

MYOB Advanced

Field Service Management

How to improve profit
and customer loyalty

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Field Service Management

Field Service Management can be both a huge source of profit and an effective way to increase customer satisfaction. This paper will show you how to do just that using modern technology systems and strategies.

1. Field Service should be viewed as a growing profit opportunity.
2. Mobile tech is critical to optimised scheduling and dispatching.
3. Integrated tracking of installed equipment provides more value.
4. Exploit your data for ongoing improvements and savings.



Increasing your competitive strength with Field Service

Effectively managing the installation of equipment and machinery in customer locations boosts revenue and profit for many equipment manufacturers, distributors and retailers.

It also increases a company's reputation and the strength of customer relationships.

Managing service efficiently is the key to making field service profitable and building that customer reputation. It's also important to make sure the service is effective.

Provide preventive maintenance that reduces breakdowns and lowers customers' overall cost. Make sure repairs are quick. Ensure the right people, tools and parts are available where and when needed. Make sure you do this whether the maintenance and repair is done under warranty (at the manufacturer's expense) or at the customer's direct expense.

The important thing is to view Field Service as a growing profit opportunity and not just a necessary cost of doing business.

In short, focus on efficiency and effectiveness.

Field Service should be viewed as a growing profit opportunity and not just a necessary cost of doing business.

Integration for end-to-end Field Service Management

To build a competitive edge, Field Service teams are turning to organisational strategies and information tools. We're talking automated scheduling and dispatching, integrated management and accounting systems, plus the power of databases, analytics and sensor technology. These tools have already helped advance the manufacturing and distribution sector.

With the right tools in place, a Field Service business can effectively manage key areas across its operations.

Accounting and administrative tools

In accounting and administration, integrated operational and accounting systems ensure prompt and correct billing. As well as full and proper financial records that make analysis and audits easy.

Inventory management and tracking tools

Inventory control makes it easy to plan and manage a company's parts inventory – which can usually be a challenging task. Effectively tracking installed equipment, customer order transactions and data, engineering and maintenance records ensures the company is always in the know and on top of their game.

Apply the same organisational strategies and systems to field service that have delivered proven advancement to manufacturing and distribution.

Scheduling and dispatching tools

These advanced tools can help you optimise technician schedules to get the most value of their time. You can lay out the best routes for minimising logistics costs, coordinate part and tool deployment for maximum availability and coordinate service requests to provide the best response to customer needs.

Success comes from integrated systems tied to customer management

An integrated system helps all areas of your field service business work together to make the best use of available resources while delivering the best service for customers.

Your integrated system should also be tied to your customer management systems such as your ERP, inventory management, finance and administrative systems, sourcing and engineering. This will help you easily share relevant data, coordinate activities and avoid duplicate entry.

Getting your service technicians to the right place at the right time

In a Field Service business, effectively sending service technicians to a customer site is paramount.

You need to:

- + Develop a schedule to make most effective use of their time.
- + Manage their daily schedule, routing, and assignments to provide the best service for customers.
- + Make sure the vehicles, tools and inventory are available where and when needed.
- + Redirect and reschedule when an emergency request takes priority over previously scheduled work.

Schedules can be developed in advance, particularly for routine and preventive maintenance tasks. Repairs are another story. In most cases, repairs are top priority and must be handled immediately to get equipment back on-line. It's essential to make the best use of the technician's time while considering ever-changing priorities, travel time and distance, and the availability of parts and equipment.

An automation toolset like MYOB Advanced Field Service Management creates the optimum routing to reduce transportation time and make the most of a technician's time. It includes an Embedded Google Maps service that displays routes to help dispatchers make better decisions quickly. A visual dispatch board also lets the scheduling team determine the best way to respond to changes.

It even tracks the repair and maintenance history of each customer and each piece of equipment. MYOB Advanced provides the responding technician with the information needed to assess the adequacy of the parts and tools currently on the service vehicle or have them delivered promptly so the repairs can be completed without unnecessary delay.

Mobile technology is critical to optimised scheduling and routing

Mobile technology helps field technicians stay in touch with changing schedules. It also improves efficiency and control. Activity reporting through mobile technology keeps better track of a technician's time. This allows for more accurate billing and accounting while simplifying the reporting task. How? By eliminating paperwork, manual calculations and missing data.

Data entry of time spent, parts used, repairs completed, equipment history and more is instantly updated in the billing, inventory and equipment history records.

Mobile technology also provides easy access to customer and equipment data to help the technician complete the service properly. It also gives the technician an opportunity to provide additional services like preventive or scheduled maintenance while already at the site. This saves time and money for both the customer and the company.

Technicians can also add photos from their phone or tablet before and after the service call to add to the service record. With MYOB Advanced, technicians

in the field have access to prior customer service information and what parts are under warranty and what are not.

After the job is completed, the time and part used is instantly uploaded in real time to the system for faster and more accurate billing. This information is accessible to any future technicians who work on that customer's needs. Many mobile devices also support voice recognition that allows the technician to dictate job site information instead of keying and use customer signature capture on quotes and/or completed service orders.

Since the mobile device is connected in real-time to MYOB Advanced, any dispatching changes appear on the mobile device immediately. Likewise, traffic information is constantly refreshed to provide the best current route to the next customer site. With MYOB Advanced Field Service Management, technicians are connected anytime, anywhere on any device with a browser. There's no need to purchase expensive proprietary devices to go fully mobile.

Customer and equipment data are readily available via mobile device to help the technician complete the service – including the opportunity to provide additional services like preventive or scheduled maintenance.

The value of integrated tracking of installed equipment

The above discussion of service operations gives a hint of the value of tracking installed equipment and its service history, but there's more to be gained from detailed equipment tracking. Having that information available to assist in provisioning of mobile inventory, as a base for tracking maintenance and repair history (linked to equipment engineering and use data for analysis, planning, and product improvement), and keeping records for warranty purposes are all obvious and important needs. But there's more value available.

The anchor for equipment tracking is the basic identity of the equipment itself, established when the equipment is sold and installed. This data should come directly from the sales order processing function and tie to engineering and manufacturing records to include model and revision level, configuration, performance and durability data (engineering specs, mean time between failures for critical parts and subsystems, recommended maintenance intervals), serial numbers and other identifying data. The equipment service database is a critical part of Product Lifecycle Management (PLM).

Serial number tracking

Serial number tracking is even more important in support of those engineering studies mentioned above and in cases where there is the potential for litigation or product recall (and where is that not a possibility in today's litigious world). The serial number is also part of the basic equipment identification that supports configuration history (as-is configuration to compare to as-built and as-designed). The Acumatica system keeps track of the service history for that equipment, including every part that was added to it or serialised part that was maintained or replaced. An unlimited number of serialised components and subsystems can be tracked to an individual piece of equipment.

There's more to be gained from detailed equipment tracking. Easily manage scheduled maintenance, recalls, certifications, and compliance issues for your customers.

Certifications and compliance tracking

When it comes certain situations like medical equipment, commercial kitchens or elevators, the distributor or manufacturer may need to regularly certify systems and equipment for factors such as health and safety. This is an important part of preventive maintenance.

MYOB Advanced helps document these important certifications and ensure everything is up-to-date. Expired certifications and compliance create major legal issues for customers. A supplier that helps customers stay on top of these requirements will be considered a valuable partner.

Enhance customer loyalty with information availability

Imagine a customer calls and the service rep has all their equipment information right in front of them.

"I see that your machine was serviced last month and the tech noted that you may be running low on filters. We can put some on the truck going to your place to service ABC machine next week."

"You're calling about your model 5? I see that it was last serviced over a year ago, so it probably needs a level 2 overhaul at this point. Why don't we schedule that for next week and get it done when we install the new tool you called about?"

With the right information, you can help the customer keep their equipment running smoothly and reliably. This type of interaction is important, as it makes you a partner in the safe and effective operation of their equipment.

Better manage inventory of tools and parts

Field Service inventory of tools and repair parts is typically spread across multiple vehicles and warehouse locations. With MYOB Advanced, you can control and track these locations and costs. Being able to handle maintenance issues requires having the right parts – some of which are very expensive. It's not practical to carry significant quantities of all those parts, so repair organisations must balance supply and demand very carefully. Since inventory and purchasing are integrated, replenishment orders can be sent to a specific location and, when the parts arrive, the dispatcher can schedule the service appointment for installation.

MYOB Advanced manages inventory using the same proven techniques used by our retail, distribution and manufacturing customers. Inventory records benefit from an automated receiving and picking process along with the simplified (usage) data entry on mobile devices in the field.

Inventory is controlled at the vehicle level- each vehicle is treated like a mini-warehouse. You always know what is available and what is on order by vehicle and warehouse. Transfers can be initiated and tracked easily between locations and vehicles.

When a service order is created and the required repair parts are not in stock (anywhere in the warehouse and vehicle network), the system can quickly generate a purchase order. When the item is received, the dispatcher is alerted so the service call can be scheduled. Inventory usage data is captured for later analysis and for planning inventory policies for every item. This maximises availability and deployment.

Each vehicle should be treated like a mini-warehouse- always know what tools and repair parts are available or on order at both the warehouse and vehicle level.

Integrate your analysis, accounting, and administrative information

The beauty of having an integrated system for field service, distribution and accounting is that the unified database can be exploited for ongoing improvements and savings. Reports and measurements (including KPIs) are much more meaningful when multiple aspects of the business are considered in context across functional areas.

Stay informed, always

Standard functions provide alerts when maintenance contracts are due for renewal, for example, to preserve your revenue stream and help customers avoid unpleasant surprises. Dashboard options include such information as pending service requests and status.

Apply business intelligence

The ability to analyse the data and look for patterns and intelligence is important. Cross referencing repair history with usage information, location, or design details could lead to adjusted preventive maintenance recommendations or changes in part inventory policy.

Optimise financial accuracy

Integrated accounting and mobile technology help ensure that invoicing and warranty cost analysis are timely and accurate. Technician time is fully accounted for, customers are assured that warranty and contract costs are accurately credited, and part and material pricing are up-to-date and correct. Technicians never have to enter information manually or redundantly. It is logged into the system everywhere it is needed from simple entries on their mobile devices.

Field Service Management – great for companies and customers

Customers want and need their equipment to be in top shape and working effectively. Down time must be minimised through preventive maintenance. Any problems or breakdowns must be quickly attended to. Your field service team is responsible for delivering on those mandates.

Enable excellent field service with integrated Field Service Management applications to:

- + Schedule and dispatch service technicians to use their time effectively, minimise unproductive travel time, respond to emergency calls quickly and efficiently.
- + Deploy inventory optimally to support maintenance and repair needs, track the receipt of needed parts to schedule installation as soon as they are received.
- + Maintain full equipment identity, configuration and history records to support service operations and provide intelligence for performance improvements and equipment support over the lifecycle.
- + Exploit mobile technology to remove administrative burden from technicians and make best use of their time.
- + Build and use an extensive database for analysis, performance improvement and best support for existing equipment and engineering the next generation.
- + Ensure fast and accurate billing and accounting.

Quick guide: Key benefits of MYOB Advanced Field Service Management

MYOB Advanced Field Service Management System

The MYOB Advanced Field Service Management system is a comprehensive and extremely customisable system, making it easy to implement for any type of field service business. MYOB Advanced Field Service Management covers the entire range from quote to contract and billing/collection (for both contract and individual transactions), scheduling and dispatching, inventory management and deployment, accounting and analysis, and a strong link in the product lifecycle management chain. Track and manage the maintenance and repair process from shipment and installation through ultimate disposal, making your Field Service business effective and efficient, pleasing customers and generating a profit.

Expedite assignments

- + Quickly capture service needs and access customer information, product history, and resources.
- + Shorten the time between call receipt and job assignment.

Track resources

- + Track resource commitments.
- + Match tasks to best available resources.
- + Generate work orders automatically.

Optimise schedules

- + Schedule the right people at the right time with the right skills to perform work.
- + Use the field services calendar scheduling board to create daily or weekly schedules automatically or use the convenient drag-and-drop tools.

To find out more about MYOB Advanced Business or Advanced People, talk to your MYOB Advanced Partner.

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