

Microsoft Power Platform Offerings

Field Service Visit

Microsoft
Partner



Gold Data Analytics
Gold Collaboration and Content
Gold Cloud Productivity
Silver Datacenter
Silver Small and Midmarket Cloud Solutions



Field Visit Series Apps on Power Platform

Power BI, Power Apps and Power Automate

Application Available:

- **Field Services Management - Services & Maintenance**
 - ✓ **Use Cases:** Installation & Servicing, Manufacturing, Petro and Oil & Gas, Medical Equipment Servicing, Electronic Retailer (e.g. eXtra, Jarir etc.)
- **Field Sales Audit and Sales Data Capturing**
 - ✓ **Use Cases:** Field merchandising, Store Audits and compliance, Marketing Intelligence Research.
- **Fields Audit Visit & Inspection.**
 - ✓ **Use Cases:** conducting any kind of field audits.

Service Visit – App for Field Services Management

Enabling field service workers to accept all service request raised and provide services.

Use Cases

Installation & Servicing, Manufacturing, Petro and Oil & Gas, Medical Equipment Servicing.

- ❖ Raise Service Request.
- ❖ Assign Service Request to concerned field agent.
- ❖ Relevant data to field agent – service location, contact details etc.
- ❖ **Review and Analysis:** note down in detail about the problem, issues, take picture (machine, parts, service photo etc.).
- ❖ **Sign Off:** Take Signature for closing of service request or making further visit.
- ❖ **Order Parts:** Flexibility to create product or parts replacement request – can be integrated with back backend system for final processing.
- ❖ **Electronic Stamping:** Time Stamping and Auto Geotagging of all the request for audits on visit at any later point of time.
- ❖ **Integration:**
 - ✓ REST API based third party.
 - ✓ ERP (Dynamics, SAP) – Pickup Equipment from and place part replacements.



❖ Benefits

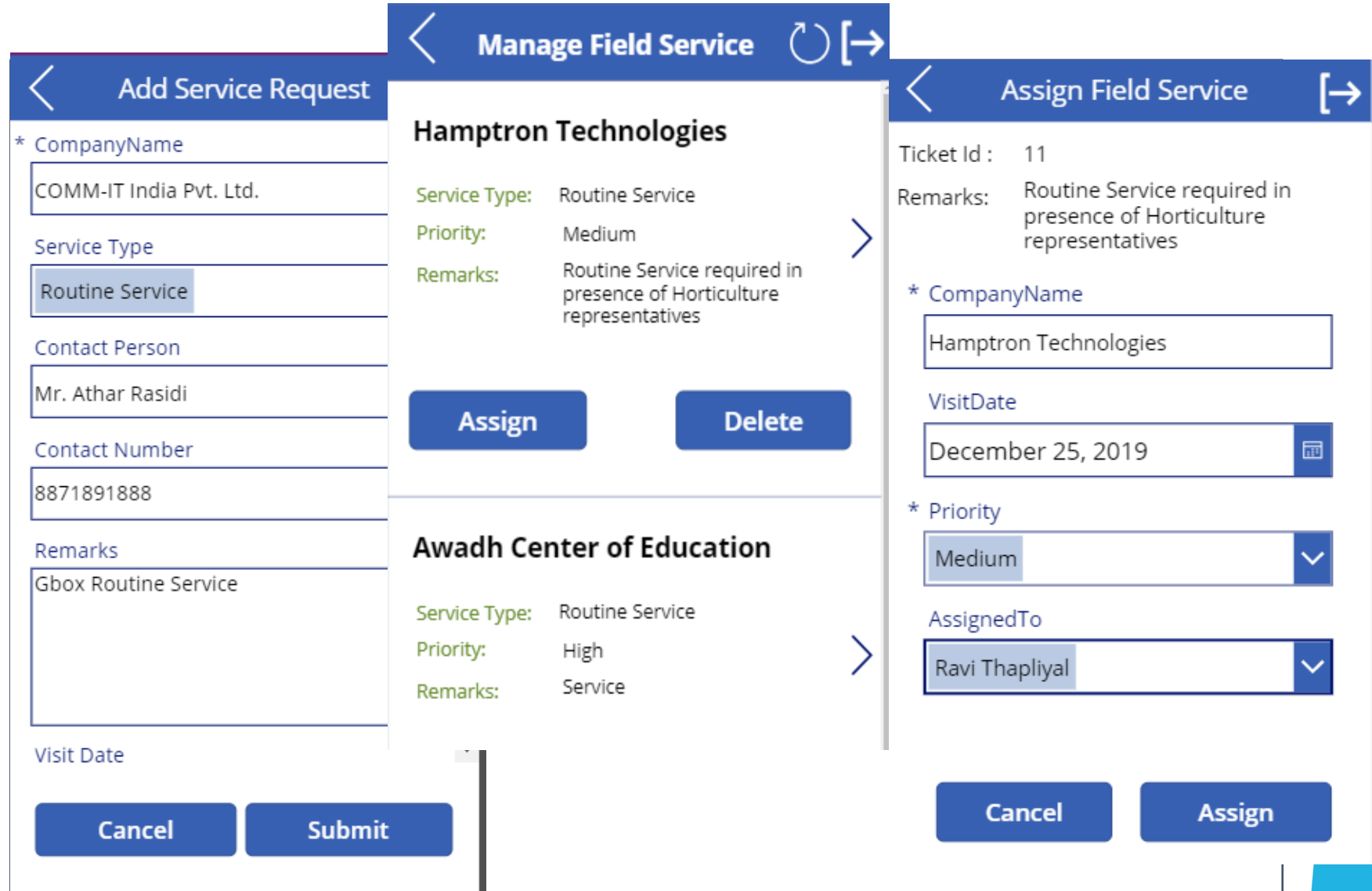
- Easy to use UI:
 - ✓ Site Owner
 - ✓ Service Helpdesk
 - ✓ Field Engineer.
- Real time Status updates
- Eliminate Paperwork.
- Set Priority.
- Ability to Request Product/Parts.

Service Visit – App for Field Services Management

Helpdesk Resource can add a service request, manage & assign service request to the Engineer.

[Field Service Request & Manage]

- ❖ Ability to raise Field Service request
- ❖ Ability to assign Field Service request to Field Engineer



The screenshot displays three overlapping mobile application screens for field service management.

Left Panel: Add Service Request

- Company Name:** * COMM-IT India Pvt. Ltd.
- Service Type:** Routine Service
- Contact Person:** Mr. Athar Rasidi
- Contact Number:** 8871891888
- Remarks:** Gbox Routine Service
- Visit Date:** (empty field)
- Buttons:** Cancel, Submit

Middle Panel: Manage Field Service

- Company Name:** Hamptron Technologies
- Service Type:** Routine Service
- Priority:** Medium
- Remarks:** Routine Service required in presence of Horticulture representatives
- Buttons:** Assign, Delete
- Company Name:** Awadh Center of Education
- Service Type:** Routine Service
- Priority:** High
- Remarks:** Service

Right Panel: Assign Field Service

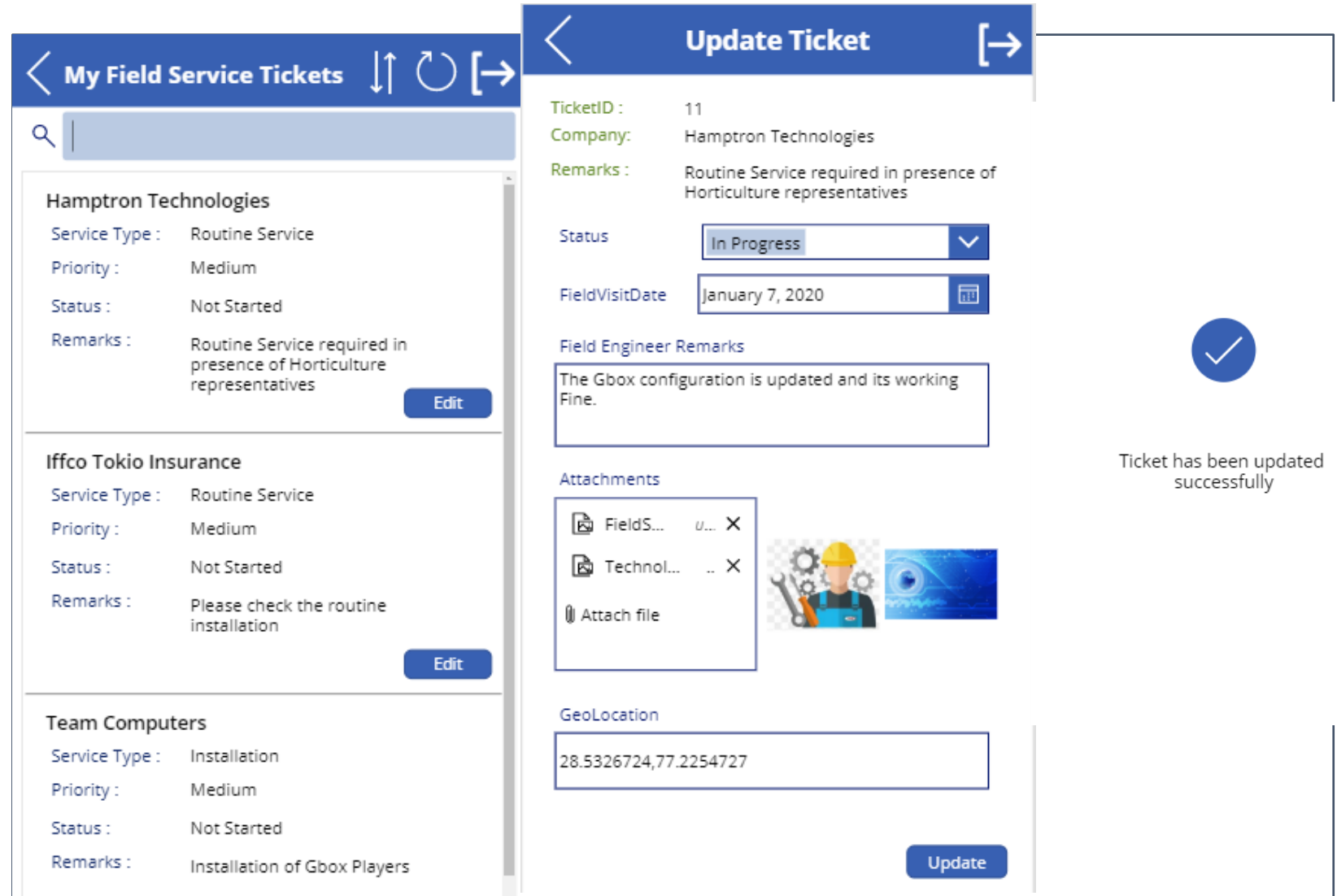
- Ticket Id:** 11
- Remarks:** Routine Service required in presence of Horticulture representatives
- Company Name:** Hamptron Technologies
- Visit Date:** December 25, 2019
- Priority:** * Medium
- Assigned To:** Ravi Thapliyal
- Buttons:** Cancel, Assign

Service Visit – App for Field Services Management

Capturing Field Details & updating the ticket.

[Updating Field Service Request]

- ❖ Searching, Sorting, Refreshing the tickets assigned
- ❖ Capturing Installation Pics & Geo-Location
- ❖ Updating the status of Field Service ticket - Completed



My Field Service Tickets

Hampton Technologies

Service Type : Routine Service
Priority : Medium
Status : Not Started
Remarks : Routine Service required in presence of Horticulture representatives

Iffco Tokio Insurance

Service Type : Routine Service
Priority : Medium
Status : Not Started
Remarks : Please check the routine installation

Team Computers

Service Type : Installation
Priority : Medium
Status : Not Started
Remarks : Installation of Gbox Players

Update Ticket

TicketID : 11
Company: Hampton Technologies
Remarks : Routine Service required in presence of Horticulture representatives

Status :

FieldVisitDate :

Field Engineer Remarks

The Gbox configuration is updated and its working Fine.

Attachments

FieldS... u... X
Technol... .. X

Attach file

GeoLocation

28.5326724,77.2254727

Update

✓

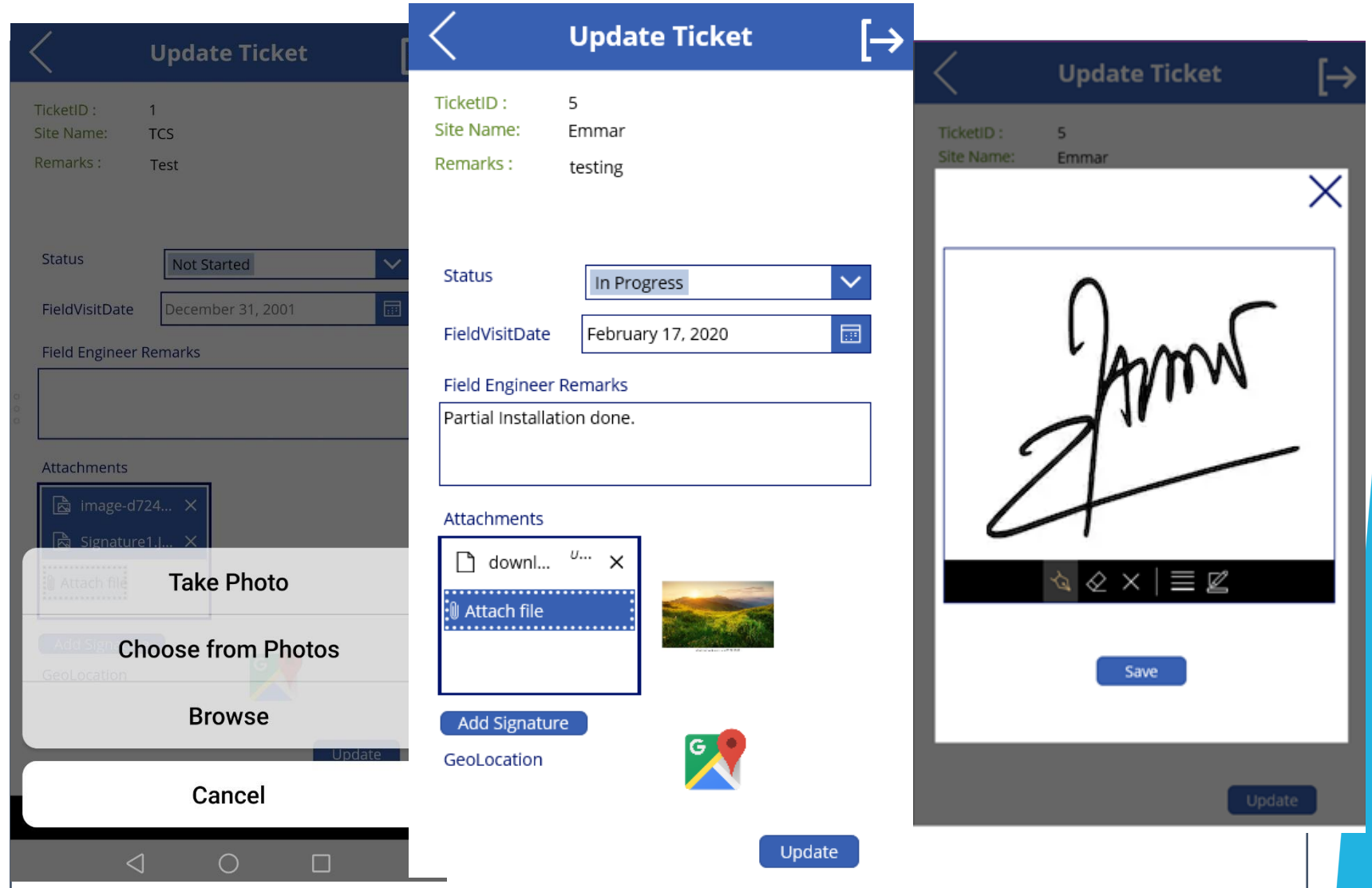
Ticket has been updated successfully

Service Visit – App for Field Services Management

Browse or Select Site Photos & Capture Signature

[Updating Field Service Request]

- ❖ Take Site Photo, Browse or Select Photos of Sites
- ❖ Capture Signature of Site Owners



The image displays three sequential screenshots of the 'Update Ticket' mobile application interface:

- Left Screenshot:** Shows the 'Update Ticket' form for TicketID 1 at Site Name TCS. The status is 'Not Started' and the field visit date is 'December 31, 2001'. A modal menu is open over the 'Attachments' section, offering options: 'Take Photo', 'Choose from Photos', 'Browse', and 'Cancel'.
- Middle Screenshot:** Shows the 'Update Ticket' form for TicketID 5 at Site Name Emmar. The status is 'In Progress' and the field visit date is 'February 17, 2020'. The 'Field Engineer Remarks' field contains 'Partial Installation done.' and the 'Attachments' section shows a selected photo of a landscape.
- Right Screenshot:** Shows a signature capture screen with a large handwritten signature and a 'Save' button.

Service Visit – App for Field Services Management

Field Service Dashboard – Displays BI Report for Status, Service Type etc.,

[Field Service Dashboard]

- ❖ Displays the Status of the In-progress, Started & Completed tickets
- ❖ Power BI Graphical Reports on the basis of Status, Service Type etc,



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Thank You

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