



DESIGN, STORAGE AND HANDLING OFFER GREATER SUPPORT WITH FIELDPOINT'S FIELD SERVICE SOFTWARE

Challenges

- Limited visibility into service history
- Took more than a couple of weeks to produce invoices
- Extensive time administrating service technicians and contracts
- Manual data entry led to redundancies with financial entries

Results

- Service history is now at their fingertips
- Click of a button invoice production
- Improved utilization of technician administrative time
- Completely streamlined service to financial integration
- Proactive services and support from the implementation consultant

Prior to Fieldpoint, DSH used a manual work order system, so they had no way to conduct a quick online history search on equipment or previous service work performed by their technicians

Design Storage | THE RELIABLE PARTNER

Headquarters

Fredericksburg, Virginia

Industry

Industrial Equipment

Financial System in Use

Microsoft Dynamics GP

Fieldpoint Users

14

Fieldpoint Applications

Work Order Management, Microsoft GP Integration, Contract Module, Preventative Maintenance Scheduling, Inventory Integration, Mobile App



A BETTER WAY TO MANAGE YOUR RESOURCES

When Design, Storage and Handling (DSH), an industrial storage and handling warehouse organization with 25 years of providing highly engineered material handling solutions, needed a better way to manage their technicians and billing through their service department, they turned to Fieldpoint's field service management software to better track service history on their equipment, and to do proper billing procedures for their technicians.

Prior to Fieldpoint, DSH used a manual work order system, so they had no way to conduct a quick online history search on equipment or previous service work performed by their technicians. Paper copies were kept for service reports and if they required any historical data, a physical copy would need to be retrieved, or DSH would look to an Excel spreadsheet that didn't offer any search functionality by serial number or technician to find the information needed.

Where their home legacy system lacked in functionality, Fieldpoint excelled, offering DSH the ability to have their service history at their fingertips, with quick search functionality through serial numbers, date ranges, work type and problem and solution notes, that minimized manual input by administrative staff. Fieldpoint's field service software also eliminated the redundancy of having a paper-based and Excel spreadsheet history, instead combining them into one, user-friendly and functional web-based portal.

"The key thing was to have history on the computer for a piece of equipment," said John Morfit, Technical Support Manager with DSH. "If someone called, or a technician needed to see the history on a piece of equipment, now at this point we have two to three years of history in Fieldpoint. Before we had to go to a file folder and pull out a paper copy. And if a customer wanted information, you can't send them 100 sheets of paper, so you would have to type into an Excel program and give them a brief overview of what was done. It was very time consuming and not very productive."



A FASTER BILLING PROCESS WITH FIELD SERVICE SOFTWARE

DSH sells contracts on rental equipment, such as forklifts and loaders, which are kept track of in Fieldpoint for automated monthly rental billing. Prior to Fieldpoint, DSH had to key in each rental unit manually to produce the bill, and with 20 to 25 pieces of equipment out on rent per month, it was taking a significant portion of time to produce the invoices to send to the customers.

Now with Fieldpoint, DSH can generate all their invoices from contracts each month automatically by clicking on the batch and have the invoices come out. It has drastically cut down on errors, as invoices are created in batches, as opposed to being created individually, and hand-entered at the beginning of the month.

"It speeds up our billing by quite a bit," said Morfit. "It easily saves us seven to 10 days on billing, which is a big deal. A lot of companies want to narrow down their cash flow and want to speed up billing and get paid for what they have done. It puts all of our resources right at your computer and it helps us in the office do our jobs better and it helps us organize data and information for us or for the customer in a better fashion."

OFFERING TECHNICIAN MOBILE ACCESS IN THE FIELD

They also are providing support in the form of preventative and emergency maintenance on their equipment, and work orders can be either created through service contract batches, or when a customer calls in to report a problem. And with work orders now being created inside the field service software, it has made it a more streamlined approach to providing both service and information to their customers.

Utilizing a mobile web browser to input work order information, DSH service technicians, who are scattered throughout the United States, can submit their work orders electronically, speeding up the time to billing. Prior to Fieldpoint, paper-based work orders were being sent by mail and would have to be manually entered into the computer for legacy information, as well as for invoices to be sent to the customers, affecting DSH billing procedures and delaying time to be paid for service completed.

"It just makes it easy to support the technicians," said Morfit. "It's easier to give your customers a quick overview of what has been done to their equipment. They can see their cost per hour if they need to see things like that. It just makes for a more seamless, easier path to provide information to people. It eliminates the redundancy of someone writing it down on a piece of paper and then having to put it into the system later on."



ANALYTICAL INTEGRATION WITH MICROSOFT GP

When evaluating field service software options, one that integrated with Microsoft Dynamics GP was of importance to DSH, as they used Microsoft GP as their accounting software. With the built-in integration, customer profiles, inventory and employee information was transferrable between the two programs.

They also made use of Microsoft's Analytical Accounting module, which would need to be fed dimension codes through Fieldpoint, and into the module. Every time an invoice detail line is sent to Microsoft GP, DSH wanted to see who the sales person was, who the technician was, or whichever employee inputted the line for better tracking and recording of data.

Through the integration, the mapping is completed that sends those employee codes from Fieldpoint, to Microsoft GP, populating the Analytical Accounting module with more readily available and accurate data.

MAKING THE RIGHT SELECTION

DSH looked at a few different software solutions before deciding that Fieldpoint was the right selection for them, offering them not only the functionality they needed from a field service software, but also the support from their Fieldpoint consultant to help install and customize the software to fit their needs.

"One of the best selling points is the ongoing support and consultant expertise that we had while getting the system set up," said Morfit. "Our implementation consultant did an excellent job of helping us get everything up and running."

As DSH continues to use Fieldpoint, their history of service continues to grow inside the field service software, giving Morfit and his service staff the information they need at their fingertips, while providing greater support to their customers and their technicians.



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