

Real-Time Field Service Data Tracking with ERP System

WO000932 - A+ Well Service

General Invoicing Service Location Details

Customer Service History ... Service Item Line Details Notes

Service Item Worksheet

Type	Vendor Part Number	No.	Description	Equipment Type	Price Book Code	Part #	Location Code	Unit of Measur...	Quantity	Sho...	Sun
Resource	48000		Well Service				LEVELL	WELL	12		<input type="checkbox"/>
Resource	48000		Well Service				LEVELL	WELL	12		<input type="checkbox"/>
Resource	48000		Well Service				LEVELL	WELL	12		<input type="checkbox"/>
Resource	48000		Well Service				LEVELL	WELL	12		<input type="checkbox"/>
Service	48000		Well Service				LEVELL	EACH	1		<input checked="" type="checkbox"/>
Service	48000		Well Service				LEVELL	EACH	5		<input checked="" type="checkbox"/>
Service	48000		Well Service				LEVELL	EACH	1		<input checked="" type="checkbox"/>

Total Excl. Tax Additional Discount Amt. Total Tax Amt. Total Surcharge Amt. Total Invoice Amt.

WORK ORDER : INFORMATION
 WO000932

Work Order Number: WO000932 Work Order Status: Open - Scheduled Owner: [User]

Work Order: Schedule Work Order Close Work Order (Active for 8 days, 19 hours)

PRODUCTS

Price List	The Master Group Price Book	Currency	US Dollar					
Prod...	Product	Description	Quan...	Unit Price...	Discount ...	Discount Amo...	Total Amount	Start T...
48000	Well Service	Well Service	12	1000.00		12000.00	12000.00	
48000	Well Service	Well Service	12	1000.00		12000.00	12000.00	

TOTAL

Discount (%)

Discount

Total Line Item Amount

Net Discount Amount

Target Amount

Total Amount

Total Surcharge Amount

Total

WO Status: Open - Scheduled Sync: True Sub-Status: Owner: [User]

The Customer

Our Customer is the leading provider of cased-hole and electric wireline services in the Rocky Mountain Region and the Permian Basin. Our Customer is made up of three industry-leading wireline companies that are long-time industry professionals who have leveraged the company's combined assets and customer relationships to move into fast-growing markets. API, Capitan and Cutters have all earned a reputation for high quality service, safe operations and successful long-term relationships with the top producers operating within their markets.

Our Customer is thrilled to offer established and new customers the best option for delivering new products, services and solutions through innovative and cost-effective policies and processes.

Challenge

Invoicing & Billing: As the Oil and Gas industry is a huge and extensive industry where most of the work is carried on the field. It would take days, even weeks to generate invoices and track for new tasks/work orders performed on the field.

Availability & Scheduling of Resources: As the nature of business for Our Customer is extensively on field and spread across different territories, it becomes difficult to keep a real-time track of the resources and the

equipment used in the business. The dispatchers find it difficult to manage and schedule the resources and equipment.

Communication and Authorized Access: As the business is spread geographically, it is a real challenge to keep the proper communication with the different peers of the organization. They wanted a perfect tool to sync up all the communication throughout the organization and authorize the authorized personal to get the authorized information.

Ability to work on field & Reduce Paperwork: The field engineers working on the field on different wells. They had to create handwritten work orders. They also had to manually enter the details of the work order, enter the products used and keep record of the operators working on the work order, the shift and the hours worked by the operators. On reaching the shop they had to enter the same data back in the system. This took a lot of productive time and created a lot of paperwork.

Manage multiple Price Books and Products: The field service engineers work on the field would create a work order and enter the details of the products and services with their prices used. Moreover, they had different prices for the products and services for different territories. They had to either remember or carry a lot or product & Service catalogues and price books to enter in the work order. There was always a chance of human error, they wanted to avoid this.

Calculation of Bonus and Wages: The biggest challenge faced by the organization was to calculate the bonus and wages of the operators and the field service engineers and agents. The time taken to enter the work orders into the system and then accurately calculate to wages and bonus was a real tedious task. They wanted to streamline this task wherein, in- time and accurate remuneration can be provided.

Know the Customer and Defined Business Process: The Customer details were usually maintained in a different system or excel. Customer information like addresses of different locations, Credit allowed to the customer, Discount permitted to the customer, Primary Contacts or different locations was very hard to maintain.

The process from creating a customer, sending quotation, approving, creating, dispatching and scheduling work order and then sending the completed work order to the accounts team to creating invoicing. Creating Invoice with all the discounts and other parameters was a tedious job. There was a clear way for human errors further creating delays to bill customers, impacting the cash flow. They wanted to streamline and automate this process.

Our Solution

Implemented of Dynamics CRM with Mobility and integrated with Business Central: Our Customer was implemented with Dynamics CRM

with Field Service online and Microsoft Business Central. Dynamics 365 Online helped the Field service engineers / agent to create work order online on their hand-held device. It allows them to create the work orders in online as well as off-line mode on their hand-held devices. The work orders would immediately be available on the system placed in the head office. As the work orders status was changed to completed, with the help of the Integration, Both Microsoft Business Central and CRM are in complete sync, resulting in creation of Invoice and Customer could be billed in no-time.

The Business owners, with the help of the Dashboards, Charts and Reports can find out the current status of their cash flow, the work pipeline, customer satisfaction, resource allocation and all the other required information in real-time.

Dispatch and Scheduling: The Dispatchers were relieved as, the implementation Dynamics 365 CRM they were now able to track each of the resource and schedule them. With the help of the Schedule board in Dynamics CRM for Field service the Dispatcher could easily see all the available resources, unscheduled work orders and all the information required for the dispatcher to schedule the resources to the work order and make better decision. The schedule Board is an Interactive tool which allows managing work orders using gestures like drag and drop, move and increase and decrease duration.

Smart Notifications and Authorization Access: With the Implementation of Dynamics 365 CRM communication became easy, Notification were generated on every step and it could be tracked. They are smart notification sent to the Manager and the Customer whenever the field service engineer could create, update or change the status of the work order. The District Managers are notified once the quotation was ready for approval and the field service engineers are notified when the Quotation were approved by the District Managers. New work orders are generated out of these approved quotations.

With Integration of Outlook with Dynamics 365 CRM, Emails, attachments, documents and photos could be sent from Dynamics 365 CRM and you could operate out of Outlook, these also could be tracked or shared with other authorized personals.

Microsoft Dynamics 365 gives you the ability to

create security roles which can be assigned to different users in the organization i.e. District Manager, Business Owners, Despatchers, Field service Engineers and Customers. With these security roles in place, secured access to personalized and filtered data became easier based on their roles.

Mobility and Share Point Integrating: The Field service Engineers could easily create work orders, update work orders or change the works orders status on the fields from their hand-held device with the help of Dynamics Mobile App. If the Field Service Engineers were in a remote location with no internet access, still, they were able to perform the above activities in the offline mode without the need of the internet. So, whenever there no internet available they could create or update the work order and it would easily sync once they reach in the range where Internet is available.

Mobile App can scan the bar code and can pull the item inventory details. Items can be added by simply scanning the bard code. It can show contact detail, lead detail based on QR code. Takes signature of client supervisor on device after the work order finishes.

With Integration of SharePoint, Centralization of data was possible. Structure can be create in Share point to store Manual, Product Catalogues, Price Books, Documents, photos, attachments and other information. Duplication of Data was avoided because of centralization. It was possible for every personal to easily search the required document and share it with any authorized personals required.

Storing and accessing Product, Services and Price Books: Dynamics 365 has the functionality to maintain different price books with different prices for the same product. There was a need to maintain a huge variety of products and services and the prices of these products and service would vary as per the territories or other parameters. With the out of box functionality of Dynamics 365 different product catalogues, Services Catalogues and different price books can be stored and maintained, they could be utilized in the same work orders as required.

Efficient and Error Free Calculations of employee remunerations: Dynamics 365 and Business Central Integration helped in achieving a seamless and accurate calculation of employee remunerations. The details of the work order

were passed from Dynamics 365 to business central once the work order was completed. With the parameters already set in Business central, calculation of wages and bonus were automated and accurately obtained.

360° Customer View and Automated Business processes: Dynamics 365 provides you with a 3600 Customer View. It allows to update and maintain the customer related information on a single screen. Same customer with different locations and primary contacts can be maintained. It also allows you to know most active and passive customer and also provides you with the ability to know the customer satisfaction level.

Dynamics 365 and Business Central integration helped to define and automate the business process of the customer. Sales persons could now create quotations for customers, an automated smart notification was sent to the district manager for approval. On the approval of quotation, the quotation would convert into a work order.

Field Service Engineers were notified via email on assigning the work order.

Once the work order was completed the stake holders were notified and the details of the work order were passed to Business Central, which could automatically calculate the bonus, wages and would also create Invoice which was ready to be billed to the customer.

About Infinite

Infinite computing systems is a Microsoft Gold Partner that helps clients innovate in their businesses, improve customer relationship and increase operational efficiencies through the use of Microsoft Dynamics 365 CRM, Business Central, BI, Data analytics and Dashboards, .NET, Power BI, Mobile Apps and Microsoft Azure.

Infinite Computing Systems has been delivering exceptional value to its clients for 20+ years by combining onsite, local experts with the strength of global development resources. Infinite has extensively worked in the Oil and Rigs Domain. With the help of this extensive experience Infinite is proud to present a CRM solution specially developed for the Oil and Rigs Industry. With the help of this solution the organization is empowered to work efficiently getting bigger and better ROI's.

