

FIELDPOINT | 2020 WHITE PAPER

FIELDPOINT AND BUSINESS CENTRAL'S INTEGRATED RELATIONSHIP

Put the power of Fieldpoint and Microsoft Dynamics 365 Business Central together to form a powerful field service team.



Choosing the right field service management software can be a difficult task. Not only do you want a breadth of functionality that handles all your service needs, but you also need a system that combines seamlessly with other important systems your business is going to use. Your priority as a field service business is to implement a system that, first and foremost, handles your service needs, and then pairs it with a powerful ERP system for a successful end-to-end connection.

At Fieldpoint, we enhance your service delivery by doing what we do best, and that is helping to manage your operations through our complete field service software solution to scale your business to the next level.

While some CRM and ERP systems come with their own field service management solutions, their capabilities are not as feature rich as a full field service software solution. Any field service business should be looking at a system that:

- Completes work order automation
- Offers enhancements to scheduling and routing
- Makes technicians more efficient with a mobile field service app
- Enables emergency, contract maintenance and installation projects in the same system
- And has powerful analytical, job costing and reporting functions

And then from there, add in a powerful integration to an ERP system, like Microsoft Dynamics 365 Business Central, to perform its specific role in supplementing your field service software. With Fieldpoint's integration to Business Central, we have taken the risk out of combining two powerful systems to form a complete, end-to-end solution for all types of field service businesses. If your business is field service, you need to start with a field service software that is going to offer you the best applications to do your job. And then combine it with an ERP system that works with your field service system to form a winning combination.

Mapping of Data

Sharing data is one of the primary benefits of integrating field service software with an ERP system like Microsoft Dynamics 365 Business Central. Data and information are constantly changing and having mapped out lines of connection between Fieldpoint and Business Central will reduce the risk of errors in data transferring, and eliminate the need to re-enter data that has already been entered into one system.

Fieldpoint and Business Central have mapped out lines between each other. Customer information from your ERP system populates customer information in Fieldpoint. Changes made in one system are reflected in the other system. This level of integration is the basis for which the entire end-to-end experience is founded on, as if two systems are not completely synced together, there are chances for errors and a redundancy in data entry.

A SHARED SYSTEM OF INFORMATION AND DATA THAT REDUCES THE RISK OF ERRORS

From the moment you initialize your Fieldpoint system, you are benefiting for the connection with a Business Central integration. From the ERP system comes the data and information that will populate your Fieldpoint system, including:

- Customer profiles, including names, address, and contacts
- Vendor information for purchasing
- Product lines for all inventory items
- Stock locations for warehouse information
- Employee profiles for full-time technicians and subcontractors
- Additional contacts

Whether you are requisitioning parts on a work order, creating a preventative maintenance schedule, or planning an installation project, all the data needed to complete those processes has come from the Business Central ERP system. Fieldpoint's functionality gives field service businesses the tools to complete these tasks with the shared information coming from the ERP system. Now, regardless of the type of service being offered, all the information and data is the same because of these mapped channels, ensuring accuracy in the service work, parts requirements and any invoicing or billing that is completed as a result of the service work being completed.

Work Order and Sales Order Relationship

The integration between Fieldpoint and Business Central is supported by the connection between the Fieldpoint work order and the Business Central sales order. It is through this relationship we see the benefits of an integrated system, levels of automation, and the accuracy described in data mapping. This relationship ensures the service work and parts added to a work order are successfully transferred to your ERP system for billing purposes.

In Fieldpoint, when a work order is created and a part is added, an adjoining sales order is produced. Any parts and inventory added to that work order will also be added as line items on the adjoining sales order in Business Central. When work is completed and labor hours added to the work order, that work order can be quickly invoiced and posted to the Business Central sales order with full and accurate detail of the hours and parts used to complete a service call.

This relationship between the work order and sales order eliminates inaccuracies when transferring information to the sales order for billing purposes. It gives Fieldpoint users a level of automation where they can generate invoices in Business Central, without having to login to the Business Central product itself, completing everything from within Fieldpoint. It takes what is a complex and often labor-intensive activity of turning a work order into an invoice and automates the process. And now the service department can live in their own environment, while accounting can live and their own, but share the same information for billing purposes.

Visually, the Business Central sales order number is attached to the work order, while in Business Central, there is built-in Fieldpoint columns for work order numbers, requisitions and contract or project information, further providing great proof of the adjoined relationship between the work order and sales order.

The sales order number will appear on the Fieldpoint work order, and inside the sales order in Business Central, there will be a list of Fieldpoint information, such as the work order number, contract number or project number that is associated with the sales order for easy reference when looking into the other system.

Inventory and Purchasing

Field service often requires parts to complete a repair. Knowing where those parts are and how many you have will help you be more accurate in your service timelines, and give you an accurate indication of what you have on hand and what parts you need to purchase. On the Fieldpoint work order, add parts to a service call and get a real-time and accurate account of your inventory with the number of parts on hand and where they are located. Through the integration with Business Central, now your field service team producing service calls, have the information on parts they need, available to them at the point of requesting parts.

STAY IN THE FIELDPOINT SYSTEM WHEN PURCHASING, BUT HAVE THE POWER OF BUSINESS CENTRAL BEHIND YOU

If the part is not in inventory, or it's a specialty item that needs to be ordered and isn't kept in stock, a requisition request can be made directly from Fieldpoint, and fulfilled in Fieldpoint, without having to leave the application. A purchase order in Business Central can be created for parts not in stock in Fieldpoint, and a requisition completed with the vendor the parts will be purchased from and where they are being shipped too.

With the integration, all the purchasing power of Business Central is now conveniently located in Fieldpoint. Your service managers can complete an entire purchase from their Fieldpoint system, without needing credentials to access Business Central, saving your money on licensing fees, while also keeping them in one field service software. Fulfill individual parts, an entire purchase order, or specific parts on a purchase order as are needed to complete a job.

Customer Invoicing

Parts, expenses, and labor hours transferred from the Fieldpoint work order to the Business Central sales order can immediately be turned into invoices, either from within Fieldpoint, or within Business Central, depending on the process your business has. As service work is complete, technicians can generate an invoice when closing an invoice on the MobilePro field service app, or it can be done through the Fieldpoint system. Single work orders can be invoiced, or a batch of work orders can be sent straight to Business Central when posted in Fieldpoint.

By posting the batch in Fieldpoint, the sales order is removed from Business Central, and turned into a Posted Sales Invoices in Business Central. Due to the relationship between the Fieldpoint work order and Business Central sales order:

1. Parts entered are accurate, with proper part costs and pricing.
2. Accurate labor hours input by the technician in the field through the MobilePro app are priced accordingly and attached to the sales order when posting the work order.
3. Expenses input by the technician that are billable end up on the sales order to be billed back to the customer.

These items are then turned into an invoice and sent to the customer, either from within Fieldpoint, or from within Business Central, depending on your businesses processing of invoices, automating the invoicing process. It takes the complex nature of invoicing and makes it easier for both the service department and accounting department.

.....
With the integration to Business Central, ensure accuracy in invoicing, as parts, expenses and labor hours are transferred from the work order in Fieldpoint to the sales order in Business Central, which can then be turned into an invoice. No need to re-enter information from one system into the other to finish the invoicing process.
.....

Projects

Fieldpoint's project module is a full host of functionality to complete installations, retrofits, and upgrades. And with the integration to Business Central, it creates a powerful team to complete the largest projects your service team has to complete, with the power to utilize the entire resource pool of technicians to complete the job, do job costing and analytics on the project, and have a full scale purchasing and inventory system for project work.

Project job costing is completed in Fieldpoint to give service teams an estimated breakdown of how long the project will take, what the project will generate in revenue, the costs to complete the project from labor hours to parts, and how to allocate those parts, resources and materials to finish the job.

TACKLE YOUR LARGEST INSTALLATION PROJECTS WITH THE PURCHASING POWER OF YOUR ERP

The integration with Business Central acts as the purchasing system for projects who have to purchase larger volumes of parts, complete requisitions of those parts, have them shipped to a warehouse or drop-shipped to a specific location, such as where the installation will take place. As requisitions are made, sales orders are generated for parts, equipment and any labor hours associated with the project. Billing triggers can be set up in Fieldpoint's project module to automate the invoicing process. Set varying intervals, bill on reaching milestones, time and labor costs, or a variety of other options to ensure cashflow remains solid through the life of the project.

This is an example of using the best of breed field service software system for extensive service work, gaining all the valuable tools to deliver projects on time, while having an integrated system to handle purchasing and invoicing. And both Fieldpoint users and Business Central users have greater insight into the project through the integration, to ensure it's coming in on time and on budget.

Preventative Maintenance Contracts

The integration with Business Central also ensures contracts are fully automated. While preventative maintenance schedules automate the work order creation process, ensuring no service call is missed, automated billing ensures your contracts are billed on time each month. A Business Central sales order is generated for each contract for the services your business provides with the accurate contract lines to be charged.

Field service automation is on full display in Fieldpoint's contract module, and an integration with an ERP system like Business Central adds another level of automation in the invoicing process. Now the service and accounting sides of your business are experiencing the benefits of field service automation, and ensuring contract agreements are met with on-time service, and customers are paying for their contracts on-time with invoices generated to get them into the hands of your customers faster.

All-In-One Field Service Management

When Fieldpoint claims to be an all-in-one field service management solution, it is through integrations with other systems that this is achieved. Fieldpoint is designed to manage the service side of the business. We have expertise in work order management, scheduling and routing, and projecting management and job costing. And we rely on our integration to Microsoft Dynamics 365 Business Central to handle the invoicing, purchasing and the levels of information needed to populate the Fieldpoint system so that you can offer more efficient, automated service.

Field service management requires systems to work together. Fieldpoint has developed a library of ERP, CRM and accounting integrations, such as Business Central, to help our customers grow their business, automate the processes that they use every day, and become a lean running field service business that has the tools and abilities using field service software to grow and scale their business in the future.



ABOUT US

Fieldpoint Service Applications is a developer of field service software. Our specialized integration with CRM, ERP and accounting systems provide our customers with enterprise visibility while streamlining sales and service operations. With over 25 years of experience, hundreds of valued customers in several verticals, and a solid network of reselling partners, Fieldpoint enables service organizations to run leaner, smarter and more profitably.

Fieldpoint Service Applications, Inc.

2660 Sherwood Heights Drive, Unit 103
Oakville, ON L6J 7Y8
Toll-Free: 1-866-336-5282
Phone: 1-905-855-2111
Fax: 1-905-855-2116
Email : sales@fieldpoint.net

