

Service Management

Service Management in Microsoft Dynamics NAV 5.0

BENEFITS:

- **Enhance operational efficiency.** Create a more productive work environment with tighter control over parts inventories, costs, workloads, and task prioritization.
- **Help improve service order management.** Streamline the generation, dispatch, completion, and invoicing of service orders and more easily specify and track parts consumption when you have improved access to up-to-date information about contract agreements, pricing, task prioritization, and the skills and workloads of service technicians or teams.
- **Effectively manage contracts.** Set up and track warranties and service level agreements (SLAs) and contractual service periods or response times so your people can automate related service orders, capture data on contract fulfillment and history, and help ensure more profitable quotes and agreements.
- **Build customer loyalty.** Become a more valued supplier when your people can provide proactive service, consider customer histories and preferences in dispatch decisions, and implement customer-specific pricing and discounts.

Create a competitive edge with superior customer service operations that build customer loyalty while fueling profitability.

The screenshot displays the Microsoft Dynamics NAV 5.0 Service Management interface. The main window is titled '21 Graphic Program - Service Item Worksheet'. It has tabs for 'General', 'Customer', 'Shipping', and 'Details'. The 'General' tab is active, showing fields for Document No. (50000018), Service Item No. (21), Item No. (80201), Service Item Group Code (GRAPHICS), Serial No. (1234567), Fault Reason Code, Document Type, and Loaner No. Below these fields is a table with columns 'T. No.', 'Descr...', 'R.', and 'I.'. The table contains one row: '80218 Hard D...'. Overlaid on the main window is a 'Service Item Information' dialog for '80218 Hard Disk Drive - Item Tracking Lines'. It has fields for 'Quantity' (1), 'Qty. to Handle' (1), 'Qty. to Invoice' (0), and 'Item Tracking Code' (FREEEN...). Below this is an 'Item Tracking - Select Entries' dialog with a table of tracking entries. The table has columns: 'Lot No.', 'Serial No.', 'Total Qu...', 'Total Re...', 'Current ...', 'Total Av...', and 'Selected...'. The table contains 10 rows of data for serial numbers S-130 through S-280. At the bottom of the dialog are 'Selectable', 'Selected', and 'Undefined' checkboxes, and 'OK', 'Cancel', and 'Help' buttons.

Lot No.	Serial No.	Total Qu...	Total Re...	Current ...	Total Av...	Selected...
	S-130	1	0	0	1	
	S-145	1	0	0	1	
	S-160	1	0	0	1	
	S-175	1	0	0	1	
	S-190	1	0	0	1	
	S-205	1	0	0	1	
	S-220	1	0	0	1	
	S-235	1	0	0	1	
	S-250	1	0	0	1	
	S-265	1	0	0	1	
	S-280	1	0	0	1	

With accurate tracking of parts, you can more efficiently manage and allocate service items while gaining insight into the costs associated with your service orders.

Service Management in Microsoft Dynamics™ NAV can help your organization respond to customer service requests, organize resources for maximum efficiency, and boost customer satisfaction. Tightly integrated information can give you the insight you need to make profitable decisions about the costs, inventories, workloads, and financial returns of your service operation.

FEATURES:

Service order management	Capture information about open service quotes, quickly create service orders based on customer requests or after-sales issues, or accept the system-generated suggestions to open an order based on periodic service or contract obligations. Then easily log service order completion for complete records and profitability management.
Contract and SLA management	Manage SLAs, contracts, or warranties to anticipate service needs, meet obligations for service periods or response times, record customer preferences for technicians or service appointments, and proactively schedule service. Record actual response times, track associated service parts and labor, automatically generate contract invoices, and easily analyze contract profitability.
Work and material planning, scheduling, and dispatch	Define typical time, material, and resource requirements for a specific service type; track skills and availability of service personnel and field technicians; and then assign service orders to best utilize available resources. Prioritize and escalate tasks as needed with clear insight into open service orders, contract commitments, and technician workloads.
Service item tracking	Track service items and parts, including serial numbers, inventory, costs, and individual profitability. Accurately track, allocate, and analyze crucial data about items, costs, and jobs.
Item and component service histories	Register and track serviced equipment, including site locations, components, loaned equipment, and repair or replacement history. Speed troubleshooting by capturing previous service activities and providing guidelines and procedures for solving future service issues.
Price management	Set up and maintain service prices including fixed minimums or maximums, customer-specific pricing, diverse types of charge, and price groups. Convenient price calculation templates help you adjust for various price structures, service parameters, and profitability targets.
Reports	Access, analyze, and understand the performance and profitability of service operations quickly by generating reports on performance measures such as current open service orders, response rates, and service item and contract profitability.

For more information about Service Management in Microsoft Dynamics NAV, visit www.microsoft.com/dynamics/nav.