Project management and field service management

with Microsoft Dynamics GP

Microsoft Dynamics GP:
The proven solution for efficiency and insight across your business.

Microsoft Dynamics GP

▶ More than 40,000 customers use Microsoft Dynamics GP.
And for almost that many reasons.

Why do tens of thousands of customers rely on Microsoft Dynamics® GP business management solutions? The reasons are diverse. For many, it's because it's backed with years of proven performance, while continually being a leading innovator. Another reason is that it meets the needs of many businesses like yours, with easily customizable solutions that go beyond basic business management and reporting to help people companywide work faster and smarter.

Many more customers are moving to Microsoft Dynamics GP right now, because it excels at meeting the business needs that are particularly relevant today, such as turning data into insight, making smarter decisions, and increasing efficiency.

"When we did the analysis, we thought it would take about a year and a half to two years to reach a breakeven point from the original costs for the rollout of the service software. We actually found we were able to meet our total cost return within the first quarter of using Microsoft Dynamics GP."

—Jim Adank, Chief Information Officer, DMS Health Group

NOW
YOU CAN

Increase profitability by connecting project activities to company financials and transforming field service activities from a cost center into a profit center, with Microsoft Dynamics GP.

Creates insight. From built-in reporting to sophisticated data analysis, Microsoft Dynamics GP helps identify trends and risks proactively rather than reactively. With field service, for example, it means knowing how to best coordinate open service requests with upcoming preventive maintenance calls. Microsoft Dynamics GP gives everyone in an organization access to relevant information, using the Microsoft® Office tools they know so well. This can lead to big cost savings, strategic business decisions, and informed, empowered people from the boardroom to the field.

Increases efficiency. Microsoft Dynamics GP looks like, and works with, the Microsoft applications people already know and use. Easy customization gives your employees the exact information and tools they need to maximize their effectiveness and efficiency. Microsoft Dynamics GP also connects your people and your systems, fueling teamwork, increasing accuracy, and reducing steps for routine tasks—freeing employees to focus on what matters most to your company.

▶ More visibility into your data.
Less time hunting for answers.

Capturing and recovering project costs—such as billable labor and project-related expenses—can help feed your company's profit margins. Microsoft Dynamics GP can help improve your visibility, by connecting project activities to your company's financials. The result? Extensive reporting capabilities, accurate accounting and billing processes, streamlined time and expense management—and increased profitability.

> "With Microsoft Dynamics GP, we can see the total budgeted cost associated with a project, and we can view this cost at a number of levels, helping us run the reports that we need."
>
> —Kenneth Boothe, Jr., Program Manager, Erie Shipbuilding

▶ Stop wasting valuable time.
Start trimming waste.

The project management capabilities of Microsoft Dynamics GP can help you streamline inefficient project processes—like data reentry—that can eat away at hard-earned profits. It can help shorten cash collection cycles, increase the value of invoices, reduce project-related paperwork, and automate once-manual processes. You can also track and control change orders by baseline or by forecast. And automate invoicing processes to meet project-specific needs by tailoring billing options and invoice formats. To better manage projects, you need timely and accurate information. Microsoft Dynamics GP provides easy access to the information and templates you need to do your job quickly and efficiently. Plus it helps you go beyond basic reporting to identify important trends in your business.

FOUR TOP REASONS
to use Microsoft Dynamics GP connect project activities:

- Increase visibility and control of time and expense entries; project status and profitability; labor, equipment, and materials; and employee expenses.

- Improve efficiency throughout your business with centralized access to information—on-site or at the office.

- Increase cash flow and profitability through automatic integration with your billing system.

- Improve customer invoice accuracy and automate processes to meet project-specific needs by tailoring billing options and invoice formats.

▶ Better manage projects.
With the right information.

The Microsoft Dynamics RoleTailored interface makes it easy, giving you and your team access to the right information using role-based dashboards and key performance indicators. For example: Project managers can track work in progress, completion rate, and earned revenue from a personalized dashboard displaying the exact information they need.

▶ ## Improve field service operations.
Without getting stuck in profit sinkholes.

Maintaining excellent field service operations is critical for customer satisfaction, but the complexity of managing the many moving parts can turn these processes into profit sinkholes. The field service management capabilities of Microsoft Dynamics GP integrate directly with your company's accounting and distribution systems— integration that helps you manage field service operations with higher levels of profitability and customer satisfaction.

▶ ## Build strong customer relationships.
And boost customer satisfaction rates.

Microsoft Dynamics GP provides comprehensive customer support, from quick and efficient dispatching of the right technician for the job, to on-the-go support that provides technicians with complete customer histories, to Web-based tools that help customers report service issues and initiate product returns themselves.

PLUS
Microsoft Dynamics GP can help your field service management business:

- Service products across life cycles.
- Monitor quality of products and technicians.
- Increase productivity and efficiency.

FOUR TOP REASONS
to use Microsoft Dynamics GP to transform field service activities

- Turn every service call into an opportunity for higher profit and customer satisfaction.
- Administer contracts with greater accuracy and revenue opportunity for more accurate billing and compliance with service agreements.
- Practice proactive maintenance: Use tracked details of preventive calls to forecast purchasing and scheduling requirements.
- Manage returns more effectively: Easily track repair and return status, issue credits, and meet customer and vendor requirements for product and part returns—even generate required forms with a single click.

▶ ## Turn service centers.
Into profit centers.

Microsoft Dynamics GP helps you easily access the business information needed to optimize field service processes. And while you are at it, boost profits by:

- Increasing technician productivity with automated, built-in process management.
- Generating ad hoc reports to track profitability, technician utilization and workload, and parts usage.
- Proactively initiating contract renewals.
- Tracking every call against contract or service warranties.
- Maintaining unlimited contract price books and monitoring profitability against service calls.
- Recognizing revenues through five different methods.
- Creating and converting customer quotes for multiple service levels and options.
- Automatically renewing contracts—or repricing and reissuing updated contracts.

▶ PROJECT MANAGEMENT MODULES

Project Accounting: Connect project activities with company financials; provide extensive reporting capabilities; help ensure accurate accounting and billing processes throughout project life cycles; and streamline time and expense management.

Project Time and Expense for Business Portal: Empower project team members and managers to effectively capture, review, and approve project time and expense data on the Web, enabling prompt, accurate customer invoicing and efficient reimbursement for out-of-pocket employee expenses.

▶ FIELD SERVICE MANAGEMENT MODULES

Service Call Management: Enter customer service requests; dispatch technicians; and manage parts, labor, and miscellaneous charges. You also can bill customers for time and material services.

Contract Administration: Enter, set up, and maintain your quote and contract documents. If Contract Administration is integrated with Service Call Management, contract costs are updated from service calls and contract terms update service calls. Contract Administration also will send transactions to General Ledger for revenue recognition purposes.

Depot Management: Provides tracking and maintenance of in-house work performed for items belonging to a customer or to a servicing company.

Preventive Maintenance: Automatically generate service calls for preventive maintenance work with a minimum of user intervention. You also can use Preventive Maintenance to create a list of preventive maintenance requirements and track preventive maintenance history on generated, cancelled, and completed preventive maintenance requirements.

Returns Management: Enter, set up, and maintain your return materials authorization (RMA) and return to vendor (RTV) documents. If Returns Management is integrated with Service Call Management, an RMA is created automatically from a returnable parts line on a service call. If Returns Management is integrated with Sales Order Processing, you can select items directly from the historical Sales Order Processing invoice that was generated for a specific customer.

Erie Shipbuilding: Streamlines accounting and supports growth with business software.

Since 2005, Erie Shipbuilding has provided services that include the building, repairing, and converting of cargo vessels. Erie Shipbuilding had accounting software in place for financials, order entry, and purchase orders, but found that it needed production statistics and more attention to detail to meet companywide growth. To track work in progress, determine percent completion, and calculate earned revenue, Erie Shipbuilding implemented Microsoft Dynamics GP. Since then, Erie has gained newfound insight into project status based on task and labor hours and has achieved the functionality it needs to provide accurate estimates on future projects.

For more information:

Microsoft Dynamics GP