

# A day in the life of a Field Service Engineer, with Dynamics Advanced Field Service from HSO

Today's service organisations are faced with increased competition, advancing technology, and an ever-evolving workforce. In order to maintain competitive advantage, streamlining operations is key.

Dynamics Advanced Field Service from can help achieve these objectives, no matter what your industry or what you're servicing. Let's take a look at a day in the life of a Field Service engineer to see how.

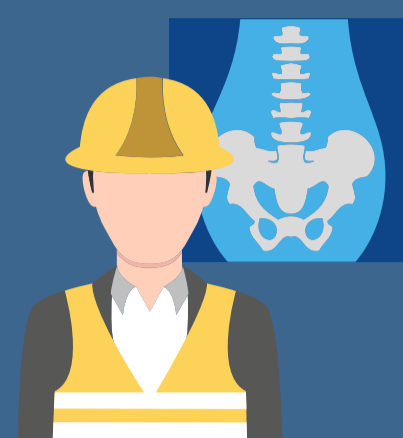


Hover over the symbol to reveal more benefits

## Scenario:

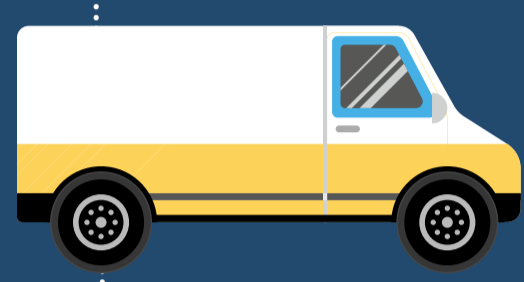
- Business:** Original Equipment Manufacturer (OEM)
- Products:** X-ray machines
- Service provided:** Installation, maintenance & repair
- Customers:** Hospitals, dental & veterinary surgeries
- Customer locations:** Various

## Set Up:

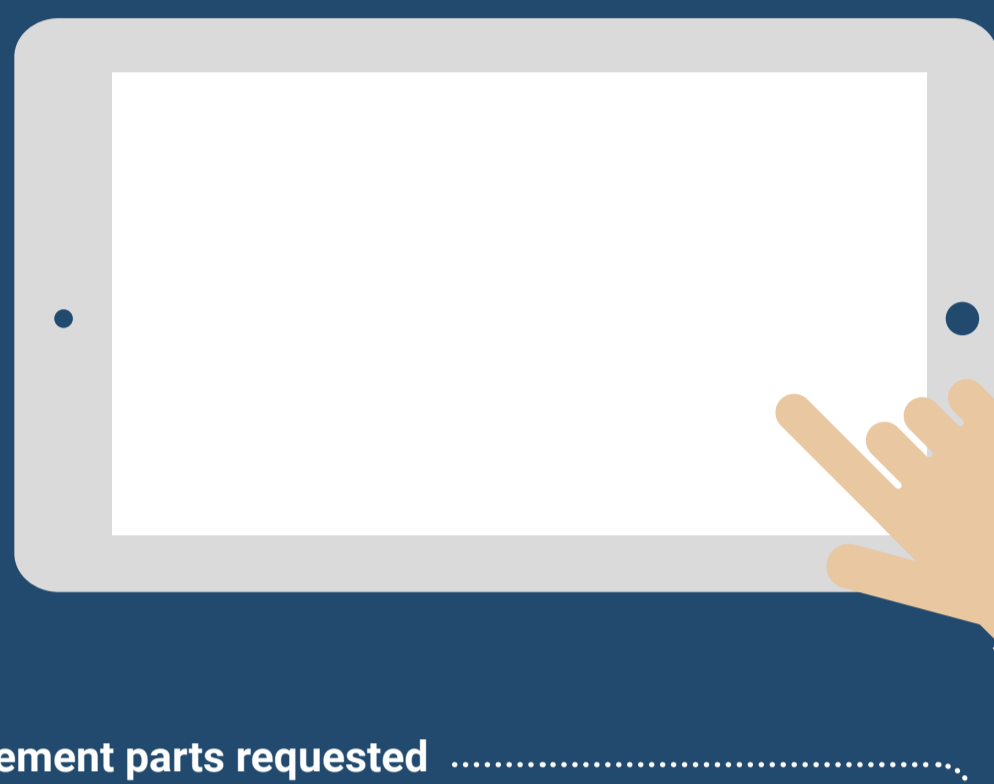


### 8:30 Customer A - X-ray machine overheats, service request is logged

### 9:30 The engineer arrives on site



- The engineer updates the work order with their arrival time
- The engineer then consults with the client and obtains any background information on the issue



### 11:00 Replacement parts requested

- The engineer discovers one of the fans has stopped working
- Without the specific part in van stock, the engineer needs to request a replacement from the warehouse
- The engineer uses a mobile device to request the part in Microsoft Dynamics 365
- Replacement fan is ordered and a purchase order is raised



### 11:30 The engineer is assigned the next job



### 12:30 The engineer arrives on site – Customer B



### 13:30 Client confirms work has been done

### 13:00 Completes job

- The checklist and client confirmation is uploaded into Microsoft Dynamics 365
- The engineer takes photos of the working X-Ray machine on his/ her smartphone and uploads them to Microsoft Dynamics 365 with supporting documents
- The client is automatically billed and sent a satisfaction survey
- The work order and case are closed on Microsoft Dynamics 365
- The engineer stops for lunch, checks Microsoft Dynamics 365 for their next job and sets off

**Using the work order checklist, the engineer ticks off:**

- Initial health check
- Secure working area (free from glass)
- Access relevant equipment documents / information sheets
- Assess issue
- Identify relevant part needed for replacement
- Replace glass
- Final test

### 10:00 Next day: Part received, for Customer A



The case alerts the engineer by SMS that the part is ready for collection. The engineer collects the part and heads back to the client

- The engineer completes checklist:
  - Fix issue
  - Final test
- The client confirms the work has been done
- The checklist and client confirmation is uploaded into Microsoft Dynamics 365
- The engineer takes photos of working X-Ray machine on his smartphone and uploads with supporting documents to Microsoft Dynamics 365
- The client is automatically billed and sent a satisfaction survey
- The work order and case are closed in Microsoft Dynamics 365

### 15:00 The engineer completes job and moves on to the next one

## Dashboard reporting

- Using Power BI, service organisations can monitor visit progress, track calls, SLA breaches, work carried out, and utilisation of time. The ability to send monthly reports allows businesses to keep their customers updated with how engineers are performing against SLAs.
- Intelligent Cognitive Services and Machine Learning enable managers to identify trends, helping to determine the cause of any regularly occurring issues in order to take a proactive approach to support.
- In addition, customers are automatically sent a satisfaction survey upon confirmation of each job completion. Field Service organisations can improve their service and increase their profits by analysing social sentiment and raising service requests automatically in response.



## Microsoft Dynamics 365 & Dynamics Advanced Field Service from HSO

With customers continually demanding higher service levels, accomplishing more with less staff is no easy feat. This is just one scenario where Dynamics Advanced Field Service can help.

Our solutions can work across a variety of industries with a multitude of specific scenarios, from vending machine to gas boiler manufacturers & suppliers. We can help you get the right field technician to the right place at the right time, optimising your Field Service and Equipment Management operations.

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