

# Service Management

**Dynamics Software Service Management for Microsoft Dynamics™ AX supports your service organization featuring: complaints and warranty, repairs and periodic maintenance. At the same time you have direct access to all the data you need about the objects, resources, agreements and logistics.**

## Key benefits:

- ✚ Helps you in tracking and tracing service requests
- ✚ Supports you with hierarchical object (e.g. site, system, component) maintenance
- ✚ Manage your contracts, including service levels, periodic invoicing and depreciation
- ✚ Provides you with full financial forecasting and cost evaluation
- ✚ Offers you support with logistics, financials and work orders for the service crew and workshop
- ✚ Real time statistics on costs and revenues regarding a service contract/object
- ✚ Integration with Microsoft Mappoint for route optimizations
- ✚ Your daily data entry will become easy via extensive setup features

Service Management is fully integrated with the Microsoft Dynamics™ AX modules CRM, Trade, Logistics, Projects and Resources modules. Service Management offers your service organization the tools to be in control of:

## Short term:

- ✚ Open service requests
- ✚ Status of requests in respect of applicable SLA's
- ✚ Short term resource planning synchronized with item availability (and ad-hoc for repairs)

## Long term:

- ✚ Resource requirements
- ✚ Financial planning based on contracts

## Financial:

- ✚ Invoice hours, materials and costs spent
- ✚ Non-invoiced but ready work

## Statistics:

- ✚ SLA fulfillment
- ✚ Average time to repair
- ✚ Pre- and post calculations of costs and revenues (per request and per object and per contract)

Service Management provides you the key functionality you need to manage your service business and guarantees 100% customer satisfaction. Service Management is a fully integrated Microsoft Dynamics™ AX projects module that supports you in handling service requests and initiates the activities of work centers.

Service concerns objects (e.g. a car, a machine, a software program, a building or any similar type of asset). The system offers you several ways to register these objects in relation to the service you want to provide. Objects can be a single item or a complex installation consisting of many objects and components in a flexible hierarchical structure.

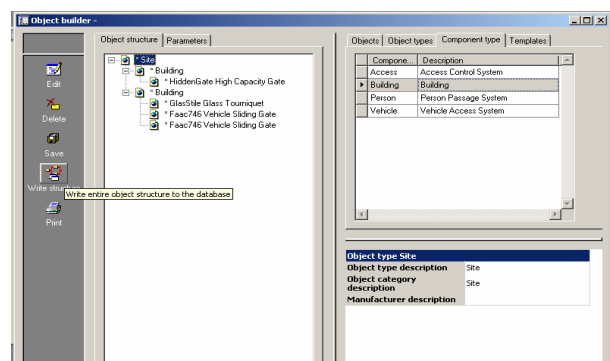
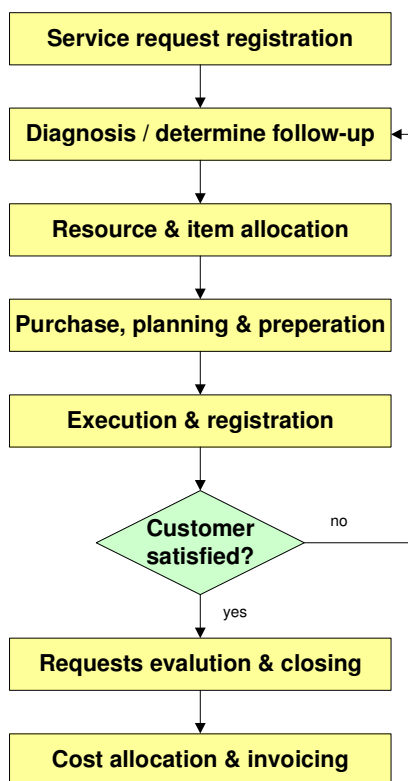


Figure 1: Graphical object builder

The service levels and types of service you agree upon with your customer can be registered in a contract with a direct relation to the objects and relevant customer data. Complete history on service data provides you with the (financial) management information you need.

## The basic service process

In the picture below, a basic service management process is presented. Service Management can be fully configured to meet the service process requirements of your organization.



## Service requests registration

This first step provides you a starting point for service monitoring. The system generates a unique Id (call number) and determines the context for service: Customer, Contract, Object, Service level agreement, Invoice ability, employee responsible for the follow-up.

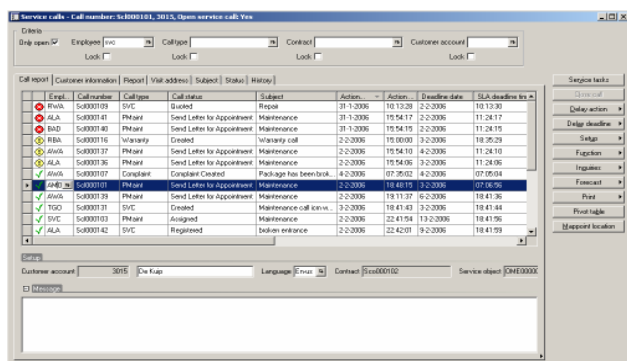


Figure 2: service calls summary

Procedures are modeled through call-types which can be customized.

Any change in flow related data, is recorded in the call-history. This allows for extensive and detailed SLA fulfillment analysis.

You have the possibility to notify status changes to your employees, customers and vendors via automatic e-mails.

## Diagnosis / follow up

You can route the service requests and - if needed - additional work can be identified to be carried out by the workshop or field-service.

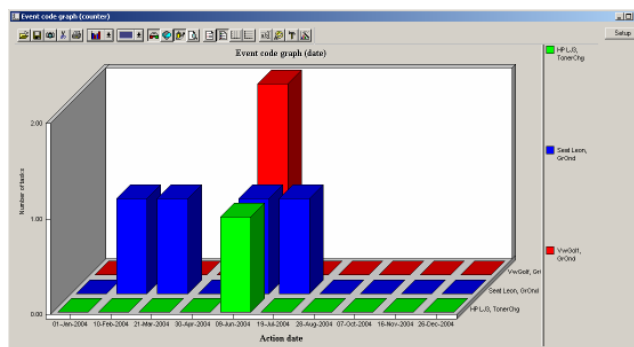
Sales-orders (without hours or planning) can also be used in the follow-up.

## Resource and item allocation

Service Management uses 'event codes' to identify work packages, which have budgets and proposed spare parts.

The event code serves as a template for a new service task.

Event codes provide a common classification, which allow for comparison over multiple object types.



Service management offers you several graphical overviews to analyze call/event behavior on (a selection of) service objects.

## Purchase, planning and preparation

Service Management suggests a work center, based on the object (location management) and event code (skills management) settings you have entered into the system.

Your planner first determines what kind of resources (type/group of employees, machines and materials) are necessary for solving the service request. Based on standard problem codes that can be indicated for each object type, a standard use of resources is proposed. It is possible to access a list with sub-objects and/or components

of which an object consist of. Based on these data, a detailed quotation can be made.

With Service Management you get a graphical planning tool for a clear and detailed overview regarding the scheduled activities for your service employees. Using this tool, your planner has all the necessary data in one screen.

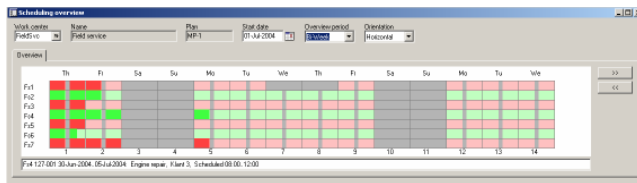


Figure 3: graphical service planning with drag & drop

Several views are provided:

- ✚ Work center(group)s – The view can be generated per work centergroup or per work center
- ✚ Overview period – The view can be generated by day, week, workweek, bi-week and month
- ✚ Orientation – Horizontal or vertical  
There are different ways to view the work centres and periods

Within the graphical overview you can reschedule the service task by just 'drag and drop' and getting detailed information by directly zooming in on underlying information (service request, capacity reservations, etc.).

## Execution and registration

When your service employee is planned for a service task, a work order is created. Work orders combine items, hours and work specification into one document. Work orders may start as quotation from the sales module, from a service request or from predefined planned maintenance on an object in a service contract.

After the service activities have been carried out, hours, materials, costs and kilometers are accounted for, so that they can be charged as agreed upon.

## Request evaluation and closing

The allocation of the costs (hours, materials, costs and kilometers) which are related to the service request are finally set, after the activities in question have been carried out. Also at this time, it is clear which part can be charged for.

You can monitor the progress of the service request by service statuses. These statuses can be determined for each service request-type. Each change in status is logged,

thereby creating a historical overview of the processing of the service request.

After closing the service request, the status 'closed' is attached and the service request becomes historical.

## Cost allocation and invoicing

It is possible to invoice the activities not only after closing a service request, but also during the entire process.

Periodically (daily, weekly, monthly, etc.), invoice proposals are generated, based on an invoice schedule related to the service contract.

What is invoiced on which date, depends on the contract agreements made and the costs incurred in carrying out the service request. Also included in the invoice, in addition to the costs from the processed service requests, are the service, rent and lease amounts to be paid periodically.

## Service prognoses

The data that is recorded for each contract (service, hour or lease) provides the possibility of drafting prognoses from different perspectives. This concerns the costs and the revenues, as well as the necessary resources (people and materials).

## Historical data

For each object, almost everything that occurs - from the standpoint of service - is logged and saved. Over a period of time this provides a rich basis of historical data for each object and each contract:

- ✚ the amount of service requests
- ✚ how long did the service activity take
- ✚ what types of requests and which activities are performed frequently
- ✚ what is - in practice - the standard service process for an object(type) so service schedules can be drafted and adjusted
- ✚ hour and materials which are necessary for various types of activities

In addition to this, more operational information, historical data concerning the costs and revenues can also be retrieved. What did the service object cost with respect to depreciation, hours, components, hiring third parties, etc.? Were the revenues for the period sufficient to cover the costs?

## The objects you perform service on

Service Management manages service objects and creates

history on logistics and financials on each object. An object can be defined as the product on which the service is given. This can be a car, a machine, a program, a building or any similar type of asset.

An object can be a single item or a complex (hierarchical) structure of sub-objects and components (e.g. site, system and component). Service can be provided on all levels of this structure. Transactions and statistics can be drawn on the individual object levels or as a sum of the sub-objects.

Hierarchical structures are easily created using a graphical object builder.

An object type is assigned to each object. An object type allows you to maintain standard characteristics and customizable properties.

### The service agreement with your customer

With respect to the objects, several types and levels of service can be agreed upon. With Dynamics Software Service Management you can create contracts for different purposes and manage these contracts in detail.

Within a contract, you can for instance keep track of:

- ✚ Start and end date
- ✚ Start of invoicing and period for invoicing
- ✚ Usage volume agreement
- ✚ Default request/call handling, which in turn defines flow and deadline times
- ✚ Preventive maintenance dates
- ✚ Project integration for correct sales pricing, invoice status and project postings based on the combination of contract- and request-type
- ✚ Periodic invoicing, with calculation and specification of coverage type
- ✚ Registration per object of active configuration complete with serial numbers

In addition to service contracts also contracts with respect to guarantee, rental and lease can be registered.



### About Dynamics Software

Dynamics Software Service Management is developed and maintained by Dynamics Software AG. Dynamics Software is a certified Microsoft Dynamics™ AX Independent Software Vendor (ISV). For more details you can contact the Dynamics Software Sales team.

Microsoft Dynamics™ AX is developed by Microsoft Corporation and marketed and distributed worldwide.

This information is based on Dynamics Software Service Management 2.0 and 1.85 for Microsoft Dynamics™ AX, version 4.0 and 3.0. The solution is available in multiple languages

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## Data summary sheet

### Dynamics Software Service Management for Microsoft Dynamics™ AX

Main features	Description
CONTRACTS	<ul style="list-style-type: none"> <li>Contract quotations/confirmations</li> <li>Independent invoice schedule</li> <li>Unit volume for forecast correction</li> <li>Flexible project integration</li> <li>Used service points</li> <li>Preventive maintenance schedule per contract</li> <li>Invoice scheduling per contract</li> <li>Travel expenses template</li> <li>Request handling template with SLA</li> <li>Unlimited number of service objects</li> <li>Service object log</li> <li>Specification coverage components</li> <li>Service request overview and functionality</li> <li>Automatic crediting in case of “turning back the clock” when a contract is preliminary ended</li> <li>Project forecast based on set-up/object type usage volume</li> <li>Financially integrated with projects without overhead</li> <li>Invoicing in advance with posting in correct financial period</li> <li>Contracts may be extended for another period, using new or old price agreements</li> <li>Batch and bulk postings</li> </ul>
OBJECTS/SUB-OBJECTS	<ul style="list-style-type: none"> <li>Graphical object builder</li> <li>Automatic creation of objects/contracts from sales lines</li> <li>Objects can be associated with Inventory</li> <li>Full financial service history</li> <li>Full logistic service history</li> <li>Depreciation versus invoicing</li> <li>Pools of objects for large contracts</li> <li>Maintenance of hierarchical object structures</li> <li>Planned maintenance, based on time or usage volume</li> <li>Active configuration of objects including serial number per sub-assembly</li> </ul>
OBJECT TYPES	<ul style="list-style-type: none"> <li>Object class and manufacturer maintenance</li> <li>Recurring tasks with BOM as item context</li> <li>Service schedule at volume or time interval</li> <li>Forecast of time and materials for each service schedule line</li> </ul>
COMPONENTS AND COMPONENT TYPES	<ul style="list-style-type: none"> <li>Extra level in the hierarchical object structure</li> <li>Detailed registration on meaningful components</li> </ul>
EVENTCODES AND OPERATIONS	<ul style="list-style-type: none"> <li>Predefined material and hour usage per object type on service requests</li> <li>Forecasting on planned maintenance</li> <li>Statistics on budgets and realizations</li> <li>Detailed registration on meaningful components</li> </ul>



## Data summary sheet

### Dynamics Software Service Management for Microsoft Dynamics™ AX

Main features	Description
SERVICE REQUESTS/TASKS	<ul style="list-style-type: none"> <li>Standard and simplified helpdesk screen for registering</li> <li>Standard repair entry form for fast service request entry</li> <li>Flexible request-status schema</li> <li>SLA deadlines per status</li> <li>E-mail notifications on status (escalation)</li> <li>Logging of changes</li> <li>Monitoring progress and statuses</li> <li>Routing</li> <li>Complaint classification, crediting</li> </ul>
PLANNING	<ul style="list-style-type: none"> <li>Graphical planning</li> <li>Drag and drop functionality</li> <li>Partial rescheduling</li> <li>Route-planning and task overviews by period, mechanic or region</li> <li>Forecast of hours and items</li> <li>Graphical view of resources assigned to service request</li> <li>Detailed information by directly zooming in</li> </ul>
WORK ORDERS	<ul style="list-style-type: none"> <li>Actual usage registration</li> <li>Flexible invoicing after assignment completion</li> <li>Multiple work orders per service request</li> <li>Documents for assignments</li> <li>Logistic support via sales module</li> <li>Workshop “baseline”, capacity in work-center, including planned maintenance.</li> <li>Closely integrated with the sales module</li> </ul>
INTEGRATION	<ul style="list-style-type: none"> <li>Microsoft Dynamics AX Accounts Payable</li> <li>Microsoft Dynamics AX Accounts Receivable</li> <li>Microsoft Dynamics AX Sales Orders</li> <li>Microsoft Dynamics AX Purchase Orders</li> <li>Microsoft Dynamics AX Projects</li> <li>Microsoft Dynamics AX Resources</li> <li>Microsoft Dynamics AX CRM</li> <li>Microsoft Mappoint</li> </ul>
OVERVIEW/ANALYSIS	<ul style="list-style-type: none"> <li>Standard and user defined queries</li> <li>Standard and user defined reports</li> <li>Compare object types</li> <li>Graph of action codes on volume axis</li> <li>Graph of action codes on time axis</li> <li>OLAP</li> </ul>

