Quick Start Pack
D365 Field Service
by Minsait

Oferta Quick Start Pack

Febrero 2022

Índice

minsait

01

Minsait, technological partner

Who we are

indra

Indra is currently the **leading technology in Spain** and one of the **main in Europe and Latin America**

Business Consulting   Technology   Digital Solutions
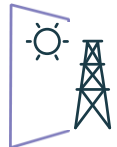
3.043 M€ sales | +49.000 Professionals | Projects in +140 countries | Local presence in 46 countries | 50% sales abroad

(2020 Data)

minsait by Indra

16% **Energy and Industry**	**11%** Telecom and Media	**17%** Financial services	**18%** AA.PP. and Health	**17%** Security and Defense	**21%** Transport and Traffic

Sistemas de Gestión Empresarial
- ERP Solutions
- Payroll and Human Capital
- Consolidation and budgeting

Tecnologías Avanzadas
- Business Consulting
- Technology
- Digital Solutions

Outsourcing y BPO
- User Management
- Application Maintenance
- Infrastructure Management

Paradigma
- Agile Projects

Ciberseguridad sia
- Digital Risk
- CyberSec Services & Solutions
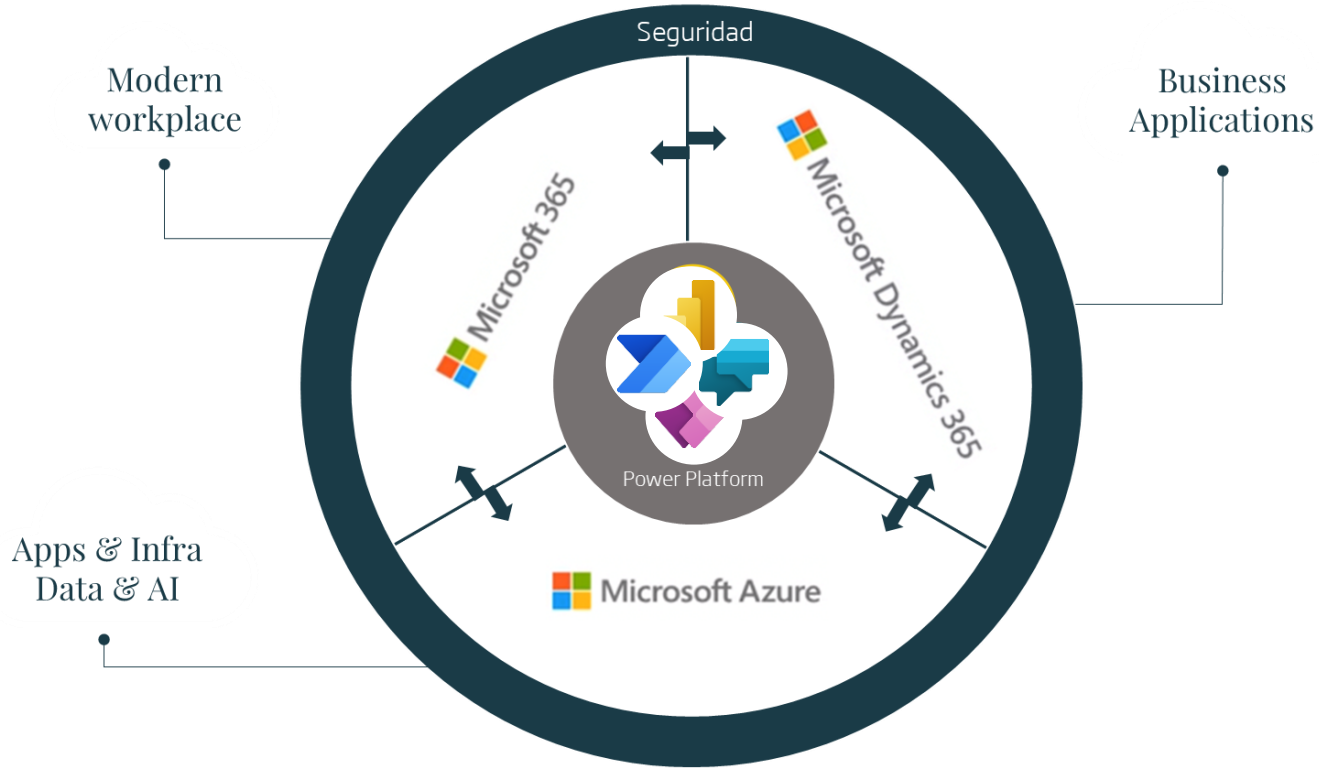- Digital Identity and Signature

02

Our vision and capabilities

Committed to thinking about the world through platforms and ecosystems

We approach our projects with a holistic and integral vision of the Microsoft Platform, with the perspective of Dynamics 365 as a core system but using the entire ecosystem of **Microsoft solutions as a platform to extend its capabilities**

Seguridad

Modern workplace

Business Applications

Microsoft 365

Microsoft Dynamics 365

Power Platform

Apps & Infra Data & AI

Microsoft Azure

Modern workplace

Productivity
Collaboration
Communication
Culture

Business Applications

Value creation
Efficiency
Profitability
Scalability

Apps & Infra Data & AI

Proactivity
Creativity
Competitiveness
Adaptation

minsait

We ensure the quality of the service thanks to the certifications that accredit us...

Microsoft Gold Partner

Partner of the year 2021
Data&AI Power Platform

Advanced Low Code Specialization

+1.000
Professionals with specialized knowledge

+250
Data & Analytics Experts

+300
CRM & ERP experts

+625
Certifications in the various platform solutions

+230
Experts in Infra & Apps

+120
Power Platform Experts

+15
Professionals accredited as Microsoft Certified Trainer

+100
Digital Workplace & M365

+1.000
Projects

+500
Clients

+12
Geographies

+300
Digital transformation projects in progress

Microsoft Azure Advanced Specialization: Windows Server and SQL Server Migration

Demonstrate our expertise in migrating and optimizing Windows Server and SQL Server-based production workloads to Azure.

+20
Years of experience

03

Quick Start Pack Dynamics 365 Field Service

3.1. Our Approach

Why you might need a Quick Start Pack?

Dynamics 365 Customer Service is a solution with enormous potential and many functionalities. But if your company does not need all the capacity to start the path of automated and personalized field service, then an approach "first adopt, then scale" will be your best ally in digital transformation.

We propose a rapid implementation of the standard functionalities slightly adapted to your business needs to achieve an agile digitization of the customer service processes ensuring a scalable solution aligned with product innovation

Quick Start Pack Key Benefits

Goals Oriented

1

We **consider** your **context** and **changing needs** of your business to take advantage of the transforming power of the business itself, making **common objectives** between the project and business team

Keep it simple!

2

To grant a **rapid deployment** we keep focus on **simplicity** and **efficiency** for all aspects of the project, identifying short-term **quickwins** that will define the roadmap of your solution

Embrace innovation

3

A **successful implementation** capable of scaling **aligned** with **product innovation roadmap**, guarantees the **quality** of the technical approach and minimizes the impact of changes

minsait

Smart Field Service
by Minsait

We enable teams to be more **efficient** with **proactive, connected field service** to achieve **maximum customer satisfaction**

Business impact

Efficiency
with adequate **resource allocation** and service **planning** improvements

Savings and profitability
Managing assets and resources efficiently with the and support of asset-centric processes

Productivity
allocate resources based on their skills, capabilities, and requirements for each service

Fulfillment of commitments
Control of works with a system that **comprehensively** manages the **services performed**

Agility and deadlines
reducing **execution times** and achieving **greater efficiency** in customer management

Time-to-value and customer retention
Improve the field service experience with greater **accuracy and quality**

Features

Mobility applications
Allowing technicians to work anywhere, both offline and online

Route optimization
Always guaranteeing the most optimal work during the day

Effective execution of work orders

Inventory
With a "zero stock" approach with static and mobile locations

Automation and AI
For the planning of resources and equipment, guaranteeing the success of meetings with the client

Self-service portals
to provide flexibility to customers, allowing them to program on their own time, directly from their devices

Predictive maintenance
IoT with real-time data to drive connected experiences

Mixed reality
for the resolution of customer incidents

Field Service

Remote Assist

Customer Voice
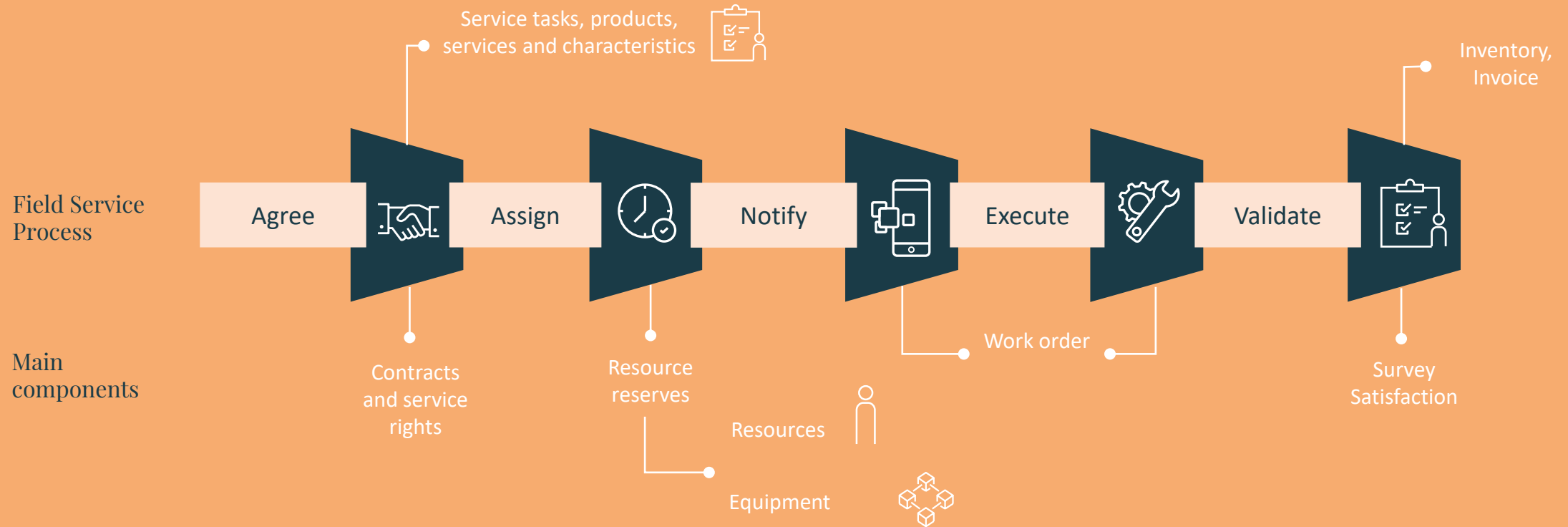
Proponemos un proyecto que cubra los siguientes bloques

Duración: 12 semanas

Importe total: 63,600 €

Configuración inicial

Dentro del alcance del proyecto se realizará la configuración inicial de la herramienta, se parametrizarán las entidades Cuenta, Contacto, Acuerdos, Activos, Productos, Listas de precio, Orden de trabajo, Tipos de incidente, Tareas de Orden de trabajo, Características, Recursos, Indisponibilidades y Actividades; personalizando los campos y vistas existentes en base a las necesidades recogidas durante el análisis.

Se crearán y personalizarán hasta 5 tablas maestras y 3 tablas personalizadas.

Acuerdos

Se configurará la entidad Acuerdo:
- Prefijo de los acuerdos y número inicial de acuerdo
- Creación de hasta 2 acuerdos
- Configuración de la periodicidad de reserva

Recursos

En el alcance del proyecto se realizarán las siguientes tareas:
- Creación de recursos de personal y maquinaria, equipos, equipamiento.
- Configuración de estados de reserva, geolocalización, requisitos de reserva, preferencias de recursos

Ordenes de trabajo

Se abordarán las siguientes tareas:
- Configuración de hasta 3 incidentes de orden de trabajo: Tareas de servicio, Productos, servicios, características.
- Configuración de la creación automática de Ots mediante acuerdos.

Tablero de Programación

Se configurará dentro de la herramienta el panel de programación:
- Vista de filtros y mapa
- Pestañas de configuración
- Configuración del programador
- Hasta 1 pestaña adicional

Migración inicial

Se realizará la migración inicial de las tablas Cuenta, Contacto, Activos, Recursos, Productos, Listas de Precio, Tareas de OT y Características.
La carga de datos se realizará mediante ficheros .csv. Minsait facilitará una plantilla que deberá rellenarse en el mismo formato.
La calidad del dato es responsabilidad del cliente.

Formaciones

Se realizarán **tres sesiones de formación** (workshops) con los *Key Users* en los que se abordarán los siguientes contenidos:
- Nociones básicas de Dynamics 365: navegación, búsquedas y creación/modificación de registros
- Acuerdos: Creación, actualización, datos relacionados, periodicidad de reserva
- Recursos: Creación de recursos, asignación, gestión de indisponibilidades.
- Órdenes de trabajo: Creación, gestión, programación.
- Panel de programación

Usuarios y roles

Creación de usuarios en Azure Active Directory.
Creación, configuración y asignación de hasta 2 **roles** de usuario adicionales a los estándar.

Procesos

3 Business Process Flows configurable through the standard or 2 Power Automates that extend the no-code application will be configured.

Documentación

Se entregará la siguiente documentación:
- Manual de usuario
- Diseño técnico y funcional
- Documento de cierre de proyecto

* Quedan fuera del alcance las integraciones con sistemas terceros, así como cualquier desarrollo o personalización fuera del estándar y lo explícitamente descrito en el alcance.

How we work?

Inside our methodology, we contemplate **4 lines of work** that cover all the necessary activities to ensure the success of the implementation

Thanks to **our differential capacities** we achieve the success of the initiative

Line A | Analysis, design and implementation

We propose an implementation strategy supported by workshops to **validate the approach and build an incremental solution**

Line C | Change management

At Minsait we have our own change management methodology under adaptive methodologies

Line B | User validation

The **participation and commitment** of the client is key to ensure an implementation that meets expectations. To comply with these Minsait will generate a **test plan and UATs** that the client must execute to validate the implemented solution.

Line D | Estrategia y gobierno

A successful implementation requires a **deep knowledge of the client's needs** and an **evolution strategy**

The teams and skills involved will be adapted according to the priorities of the moment

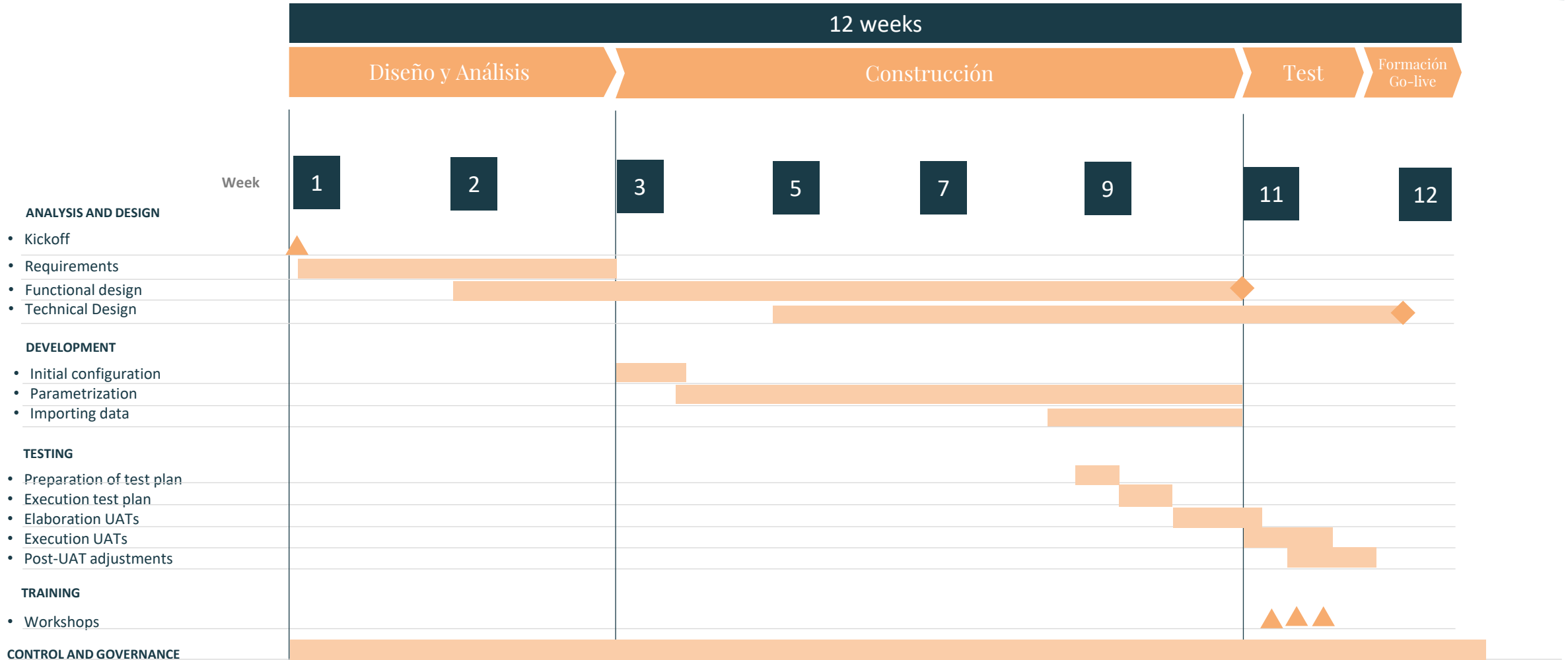We work with different technologies and take advantage of our experience in organizational efficiency programs

Flexibility

Synergies

Differential approach

Acceleration capabilities

Consolidated team
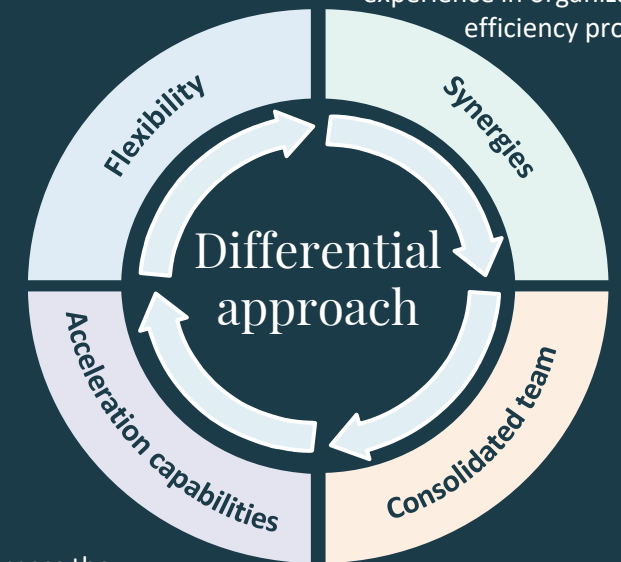
We harness the transformative power of the business itself

Specialized teams that collaborate in a multidisciplinary way

minsait

3.2. Planning

minsait

Thank you!

minsait

Mark Making the way forward

An Indra company