

Dynamics 365 Field Service Implementation

A Covenant
Technology Partners
Case Study

What was their business problem?

The tech service company had an outdated Service module that required all manual input, handwriting on tickets by technicians, and manual spreadsheet tracking against service agreements. The business had a sustainable growth rate of over 20% each year and this model was not aligned with their growth.

What was our solution to solve the problem?

Dynamics 365 Field Service was implemented with the existing D365 Sales solution to give new and greater insights into the service delivery side of the business. Service Agreements, purchasing, and sales were automated with a supporting integration to ERP. Technicians turned around Work Orders faster, resulting in faster payments from customers. Dispatchers were able to quickly identify the right resources for the work.

What are the results/outcomes?

The tech service company was able to immediately take advantage of the features D365 Field Service had to offer, scaling their service and delivery department to meet the needs of the business. Manual spreadsheets were eliminated, new reports and insights were gained by the business, leading to fast and more informed decision making. Materials and parts delivered to customers were recorded consistently, increasing revenue and reducing inventory shrinkage.

Dedication. Innovation. Results.