



## Dynamics 365 Integration

Combine our field service management software with Microsoft Dynamics ERPs to form a powerful field service team



Data Mapping



Work Order & Sales Order Relationship



Purchase Orders

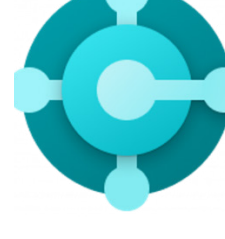


Real-time Inventory



Customer Invoicing

Fieldpoint offers a seamless, out-of-the-box integration for a true end-to-end field service experience for growing businesses



Microsoft Dynamics 365 Business Central

The Fieldpoint Integration speeds up our billing by quite a bit. It easily saves us 7 to 10 days on billing, which is a big deal. (...) It puts all of our resources right at our computer and helps the office team do our jobs better, organize data and information for ourselves and our customers.

**John Morfit**  
Technical Support Manager  
Design, Storage and Handling



## Exceptional service with an integrated field service software and ERP system

### Data integration with mapped transfer lines

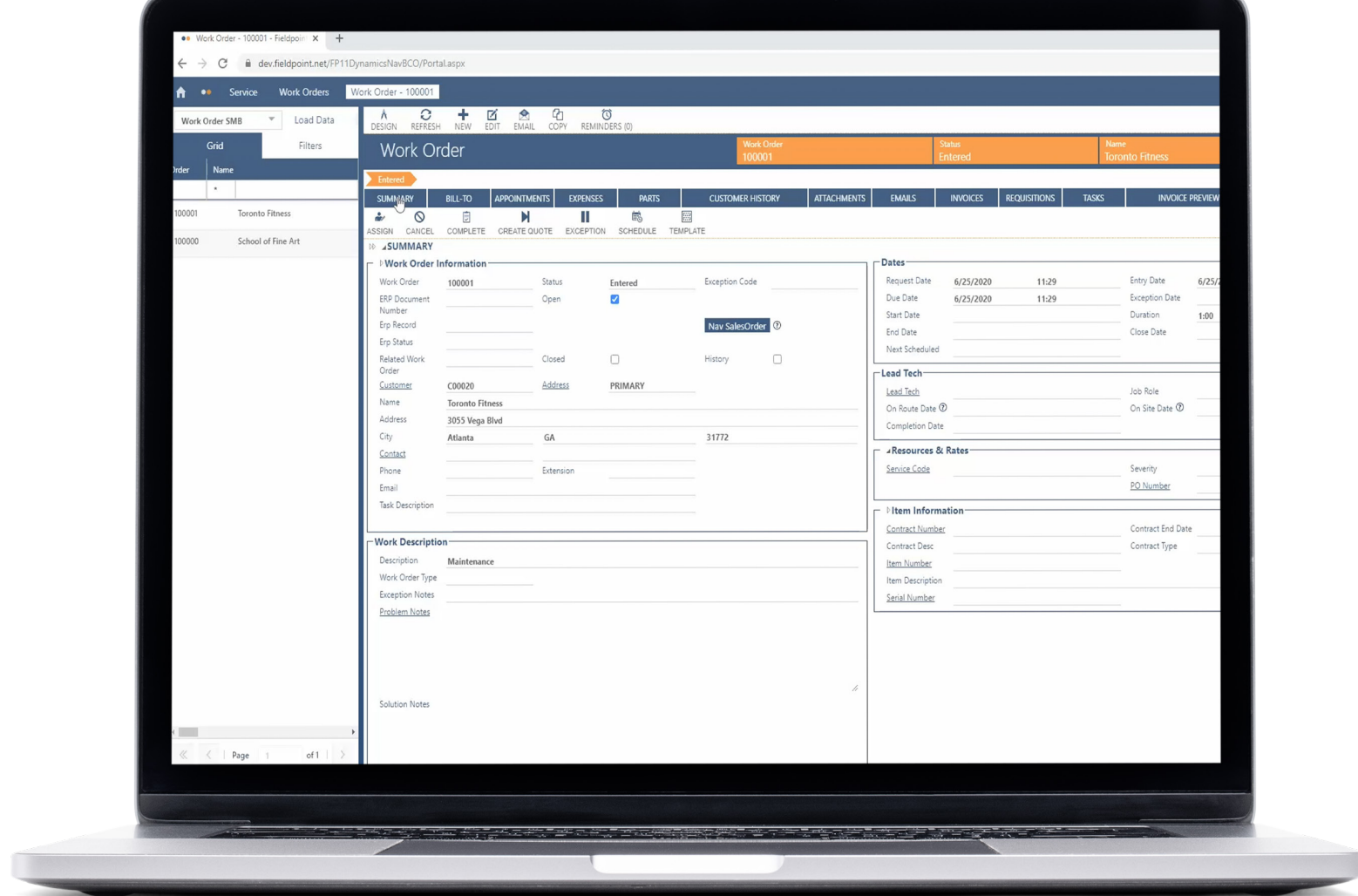
From the Microsoft Dynamics 365 product, the Fieldpoint system can be populated with the information needed to start managing service. Manual errors are reduced when inputting data, as both systems reflect any changes made in either solution. The Fieldpoint system is initialized quickly and loads critical information from the ERP first, including:

- Customer profiles
- Vendor information
- Product lines
- Stock locations
- Employee profiles



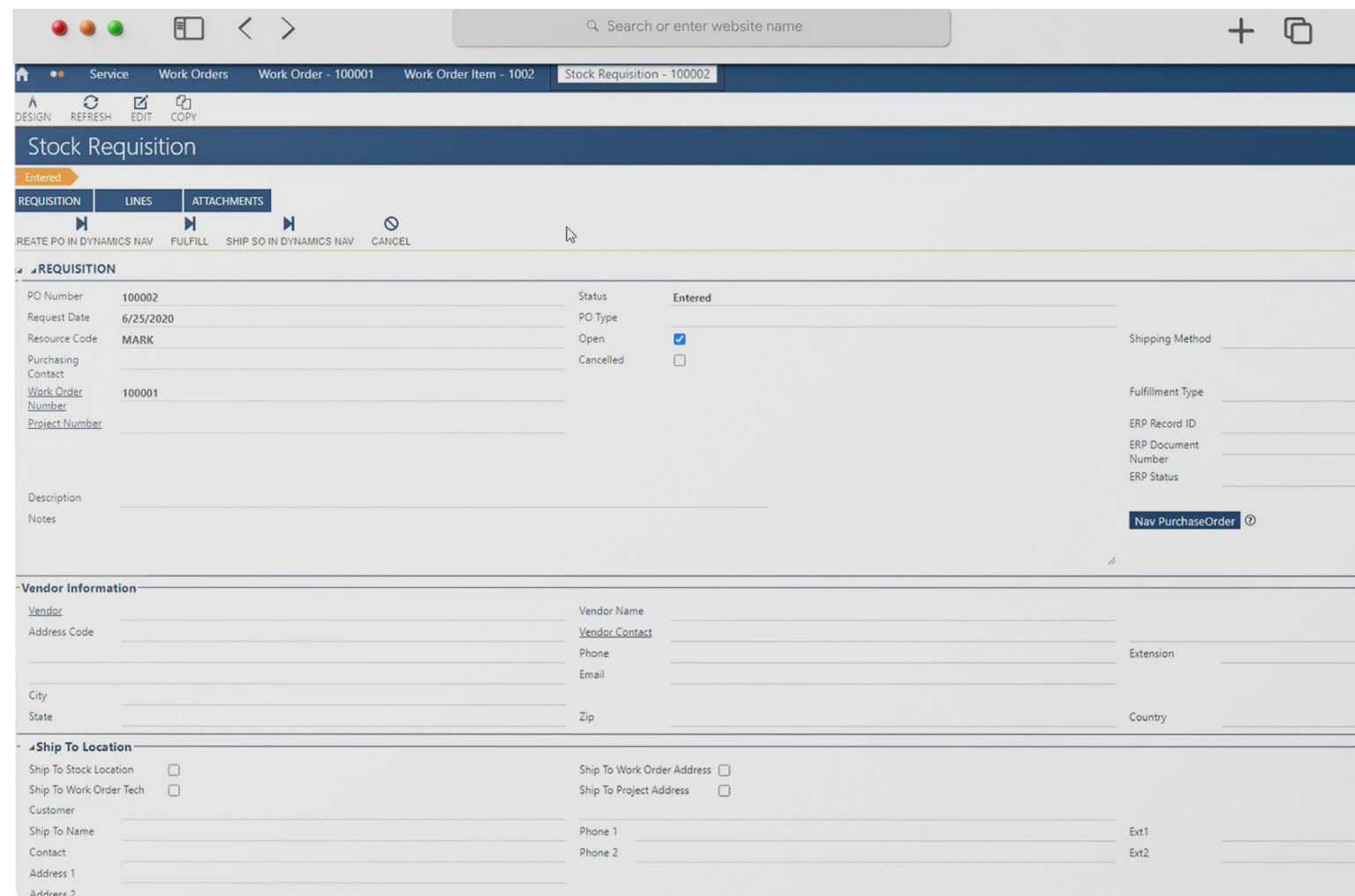
### Work order and sales order relationship

A work order produced in Fieldpoint will automatically create a sales order in Microsoft Dynamics 365. Parts added will go directly onto the sales order, and finalized service time and expenses will be added when the work order is invoiced and exported to Microsoft Dynamics 365. This eliminates any inaccuracies in generating an invoice, as information from the work order is directly placed on the sales order for it to be billed.



### Real-time inventory and purchasing

Parts information is available in real-time on the work order. Parts not in stock can be requisitioned through Fieldpoint by seamlessly creating purchase orders in Microsoft Dynamics 365. The information will directly be applied to the sales order for accurate billing. This part of the integration allows field service members to remain inside their own software to access parts without having to enter the ERP system.

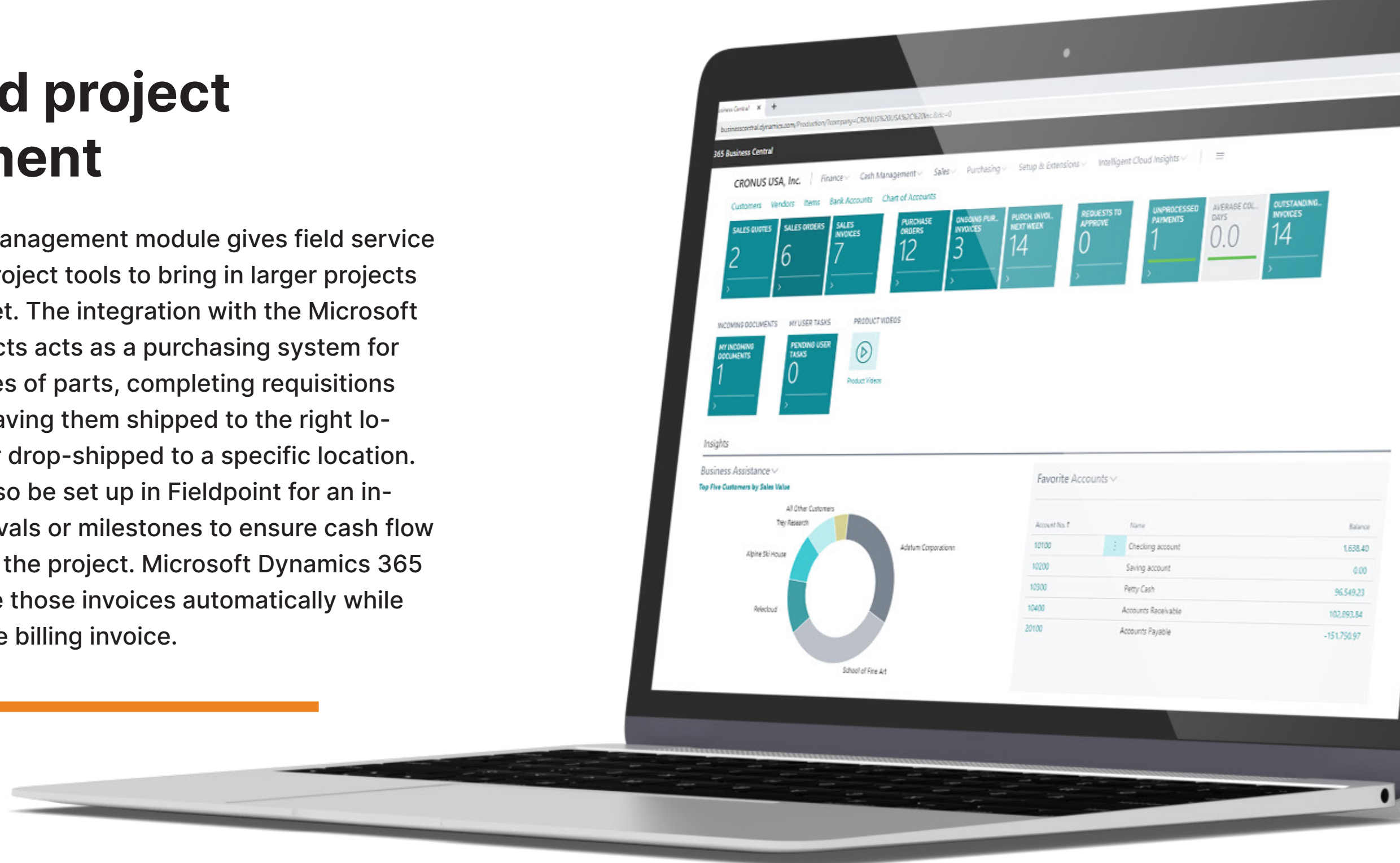


### Immediate customer invoicing

When a work order is invoiced in Fieldpoint and exported to Microsoft Dynamics 365, the sales order is removed and turned into a posted sales invoice with parts, labor hours, and expenses included. Members of the field service team can post a batch of work orders or a single work order in Fieldpoint and generate invoices immediately to send to customers without needing to access the ERP system or wait for accounting to complete the invoicing process.

### Integrated project management

Fieldpoint's project management module gives field service teams a breadth of project tools to bring in larger projects on time and on budget. The integration with the Microsoft Dynamics 365 products acts as a purchasing system for ordering large volumes of parts, completing requisitions of those parts, and having them shipped to the right location, warehouse, or drop-shipped to a specific location. Billing triggers can also be set up in Fieldpoint for an invoice at varying intervals or milestones to ensure cash flow throughout the life of the project. Microsoft Dynamics 365 ERP systems produce those invoices automatically while Fieldpoint triggers the billing invoice.



"What we see with our clients is that their requirements outgrow, fairly quickly, what's available in the base Business Central product for project costing and service. That's why we partner with Fieldpoint to offer our clients a more sophisticated solution. Customizing Business Central is typically not efficient or cost-effective to ensure long-term success."

- Microsoft Gold Partner in Minnesota area

Let's Connect

