

Integrating Dynamics CRM with FieldOne Solution to Deliver Accurate Field Reporting

Objective

Our customer was using FieldOne Service Management Solution for all its field agents. They were also using Microsoft Dynamics CRM to track the customer & lead activities. They wanted to integrate both Dynamics CRM and FieldOne Service solution to improve their efficiency. The customer was facing data redundancy issue as there was no support provided from the FieldOne Sky solution. Massive data was required to be migrated and cleaned to FieldOne Service Solution with different entity and field structures. Microsoft presented a migration tool but was not so useful, and we needed to develop a custom console tool to migrate all the entity data.

Challenges

- › Manage and streamline field agent activities
- › Automate and improve scheduling to dispatch the right technician and get the most value out of resources
- › Empower technicians with a 360-degree view of customers and get real-time guidance to improve resolution time and earn customer trust
- › FieldOne Sky to Field Service Data Migration
- › Monitor field agents; those that go off-site to install, fix, inspect, deliver – anything on the road and out of the office

Approach

Our team analyzed the customer's current challenge and developed a console data migration solution wherein the data of both Dynamics CRM & FieldOne Sky was cleaned, and accurate data was presented to the team. Rishabh Software adopted a phased implementation approach with a logical sequence of phases to accomplish the planned tasks into three incremental releases.

We planned the execution of the project in the following order and respective deliverables:

1. Upgrade to 9.0 version (Dynamics 365)
2. Field One Sky to Field Service migration
3. Migration of Data

The solution helped to automate and manage tasks that are commonly required of a field agent, enabling the customer take advantage of all the robust features within Dynamics CRM including the powerful reporting – as well as the field service-specific abilities.

A team of 4 members, including the project manager, was working to execute the data integration project.

Business Benefits

- › Increased efficiency across the business
- › Improved customer service through efficient service delivery
- › Improved the work-life of staff through route calculations, directions, and more efficient schedules
- › Maximizes resources through automation
- › Increased profitability thanks to the increased customer service, efficiency, and productivity

Industry Segment

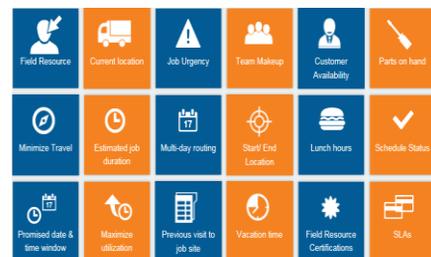
Oil & Gas

Customer Profile

US-based enterprise, having 20+ years of experience in the Oil and Gas industry

Technology and Tools

- › Microsoft Dynamics 365
- › Field One Sky to Field Service Migration Tool
- › Microsoft .NET
- › Microsoft C#
- › Microsoft Visual Studio 2017



About Rishabh Software

Rishabh Software is a CMMI 3, ISO 9001, ISO 27001, Microsoft Gold Partner & Oracle Gold Partner providing application development services & solutions to mid-sized enterprises globally through our offices in the US, UK and India. We leverage the latest technology stacks in Cloud, Mobile, Business Intelligence and other Enterprise technologies helping clients to get the best value of their IT budget. With our team of 250+ application developers, we have implemented 1000+ successful projects across 24 countries. We work on .NET, Java, PHP, iOS, Android, Oracle, IBM and Open Source technologies.



www.rishabhsoft.com

sales@rishabhsoft.com

US: +1 877 747 4224

UK: +44 207 993 8162