

Service Dispatch

Sold, implemented, and supported by

Synergy

BUSINESS SOLUTIONS

800-481-8590 ■ www.synergybusiness.com

Gold Microsoft Partner

Benefits

- **Simplify service and dispatch processes**
Automate your service call processing, dispatching, sales closure, and cost-related activities efficiently and accurately. Service Dispatch helps streamline business processes, reduce paperwork, eliminate duplicate data entry, and provide critical client historical information.
- **Improve customer satisfaction**
Service Dispatch gives you all the critical client contract and historical information you need to operate your business more profitably. Focus more time on helping customers rather than managing multiple systems, so that your customers can now rely not only on your service skills but also on your ability to manage their information.
- **Streamline data entry**
Enter new customer information quickly, perform look-ups, and retrieve customer information more easily than ever before. From a single screen, you can enter existing or new customer information, service call details, and other information such as preferred technicians and credit card numbers.
- **Work proactively**
Receive proactive message alerts to notify you of delinquent accounts and easily view account information to remind your customer of an overdue invoice. Other user-defined messages can alert you to required purchase orders, any active service contracts, and whether another service call has been assigned to the site.
- **Enhance service dispatch**
Schedule service calls easily and electronically, in the same system as your contract and invoicing information. Manage service calls down to the problem code level, view preventive maintenance and emergency service calls in the same screen, and adjust schedules with simple drag-and-drop functionality. View detail or summary information with a simple shift between single-day and week-at-a-glance views.

Microsoft Dynamics™ SL

Track and manage every detail of your service organization with Microsoft Dynamics SL Service Dispatch. Flexible capabilities help you manage field technicians efficiently, clarify information about technicians' profitability, and accurately track customer information, including account status and equipment and service history.

Reschedule

or reassign service calls to a different technician with simple drag-and-drop functionality.

Service Call ID	Customer ID	Site ID	Promise Date	From Time	To Time	Terms ID	PM	Call Type	Priority	C.
SEA0000013	C010	DEFAULT	5/1/2004	08:00 AM	10:00 PM	30 - Net 30	P	PLUM	Premium	TTAL
SEA0000014	C020	DEFAULT	5/1/2004	08:00 AM	10:00 PM	30 - Net 30	P	HEAT	Premium	TTAL

Shift

between single-day and weekly views.

FEATURES

BENEFITS

Microsoft MapPoint integration	Map service call addresses more quickly and accurately — and plan technicians' routes accordingly — with integration between Microsoft MapPoint® and field service for Microsoft Dynamics SL.
Flexible Invoicing	<ul style="list-style-type: none">• Process invoices for flat rate or time and materials. Labor hours can be entered and sent into Microsoft Dynamics SL Payroll, eliminating redundant entry.• Enter parts used versus parts purchased, work hours versus billable hours, billable versus non-billable transactions, and more — on a single transaction.• Create an invoice while keeping a service call open by using progress billing capabilities. You can also bill third parties and retain site-specific history of all services performed.
Integrated Pager Communication	Enable technicians to communicate with headquarters, receive work assignments, complete work orders, and more with integrated two-way pager capabilities.
Time/Money Savings	Empower field technicians to send invoice information electronically, including time and materials, to the Microsoft Dynamics SL accounting system, thus improving cash flow and cutting billing time from weeks to days or even hours.
Easy Lookup	Locate an existing customer by searching by name, address, phone number, zip code, customer ID, or equipment serial number.
Faster Data Entry	Save time with the extensive use of default values for fields, including the current date/time, call types, status, and technicians. Default information can be overridden anytime by a user with the proper access rights.
Multiple Location Management	Keep accurate, site-specific service information for every customer, including multiple addresses, contact, phone number, and detailed notes.
Advanced Search Criteria	Search sites rapidly during work order entry to process incoming service requests using advanced criteria such as name, address, phone number, equipment ID, and serial number.
Service Call Substantiation	Manage incoming calls better by alerting customer service representatives (CSRs) of credit issues, unauthorized tenant call requests, and existing open service calls, and by prompting CSR notes when entering fault codes.
Dispatcher Flexibility	Sort/select service calls by branch, technician, geographic zone, call type, and status- such as unassigned calls, in-progress calls, and completed calls.

For more information about Microsoft Dynamics™ SL, visit: www.synergybusiness.com or call 800.481.8590

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