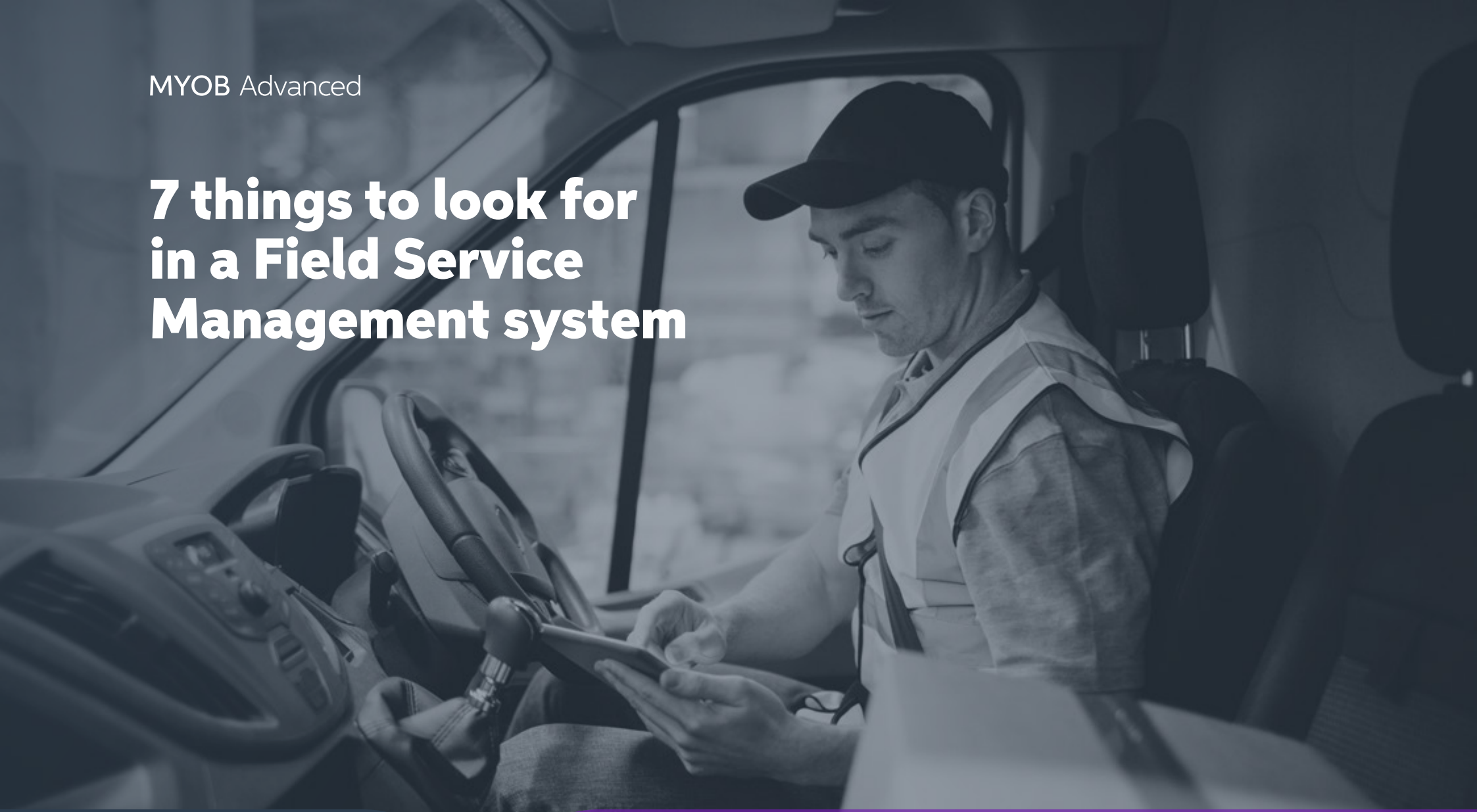
MYOB Advanced

7 things to look for in a Field Service Management system



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If you're a company that services equipment, you need to make the best use of available resources such as vehicles, equipment, parts, plus your team of talented and dedicated people. You also need to provide prompt and exceptional service.

A well-designed and properly implemented Field Service Management (FSM) system can help you accomplish all of that. With the right system, you can modernise your operations, boost your efficiency and develop lasting customer loyalty.

To choose a Field Service Management system that meets the needs of your company, focus on the following seven areas.

1. Scheduling and Dispatching
2. Mobile Technology
3. Installed Equipment Tracking
4. Inventory Management
5. Integration with Back-End Systems
6. Flexible Billing
7. Analytics

Scheduling and Dispatching

Field technicians may have numerous clients to service in a day which can be difficult to manage, especially if last-minute changes are made to these appointments. To ensure clients are happy, technicians need to get to appointments on time. An appointment time could change, or they may not have the correct address. Without access to real-time appointment schedules, field technicians could arrive late, or their own time is wasted by manually keeping track of schedules.

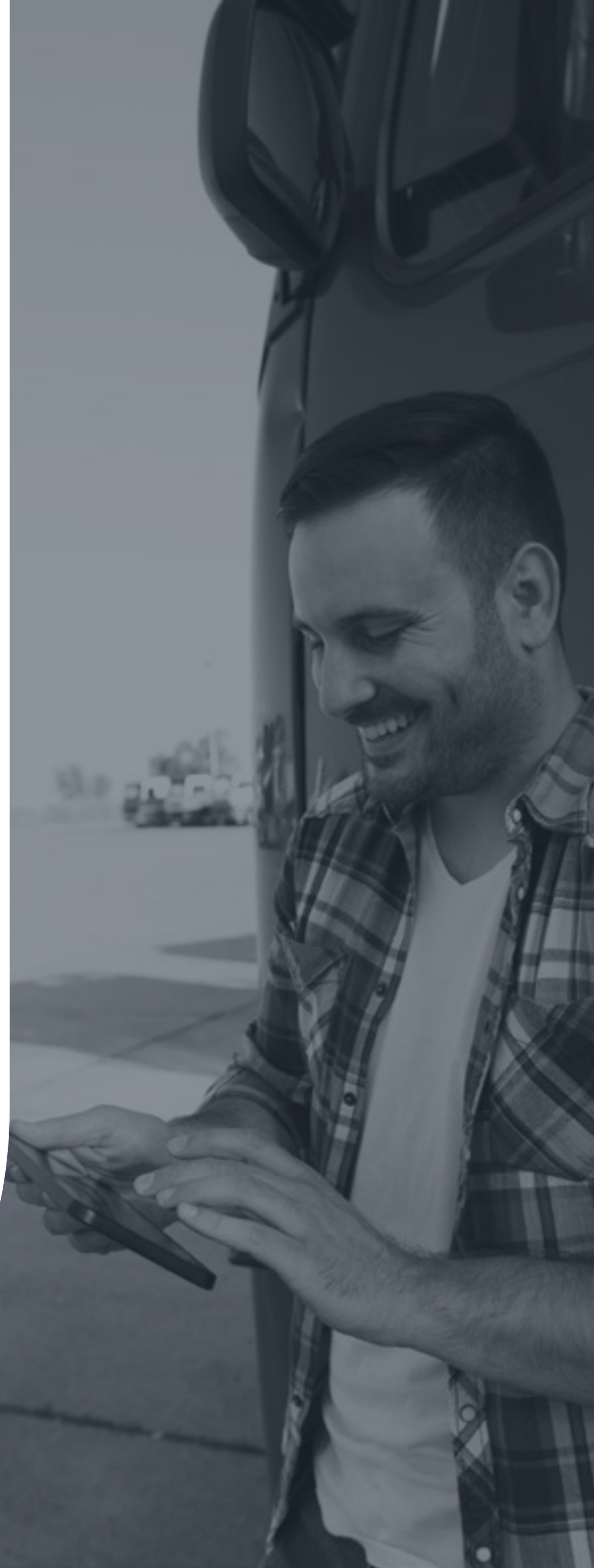
Deploying service resources (people, equipment, parts) is the essence of field service. Scheduling and dispatching are the key functions of Field Service Management systems. You'll want a system that can schedule emergency and short notice calls, along with regular and previously scheduled service calls. This minimises travel time while providing a quick response and schedule reliability that customers demand. The system should integrate mapping and GPS to allow the scheduling team to see the impact of potential responses to emergency repair requests, helping them determine the best way to respond to the change in priorities.

Scheduling and dispatching functions should be integrated with the repair and maintenance history of each customer, each piece of equipment, as well as inventory tracking. This ensures that the right parts and equipment are dispatched along with the technicians so they can get the job done with no delays.

Mobile technology

Modern field service resources MUST be mobile-enabled. This will help field technicians:

+ Stay on top of changing schedules
+ Reduce manual data entry
+ Track dispatching changes
+ Quickly create accurate reports for billing purposes instantaneously
+ Easily access equipment information, usage and repair history on-site and on the go
+ View traffic information for the best current route to the next customer site



Installed equipment tracking

Tracking installed equipment helps make service operations more efficient and effective. This information assists in the provisioning of mobile inventory and helps keep a record of maintenance and repair history. The data can even be used for analysis, planning and product improvement. Keeping records for warranty purposes is also important. However, there's even greater value to equipment tracking.

Equipment service history is a critical part of Product Lifecycle Management (PLM). Serial number tracking helps support engineering studies and product improvement efforts. It's also a necessary part of the response to litigation or product recall.

The serial number is part of the basic equipment identification that supports configuration history (as-is configuration compared to as-built and as-designed). Equipment tracking and service history are an important component of preventive and predictive maintenance. A supplier that helps its customers stay on top of certification and calibration records will be considered a valuable partner.

Just as important is the traceability of customer service. Imagine how the customer will feel when they call, and the service rep has all their equipment information right in front of them. You can help your customers keep their equipment running smoothly and reliably while making it easy for them in the process. This type of interaction is important as it makes you a partner in the safe and effective operation of their equipment.

Inventory Management

It's important to control and track your inventory of tools and repair parts across multiple vehicles and warehouse locations. Your system should help you determine how much inventory to hold and the best locations to store them. This will help provide the best coverage at the lowest cost.

Inventory can be deployed or relocated in conjunction with scheduling and dispatching. Doing so helps ensure service technicians have what they need – when and where they need it. It allows assigned tasks to be completed without wasting time. With integrated inventory and purchasing, replenishment orders can be shipped to a specific location. When the parts arrive, the dispatcher can schedule the service appointment for installation.

Integration with back-end systems

If a business doesn't have an integrated Field Service Management system, time is wasted manually entering in the same information in multiple systems which not only wastes valuable time but also increases the risk of business errors. If there are errors in financial or customer reports, businesses lose confidence to make important business decisions.

Integration with in-house systems like an Enterprise Resource Planning (ERP) system and financial/accounting eliminates delays and errors from manual entries or re-keying. The benefit is multiplied when mobile device entry from the field is included. Billing is fast and accurate, good audit trails and history are maintained with 'one version of the truth'. The resultant unified database can be exploited for ongoing improvements and savings, reports and measurements including KPIs.

Integrated FSM and ERP keeps everyone on the same page by providing company-wide visibility of customer activities, inventory usage and status, and equipment performance. Billing and collection are timelier, improving cash flow. Financial records are complete, accurate, and immediately updated as activities are completed.

Flexible billing

Your FSM system should enable you to create and process invoices in compliance with all the variations in contracts and relationships you might have with customers.

For example, the system should be able to assemble and process billing by project for design and implementation; recurring revenue for service contract and preventive maintenance; time and materials for repairs; consolidated billing for multi-site clients, or centralised payment situations.

The financial functions should also be able to track and properly recognise warranty terms, so billing or non-billing for parts and service are correct.

Analytics

Without real-time and accurate data or reporting, businesses can't see how their performance is tracking and business decisions aren't insight-driven. Without real-time insights or updates, issues could be slower to resolve.

In conjunction with ERP, a Field Service Management system manages a wealth of data. This includes equipment usage and performance, repair and maintenance, labour costs and revenue, materials and equipment, costs and needs for warranty coverage, customer relationships, inventory deployment and usage, and much more.

You need to effectively dive into this data to get the most out of your Field Service Management system. Analyse the data and look for patterns and intelligence. Cross-reference repair history with usage information and location or design details.

A well-designed and integrated FSM system can greatly improve scheduling and dispatching, equipment tracking, inventory management, plus accounting and administration. It is an essential tool for managing the service side of the business. It will help you control costs, deliver efficient service and keep your customers happy.

Key benefits of MYOB Advanced Field Service Management Edition

The MYOB Advanced Field Service Edition Field Service Management software gives you the tools to increase customer satisfaction, automate tasks, optimise scheduling and routing, better manage inventory of tools and parts and be able to integrate your analysis, accounting and administrative information in one system.

The MYOB Advanced Field Service Management system is comprehensive and customisable, 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.

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.

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To arrange a demonstration of MYOB Advanced or learn more about Field Service Management in the cloud, get in touch.

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