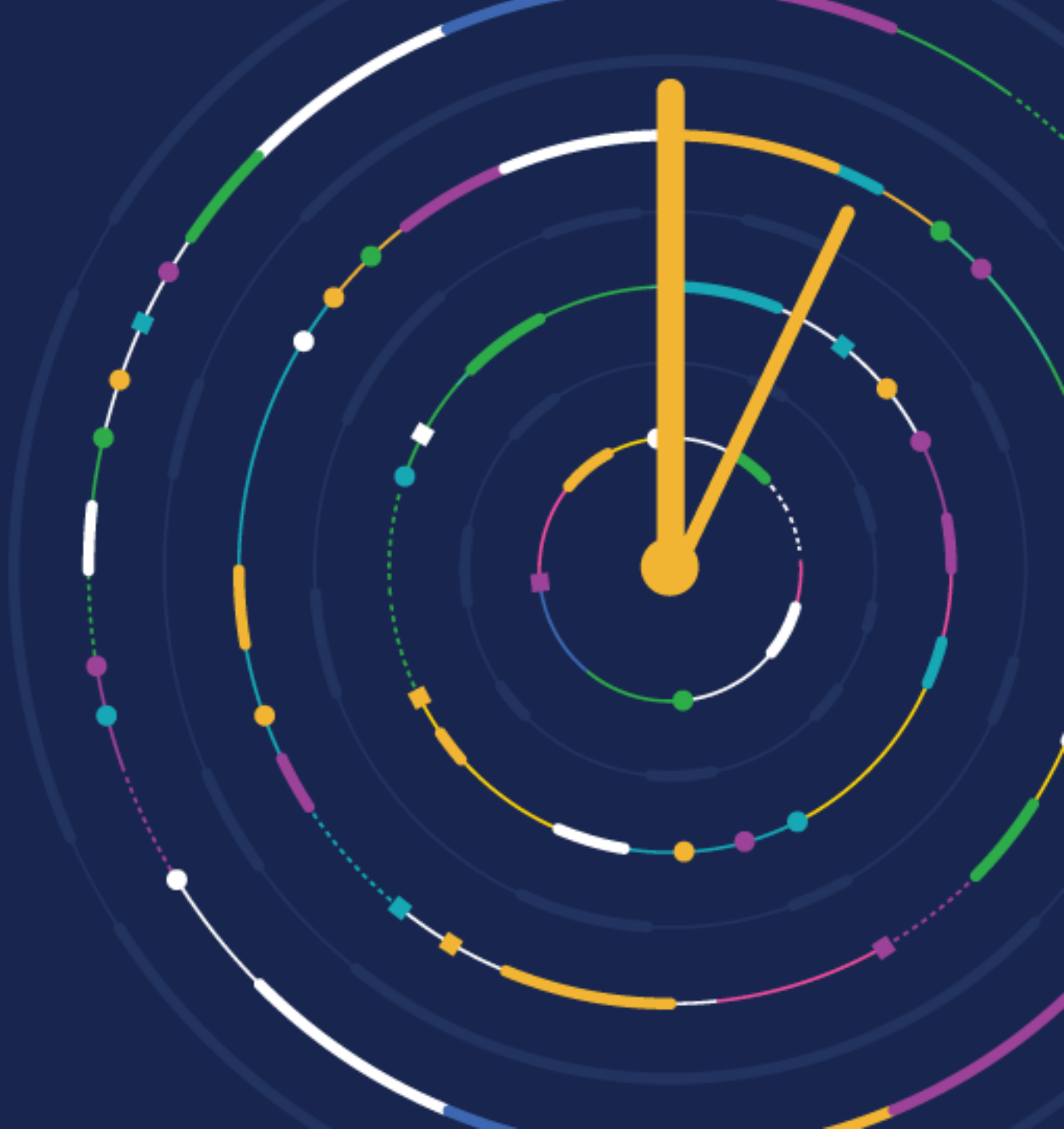

# Service!

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# BC

- Service Items
- Service Contracts
- Service Orders

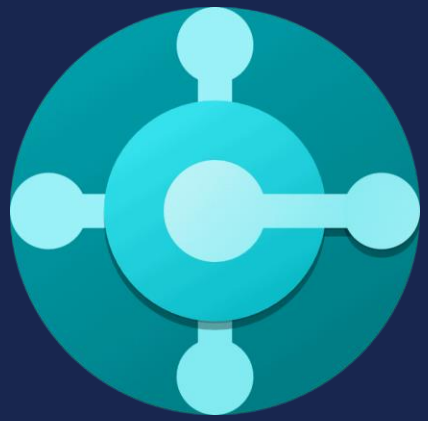
# Dime

- 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

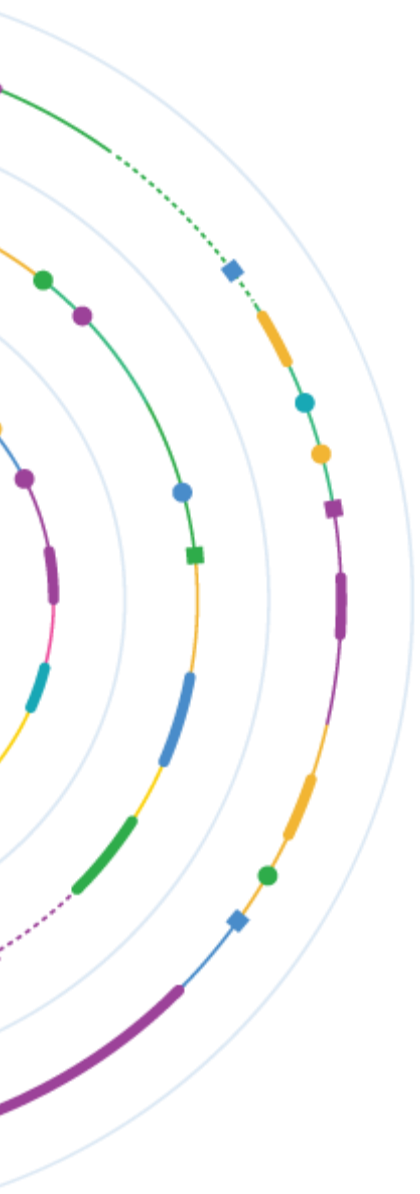
| Code | Description | Default Contract Discount % | Default Serv. Price Group Code | Default Response Time (Hours) | Create Service Item |
|---|---|---|---|---|---|
| STD | Standard | | | 24 | ☑ |

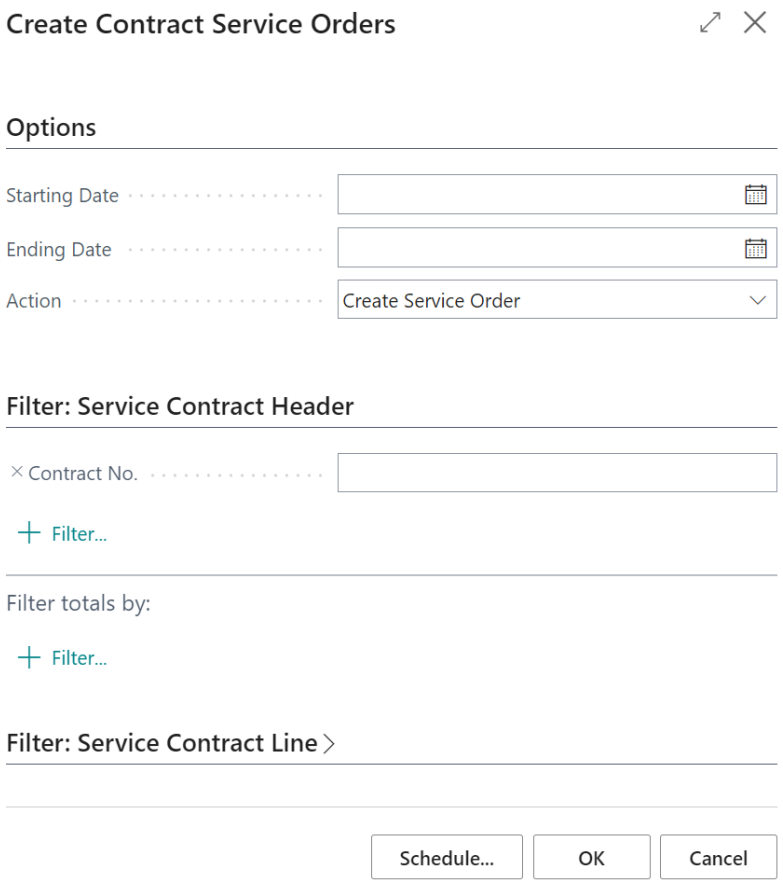
- When the Sales Order containing that item is sold, the Service Item is created
- Can auto assign Warranty based on Standard setup or Item Tracking Code

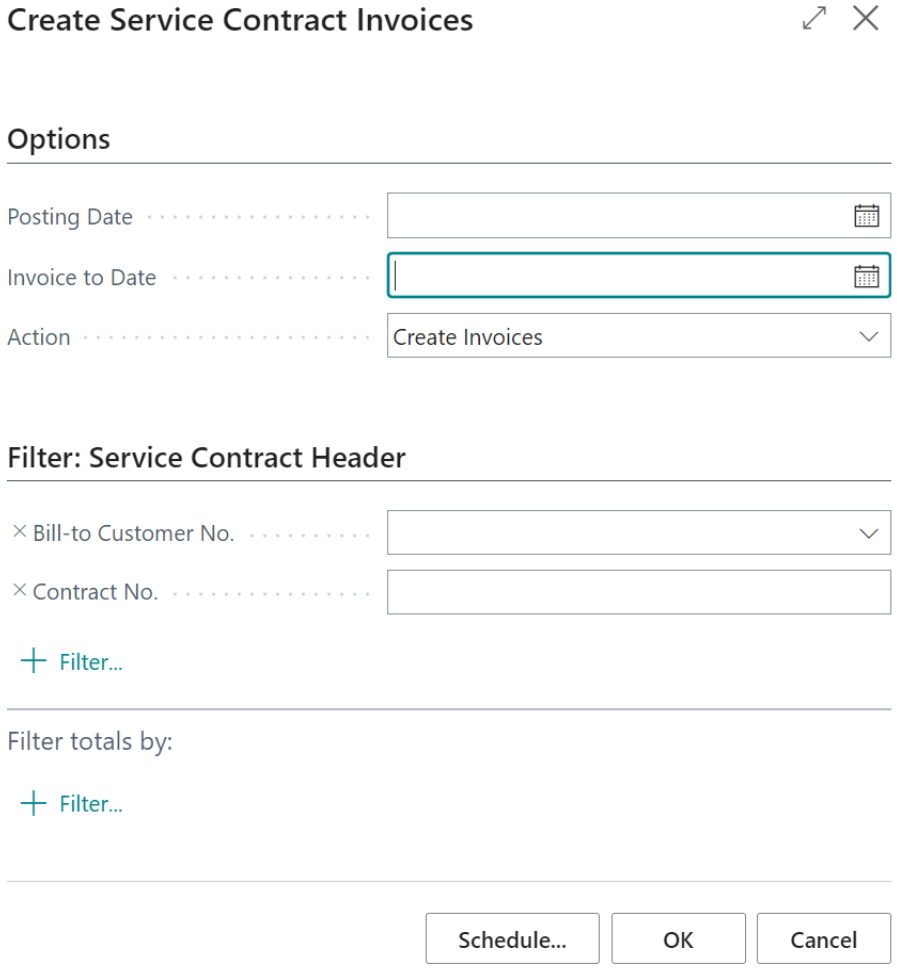
# Service Contracts

- 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





# Service Orders

| | |
|---|---|
| Fault Area Code | |
| Symptom Code | |
| Fault Code | |
| Resolution Code | |
| 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)

Lines | Manage | Functions | Line

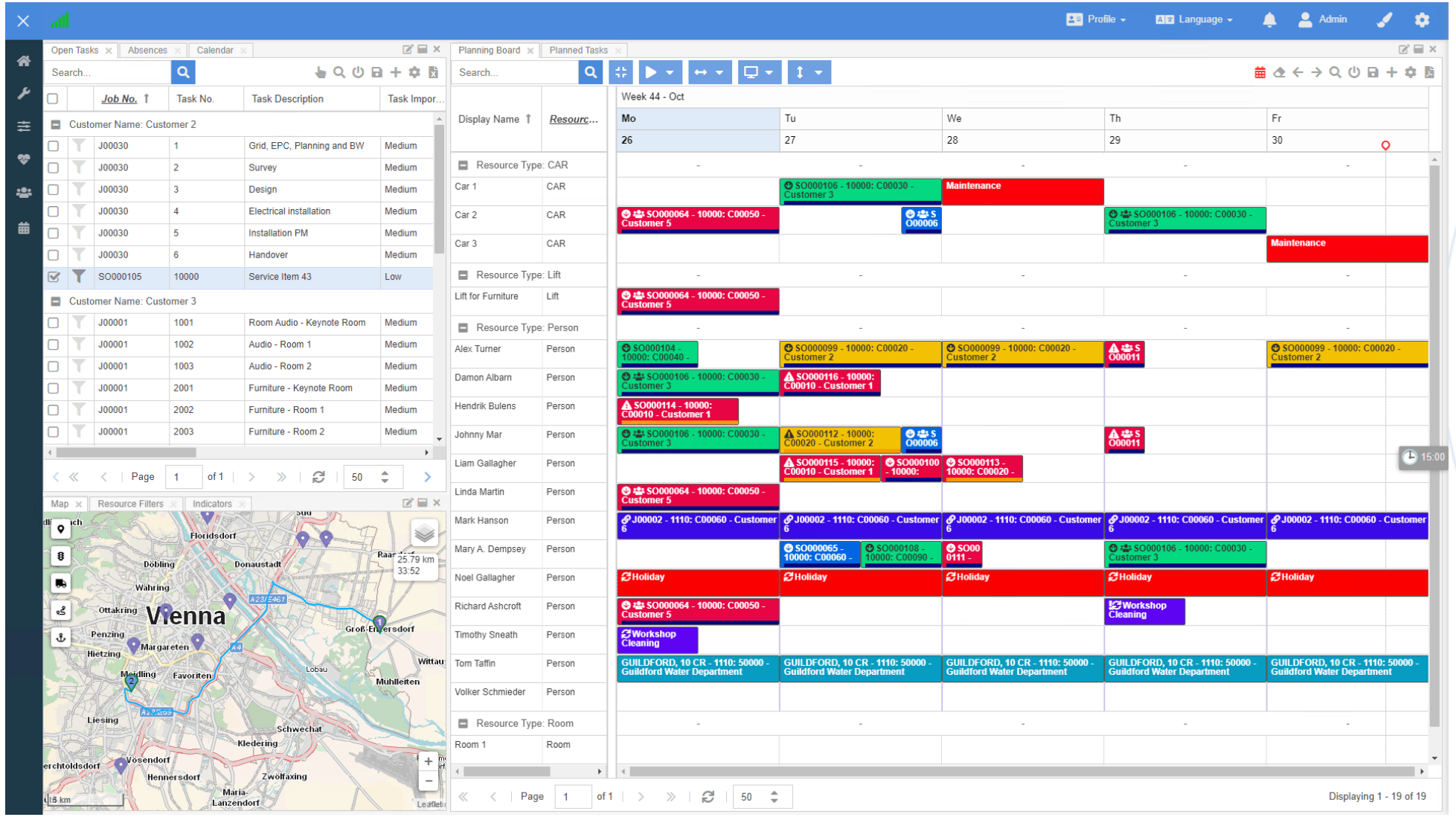
New Line | Delete Line

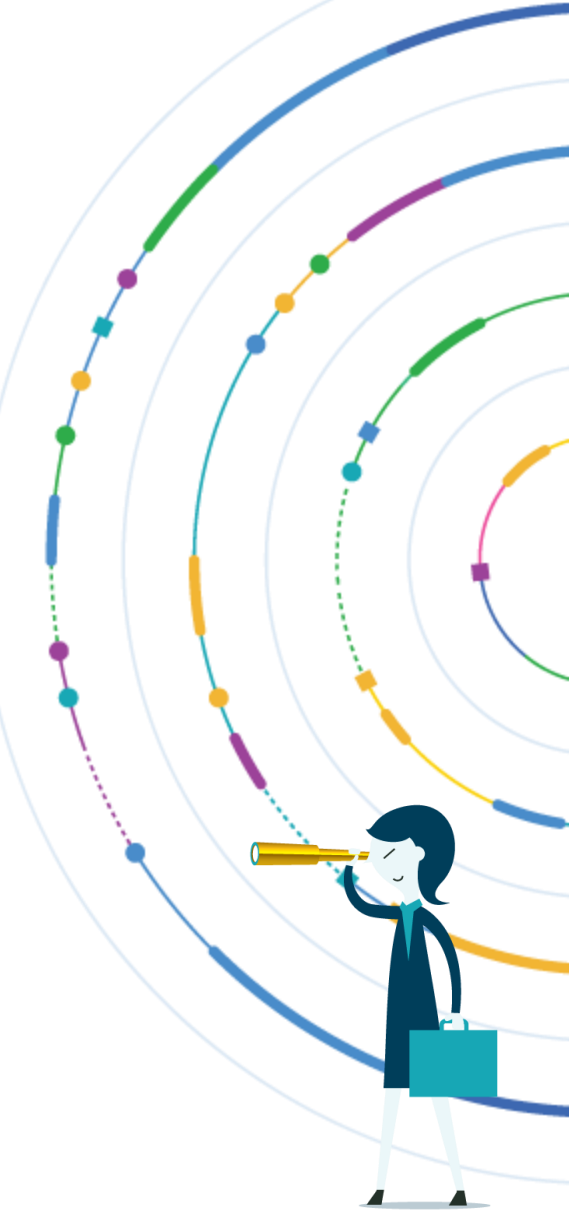
| | Type | | No. | Description | Location Code | Unit of Measure Code | Quantity | Unit Price Excl. VAT |
|---|---|---|---|---|---|---|---|---|
| | Cost | | START | Callout Charge | | PCS | 1 | 100.00 |
| → | Item | ⋮ | SP-BOM1107 | Circuit board | MAIN | PCS | 1 | 0.00 |
| | Item | | SP-BOM1105 | Switch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

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

# Dime Scheduler

# Scheduling



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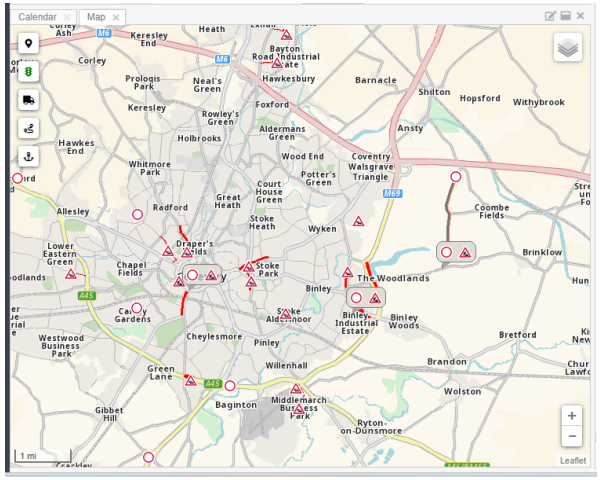
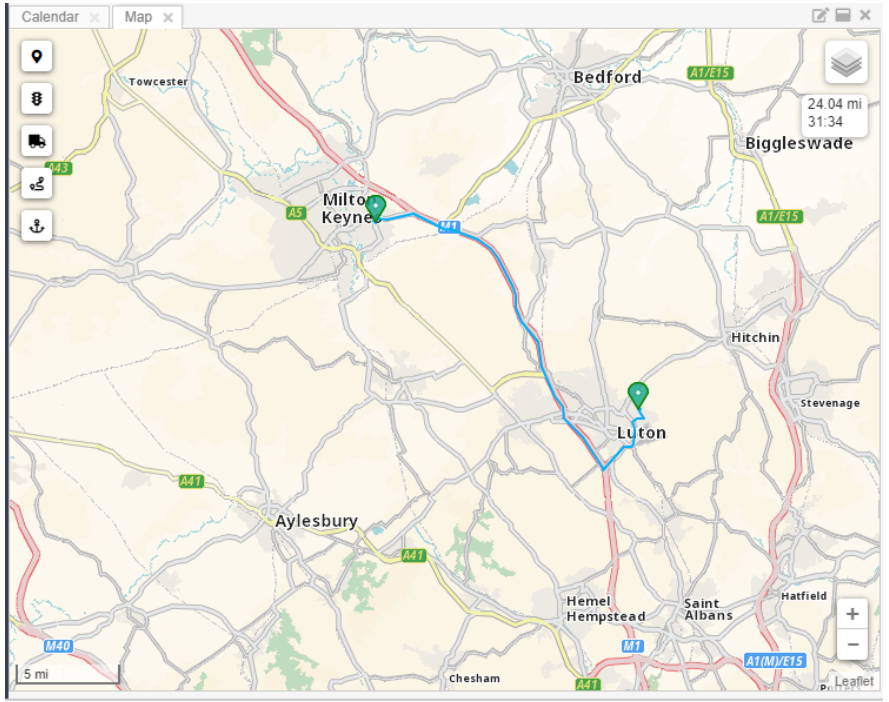
- Orders can be easily replanned to new time or different resource
- Planned Orders can be grouped or split
- Categories, linked to Service Order Types
- Timemarkers, linked to Repair Status, can be used to give real-time feedback of an order status (linked to a mobile device – See Anveo)

# 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



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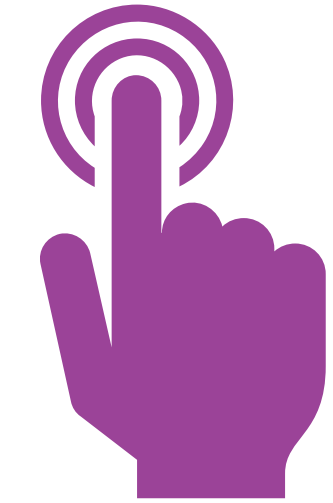
# Anveo

# DEMO



# QUESTIONS ?

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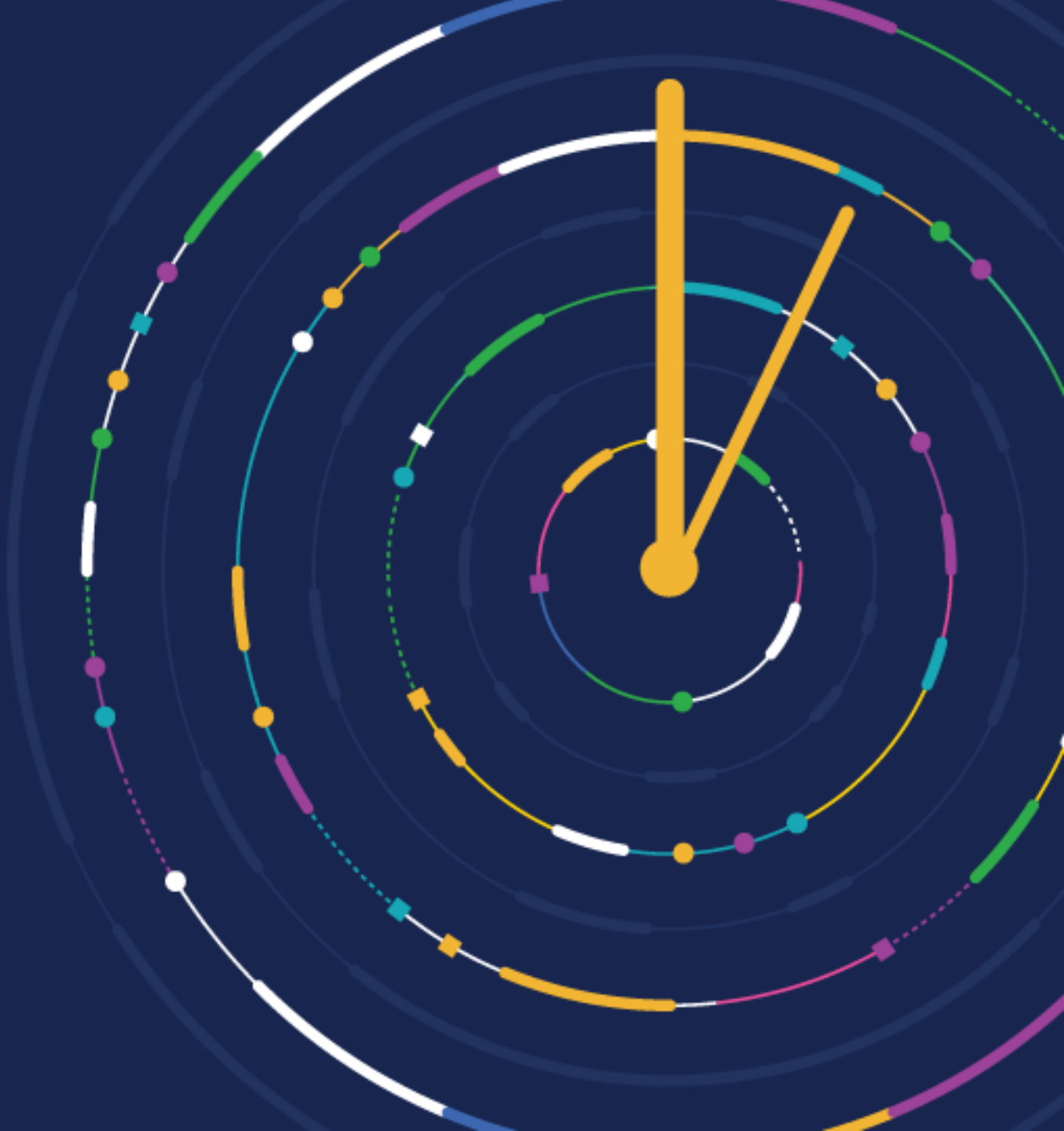
# THANK YOU



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