

 **ANNATA 365**  
FOR FIELD SERVICE

Shaping The Future  
of **Field Service**  
**Management**



Microsoft  
Partner

2019 Partner of the Year Winner  
Automotive Award

2019/2020 INNERCIRCLE  
for Microsoft Dynamics

 annata



# Key offerings

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- **Customer Engagement**
- **Plan Work**
- **Inform & Enable Mechanics**
- **Debrief Work Orders**
- **Perform analysis and Integration**
- **Follow up process**



# ANNATA 365 FOR FIELD SERVICE



## OPERATIONS

Annata's solution equips mechanics and operators with 360 degree information to the detect issues in real-time, troubleshoot issues remotely and resolve problems while keeping customers informed during every interaction of the service.

## MECHANICS



## CUSTOMERS



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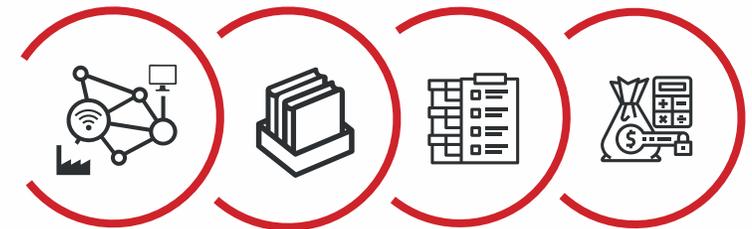
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# Customer Engagement

- **Service campaigns**
- **Work order** management
- **Inventory** management
- **Device** management
- **IoT dashboards** and connectors
- Expense and travel **cost** management
- **Scheduled Services**
- Repair and operations (MRO) **product life cycle** management





# Plan Work

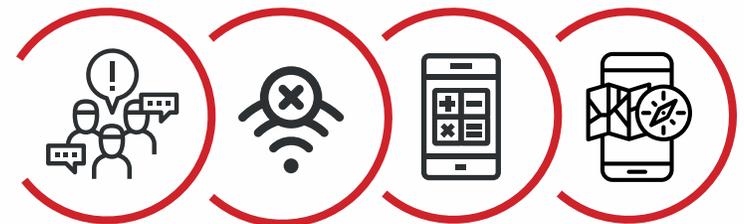
- **Scheduling** assistance with optimization on skills, Certification and location
- **360°** view on customer and device
- Time off **requests**
- Parts **planning** and purchasing
- **Customer** approval coordination
- Preferred mechanic





# Inform & Enable Mechanics

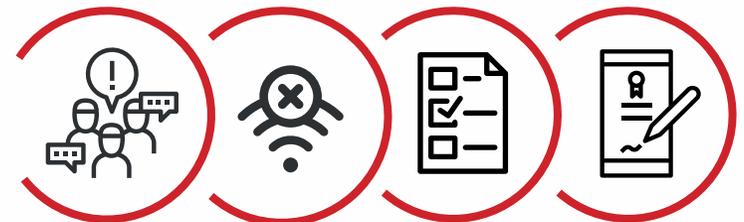
- 360° view on customer and device
- Mobile enabled apps with **offline** capabilities
- **Routing of GPS** tracking
- Work order **history for devices and customers**
- Customer **engagement**
- **Digital** service support for mechanics (and customers)





# Debrief Work Orders

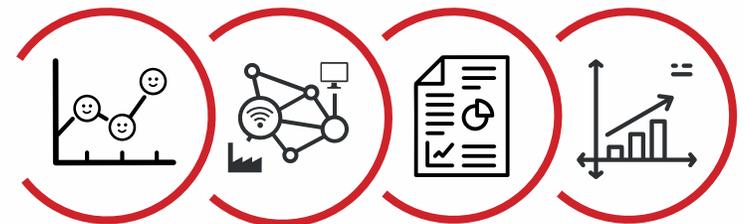
- Online and offline **mobile** collection of timesheets
- **Parts** used
- **Tasks** completed
- Inspection
- **Device record** updates
- Information updates for warranty claims
- Digital signature
- Customer **satisfaction** surveys





# Perform analysis and Integration

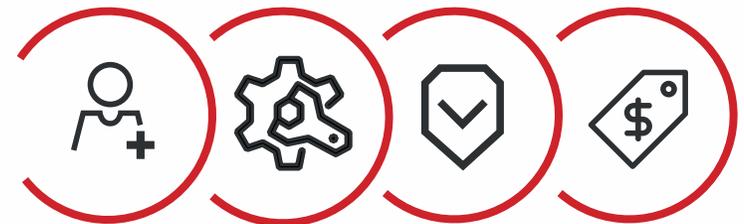
- **Performance** management reports
- Interactive **dashboards** and predictive **analytics**.
- Connectors to Power BI.





# Manage additional operations

- **Customer satisfaction survey**
- Warranty and claims management
- Invoicing





# Power BI For Field Service Operations

Create and customize compelling reports on an extensible, scalable and secure architecture.

Power BI LukaszP Demos > ArcGIS Maps for Power BI MBI

Ask a question about your data

Exposure by location

Exposure by city

Orlando	Lake Worth	Apopka							
	Gainesville	Tallahas...	Leca...	Cr...	Cl...				
Jacksonville	Delray Be...	Palm C...	Holly...						
	Lehigh Ac...	Kissim...	Dun...						
Miami	Clearwater	Davie	Dayt...						
Tampa	Cape Coral	Boca Ra...	Cuttic...						

Exposure percentage

49.3%

Single Line Address, Policy Value

Policies

Policy Type	First Name	Last Name	Single Line Add...	Policy Value
Car	ABEL	RUIZ	Florida's Topke...	\$216,203.39
Home	ABIGAIL	MEDINA	1901 Ocean Po...	\$20,470.90
Car	ADAM	KNIGHT	17735 Fieldro...	\$151,140.70
Car	ADAM	RIOS	8301 NW 52nd ...	\$153,967.21
Car	ADDYSON	RICHARDS	4901 Old Blue ...	\$21,739.56
Car	ADELAIDE	TERRY	575 SE 62nd Av...	\$108,080.62
Car	ADELINE	KING	341 NE 30th Te...	\$40,511.51
Home	ADELINE	WADE	3756 NW 28th ...	\$106,424.29
Home	AIDAN	TATE	15160 SR-7, Del...	\$174,528.47
Car	ALICE	COLLINS	1060 NW 79th ...	\$77,079.46
Car	AMELIA	JOHNSON	163 Rivina Dr, J...	\$12,980.96
Home	ANA	BANKS	, Perry, Florida ...	\$124,077.55
Home	ANASTASIA	MENDEZ	Mississippi Ave...	\$196,006.97
Car	ANDREW	ROSE	8539 N Linwoo...	\$38,258.78
Car	ARLO	WATKINS	2439 E Verde Ct...	\$72,770.82
Total				\$23,186,797.53

Selected Exposure

\$23,186,798

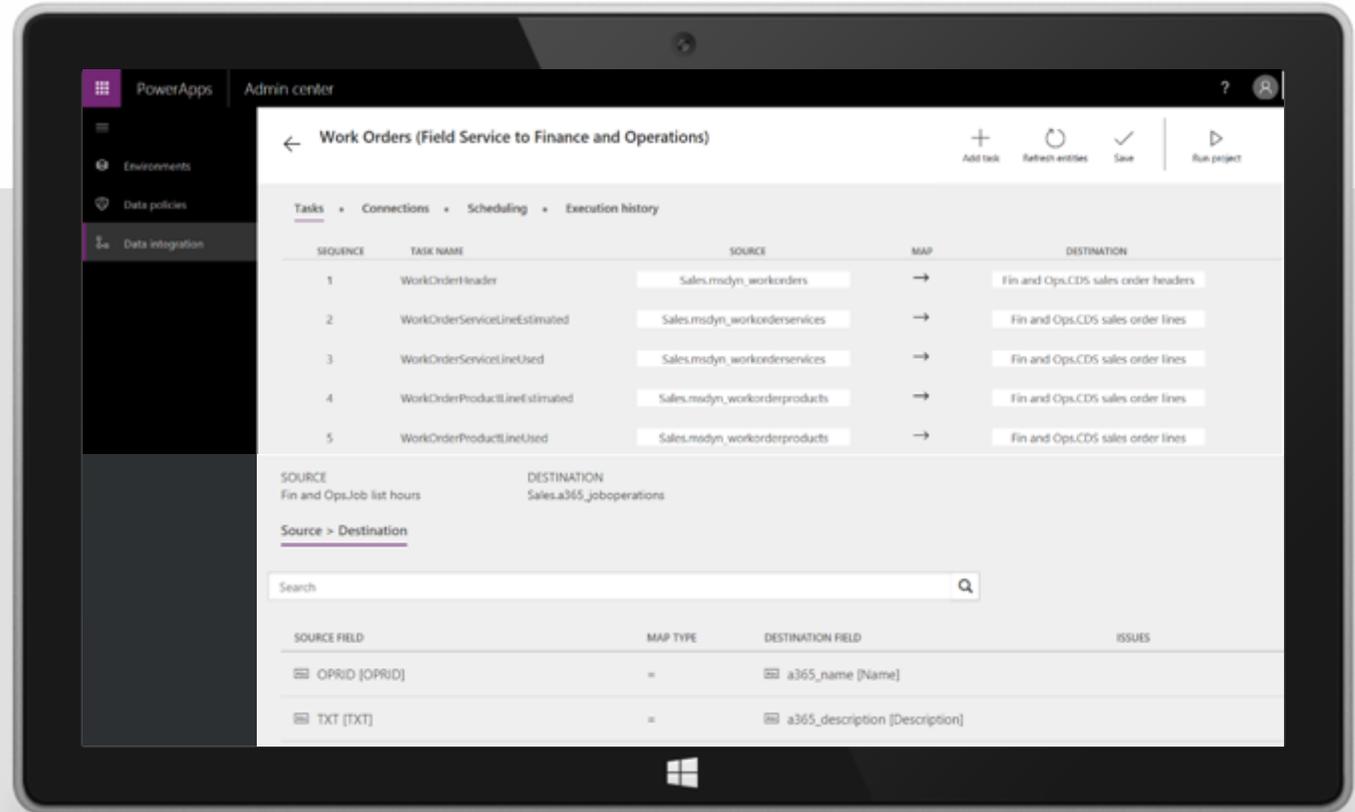
Total Exposure

\$47,005,115

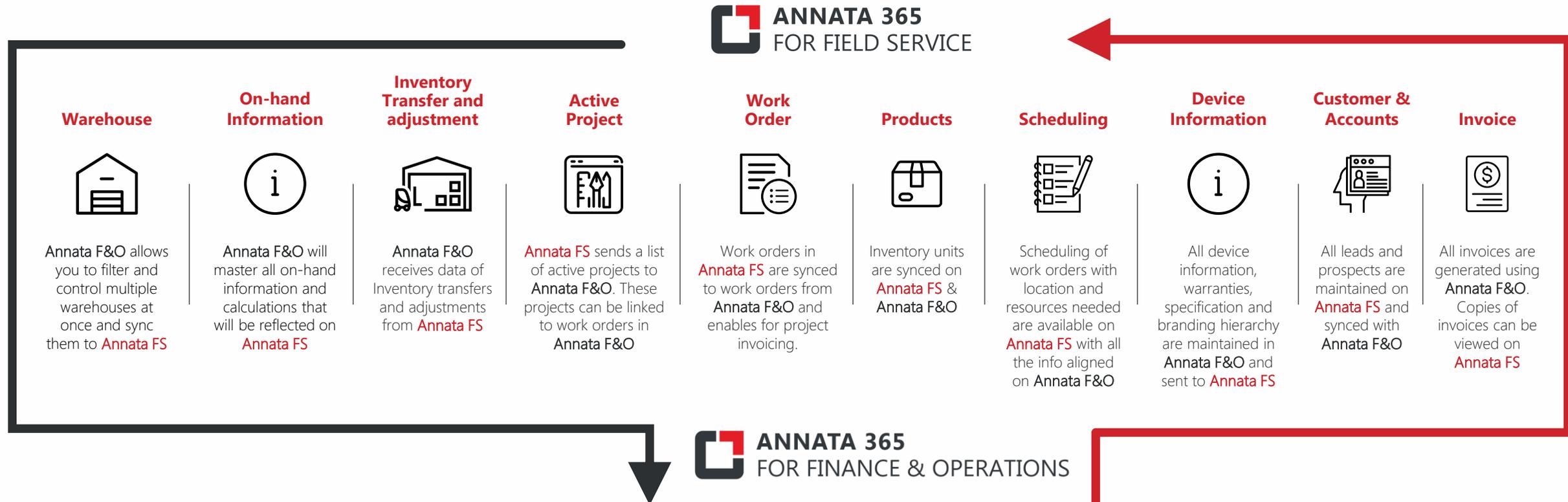


# Connectors to Annata 365 For Finance & Operations

Data stored in Annata 365 For **Field Service app (Annata FS)** seamlessly integrates with data in Annata 365 For **Finance & Operations (Annata F&O)**



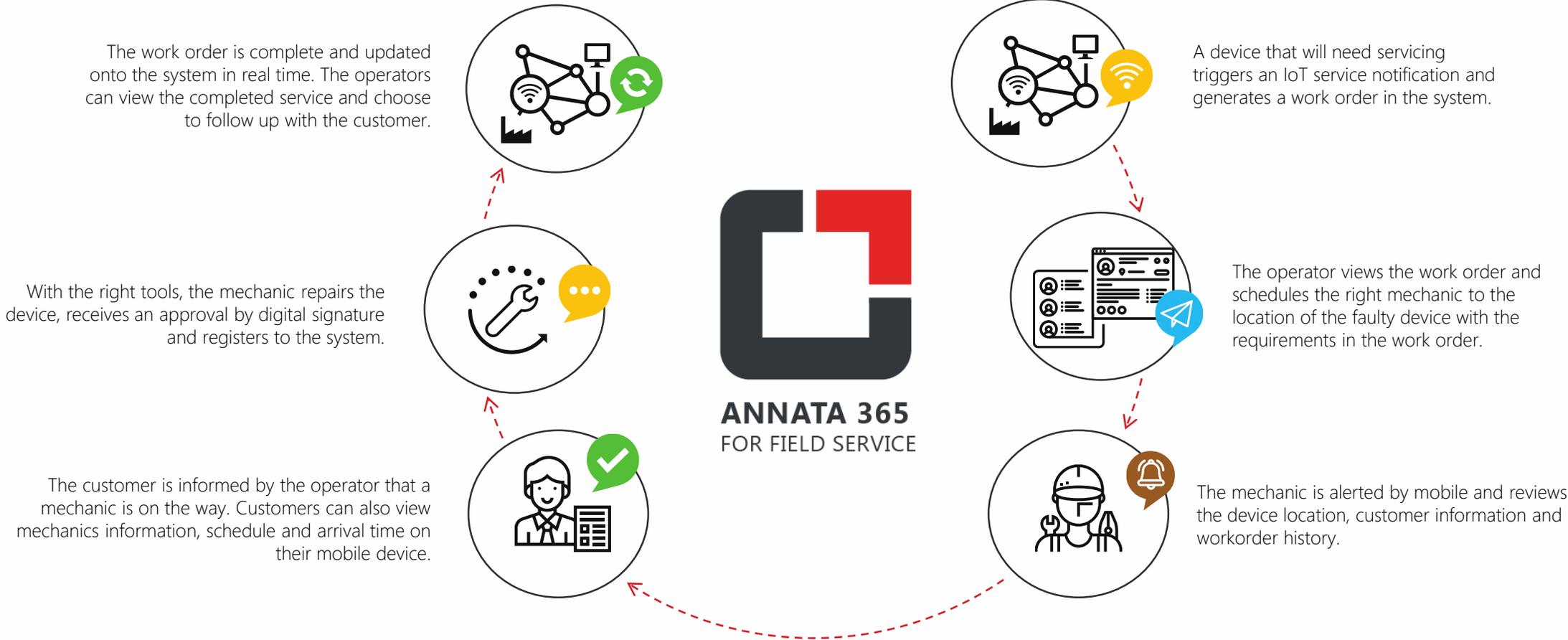
# Integrating Field Service with Finance & Operations



These **data integrators** above allows you to have the visibility of all your business processes in one place.



# Proactive Maintenance with IoT



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# Contact Annata

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