

# Customer Relationship Management

## BENEFITS

**Share information.** With easy and accurate access to a vast array of information, organizations can provide customers with first-class service, ensuring that the right technician is dispatched with an understanding of the complete history of the customer.

**Increase customer satisfaction.** Improve customer service and reduce costs with Web-based tools that enable customers to resolve service issues themselves.

**Make quick, intelligent business decisions.** Use standard reports and inquiries to track equipment service details, parts usage, and technician labor. Monitor customer call status, response times, and technician workload. Analyze customer and equipment call history, service contract profitability, and vital warranty issues.

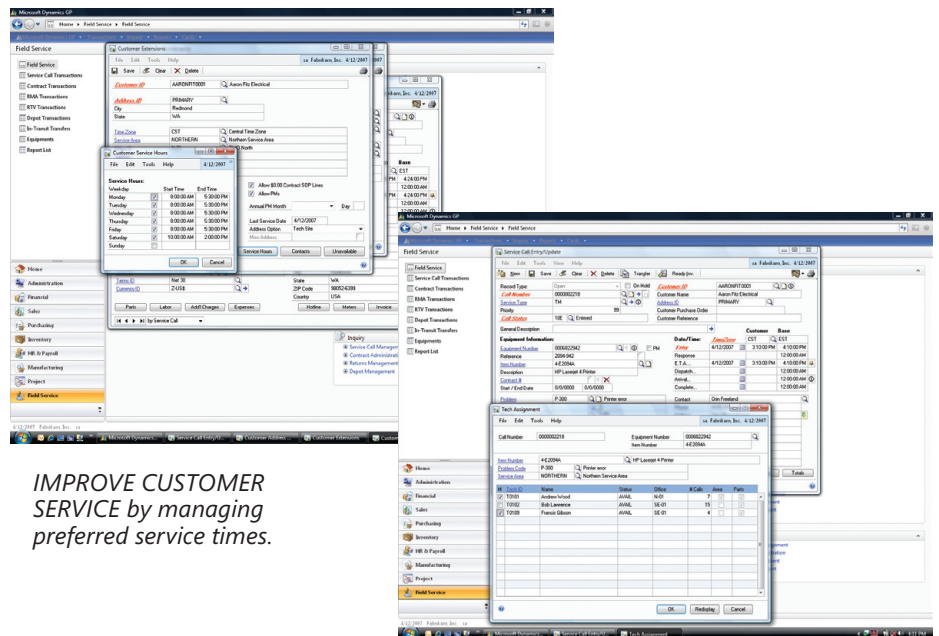
**Give technicians fast access to maps and directions.** Help ensure on-time arrival through GPS integration with Microsoft MapPoint®.

**Flexibility.** Reverse a contract or credit a customer a flat or prorated amount when cancelling a contract. Provide visibility across the organization to ensure that the right resource is assigned to the right work order.

## Field Service Management in Microsoft Dynamics GP

Manage complex field service operations with higher levels of profitability and customer satisfaction. Four powerful modules integrate essential accounting, distribution, and service processes to increase technician productivity, reduce overhead, and open new revenue opportunities while focusing on what's important—your customers.

Increase business productivity by adjusting quickly to change: tracking the effective date of changes so they can be made before they become effective, easily managing contracts and equipment, and increasing efficiency in estimating the amount of time to complete service calls. You can turn your service center into a profit center by proactively initiating contract renewals, tracking product warranties, level loading technician schedules, and more.



*IMPROVE CUSTOMER SERVICE by managing preferred service times.*

*EFFICIENTLY RESOLVE A SERVICE CALL by assigning multiple technicians to a call.*

## FEATURES

## FIELD SERVICE MANAGEMENT

<p><b>Service Call Management</b></p>	<ul style="list-style-type: none"> <li>• Track and update new and historical service calls against a contract or service warranty. Time execution, coordinate customer schedules, assign appropriately skilled technicians, and escalate calls automatically.</li> <li>• Track parts, labor, and expense details. Create a Parts Usage report. Manage spare parts and trunk- and lot- tracked stock inventory.</li> <li>• Monitor customer billing. Automate a single consolidated invoice.</li> <li>• Generate standard and ad hoc reports to track profitability and analyze parts failure, technician utilization, and workload.</li> </ul>
<p><b>Contract Administration</b></p>	<ul style="list-style-type: none"> <li>• Maintain unlimited contract price books, monitor profitability against service calls, and recognize revenues through five different methods.</li> <li>• Create and convert customer quotes for multiple service levels and options. Utilize contract options and response times to provide customers multiple levels of service agreements. Renew contracts by re-pricing and then reissuing them, or by utilizing automatic renewal capabilities. Bill customers based on time or meter usage.</li> <li>• Identify the sales order or purchase order document number that created the Equipment record with an Equipment record audit trail. Ensure accurate billing and compliance with service agreements.</li> <li>• Exclude "expired lines." Move contract line items from document to document or from site to site within a document. Highlight multiple equipment parts in the Equipment lookup to add to a contract instead of adding them line by line.</li> </ul>
<p><b>Preventive Maintenance</b></p>	<ul style="list-style-type: none"> <li>• Forecast purchasing and scheduling requirements based on time in service or product usage. Coordinate open service requests with upcoming preventive maintenance calls. Track details of Preventive Maintenance activities.</li> </ul>
<p><b>Returns Management</b></p>	<ul style="list-style-type: none"> <li>• Perform automated checks for returns. Track repair and return status.</li> <li>• Accurately credit customers based on the original sales invoice. Generate customer return merchandise authorizations (RMAs) from historical customer invoices, service calls, or manually. Built-in workflow management allows for a separate RMA item receiving process and RMA closing process.</li> <li>• Meet customer and vendor requirements for product and part returns. Generate return to vendors (RTVs) or depot work orders with a single click. Automatically transfer return-to-stock items from the returns warehouse to the main warehouse.</li> </ul>

For more information about Field Service Management in Microsoft Dynamics GP, visit [www.microsoft.com/dynamics/gp](http://www.microsoft.com/dynamics/gp).

© 2007 Microsoft Corporation. All rights reserved. Microsoft, Microsoft Dynamics, the Microsoft Dynamics logo, and MapPoint are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. This document is for informational purposes only.



Isis, Inc., P.O. Box 70460,  
Richmond, VA 23255, 804-762-4200

**Microsoft**