

# MYOB Advanced Business



## Field Service Module / Service management.

The MYOB Advanced Field Service module delivers a complete set of functionality for field service operations. Streamline processes to reduce response times and costs, resulting in increased revenues and customer satisfaction that ultimately give you a competitive advantage.

### Optimal Route Planning

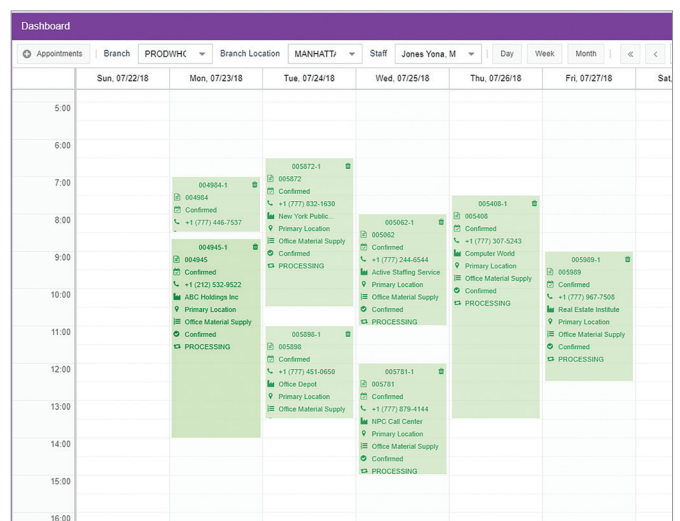
Optimise routes for appointments with the ability to filter appointments by several different criteria. Routes are graphically plotted in maps for each service person with lists of required resources (equipment or machine). Graphical displays show the routes and order status with different colours, enabling dispatchers to rapidly respond to problems and make route changes. Routes are designed to minimise drive time and changes to the route are instantly redrawn and available on the field technician's mobile device.

### Inventory Management

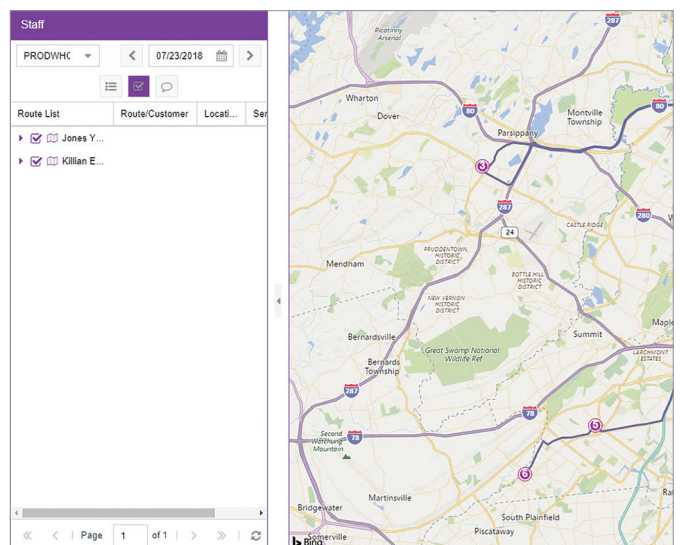
In field services, tools and repair parts are typically spread across multiple vehicles and warehouse locations. With MYOB Advanced Field Service module, you can control and track these locations and costs. Since inventory and purchasing are integrated, replenishment orders can be sent to a specific location and, when the parts arrive, the dispatcher can schedule the service appointment for installation.

### Service Contract Management

Recurring service contracts are a significant source of revenue. Visibility on renewal dates for each contract helps preserve the revenue. Dashboards can alert the service team of expiring contracts. Your team can create and manage multiple service schedules per customer and fine-tune appointments using the Schedule Calendar Board for staff and resources.



Employee scheduling



Route planning

### Features and Capabilities

#### Mobile service management

Keep your staff members connected through any browser-enabled device or using the native mobile Android and Apple iOS (iPad) app. Offer staff access to service information and customer data from anywhere at any time. MYOB Advanced runs on the entire spectrum of mobile devices, important for companies using laptops rather than small devices like phones.

#### Emergency Service Calls

Use visual tools to add unplanned service calls. Find out how changes to planned routes will affect the team with the least amount of impact to the planned schedule. Have the new service order sent to the technician's mobile device.

#### Equipment maintenance

Record the history of equipment or machines installed at each customer site and track repair parts in stock. MYOB Advanced stores the equipment records from quoting through order, delivery, installation, and service work in the field. Information includes manufacturer, model, configuration, and scheduled preventive maintenance orders. Customer equipment can be associated to recurring schedules and contracts in MYOB Advanced Customer Management.

#### Warranty management

Establish warranty offers for your customers, specifying which parts are under warranty to avoid confusion, mischarges, and objections. Multidimensional contracts (different warranty periods for different components of the system) help to track warranties from sales to repair in the field, specifying what is covered and what is not. This helps ensure billing accuracy and improve customer satisfaction.

#### Dashboards and business intelligence

Create personalised dashboards easily and turn raw data into rich visuals to track progress and spot trends as they happen. MYOB Advanced's business intelligence can also leverage Microsoft Power BI to deliver insights from multiple data sources that are key to your business.

#### Team approach to sales and service

Customer Management (CRM) is part of MYOB Advanced, not a loosely integrated module. From marketing, quoting, bidding, to installing and field services, the customer information is visible throughout the organisation providing a 360-degree field of all customer interactions. When selling equipment, the installation appointment can be scheduled while the user is in order entry.

#### Track project costs

Field Service Management is not just for small projects. When the installations are very large (tasks, people, or equipment), all the costs (time, materials, and expenses) of each phase of the project are tracked in MYOB Advanced Project Accounting. Compare actual project costs with original and revised budgets in real time.

### Key benefits

#### 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.

#### Optimize 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.