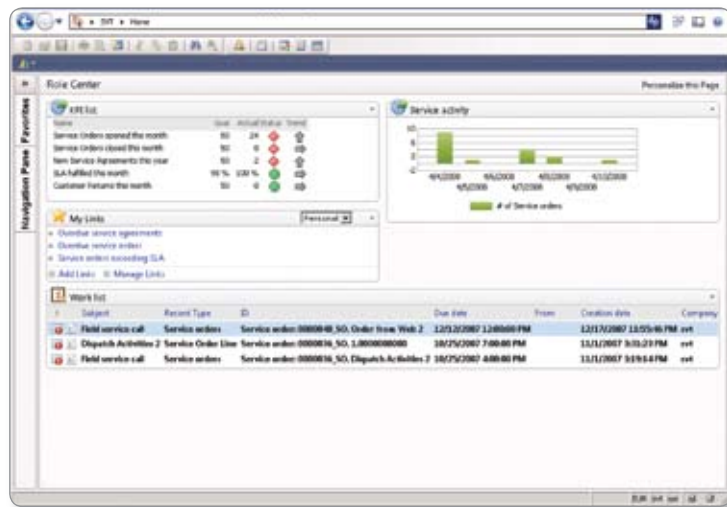# Service Management

Service Management in Microsoft Dynamics AX 2009

BENEFITS

- **Meet evolving customer demands.** Streamline the process of creating and maintaining service agreements so you can manage and respond quickly to a wide range of customized and ever-changing service requirements.

- **Manage financials effectively.** Streamline A/P and A/R management; track exact costs for service orders; monitor and manage invoicing; and handle multiple revenue models based on resource consumption or periodic payments.

- **Gain insight into operational processes.** Save time and reduce errors with integrated processes that minimize data reentry and help ensure the availability of accurate, real-time information across your business. Empower customers with access to self-service applications.

- **Maximize the quality of services.** Optimize resource use with automated planning for service orders; run customer feedback reports; analyze profit and loss figures; and track operational productivity to understand performance and achieve profitably.

Empower customer service representatives, field technicians, and managers to maximize efficiencies, understand costs and revenues, and enhance profitability. With Service Management in Microsoft Dynamics™ AX 2009, you can streamline planning, tracking, and decision-making for a wide range of service operations.

Your service professionals can easily create agreements tailored to global customer requirements, automatically generate service orders, and help ensure timely compliance with commitments. They can gain deep insight into service orders, financial and contract details, and repair histories to facilitate efficient service planning, maximize technician skills, and quickly respond to customer queries.

Role Center for the Customer Service Manager

Help ensure that service orders and projects stay on track with Role Centers that present relevant tasks and information in a personalized view to help employees work smarter and faster. Service managers can find, visualize, and track key data using RoleTailored reports, alerts, and customized performance scorecards.

Using Role Centers, service managers and supervisors can gain a comprehensive view of their organization, easily track open service requests, and receive automatic alerts for customer issues. With a complete view of operations—including technician utilization data and customer status—service managers can speed decision-making to improve business success and increase profitability.

Microsoft Dynamics™ AX

FEATURES

ADVANCED MANAGEMENT ENTERPRISE	**Service agreements**	• Working with flexible templates, quickly create detailed, multilevel agreements, and define tasks and frequency for service calls. • Tailor agreements to a wide range of customer requirements, service prices, and payment arrangements.
	Objects	• Register objects or equipment to be serviced and quickly link object forms to service agreements. • Easily maintain and access detailed object records over the lifetime of an agreement.
	BOM templates	• Help ensure accurate tracking for parts replacement with bill of material (BOM) templates for object subcomponents.
	Service orders	• Create manual service orders or set them up for automatic generation at intervals specified in a service agreement to help ensure compliance with commitments. • Define individual service calls against service orders. • Rapidly create service orders over the Internet with Enterprise Portal in Microsoft Dynamics AX.
	Repair management	• Register the object to be serviced and the problems reported for each repair task, and assign a diagnosis code. • Register incoming complaints, track repair progress, and record final resolutions. • Evaluate repair histories to identify faulty products or problem resolution issues, and analyze service trends to predict customer needs.
	Integration with Project Accounting in Microsoft Dynamics AX	• Accurately track service costs and revenues, manage invoicing, and handle multiple revenue models. • Analyze revenues and customer requirements to assess service needs and determine service-specific and overall profit or loss. • Link service agreements to specific projects.
	Integration with the 2007 Microsoft Office system	• Create service tasks and appointments that synchronize with Microsoft® Office Outlook®. • Share and manage reporting data using Microsoft Office Excel® and Microsoft Office SharePoint® Server 2007.
	Service subscriptions	• Create, process, post, and invoice service subscription transactions over time for fixed-price service agreements. • Accommodate revenue based on fixed or irregular periods and multiple pricing arrangements; adjust for reduction days and price increases; and set pricing using price indexes. • Service subscriptions can be run independently or as a part of Service Management.

Features are organized by Business Ready Licensing edition. Actual editions may vary at the time of licensing.

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

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