



# MiEngineeringServices in Dynamics 365

MiEngineeringServices

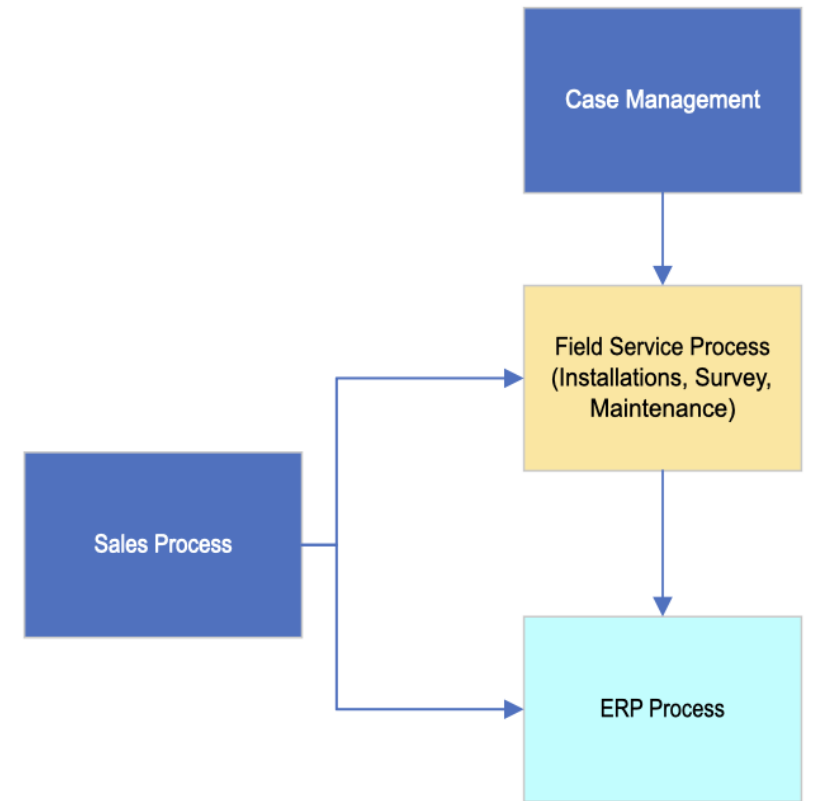
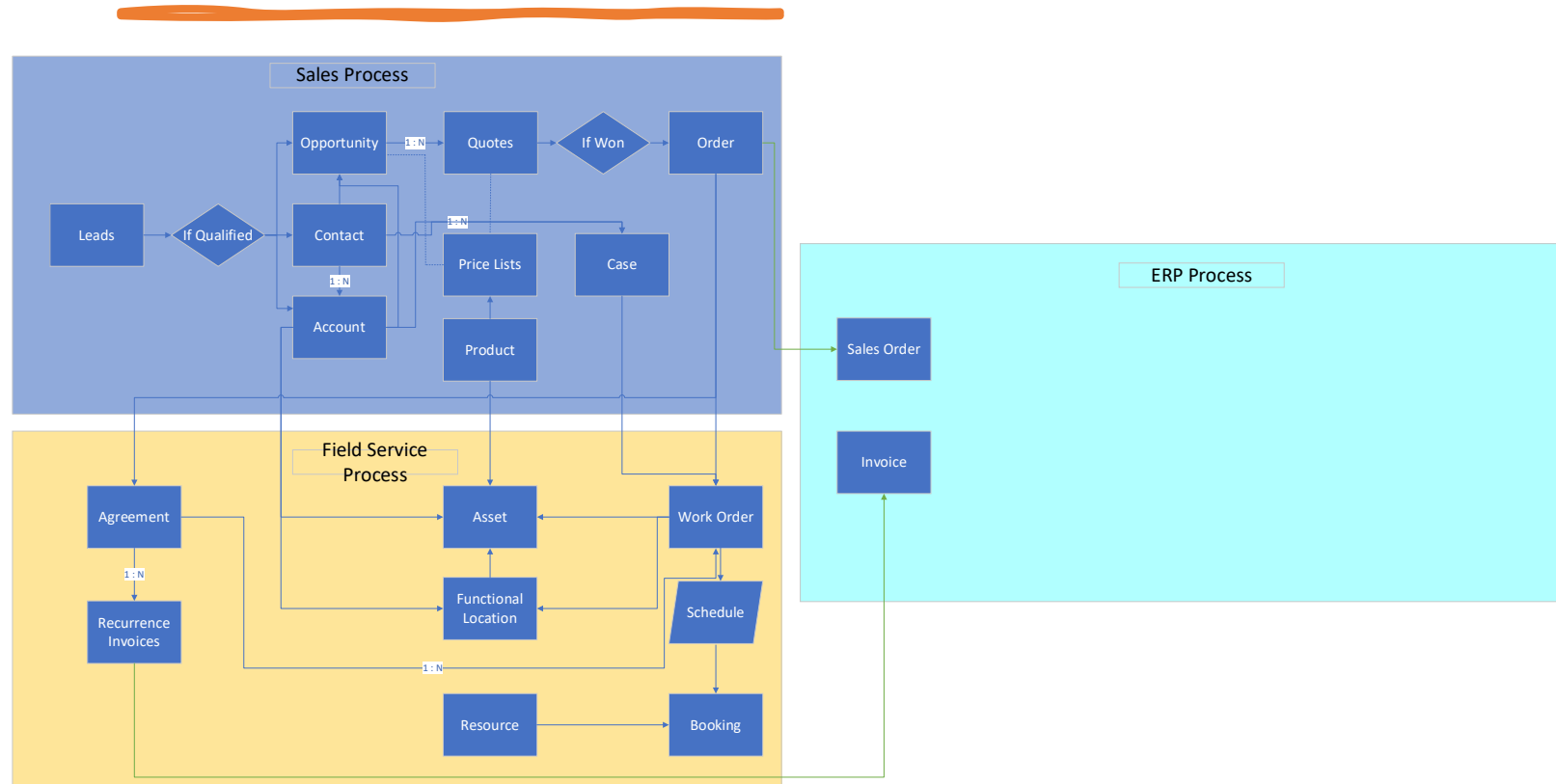
# System Overview - Modules

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- MiEngineeringServices is an App that works with Dynamics 365 Sales, Field Services and Integrates with Dynamics 365 BC or Wiise
  - Outlook Integration
  - SharePoint Integration
  - Microsoft Power Automate – Flow
  - Teams Integration



# Entity Relationship Diagram



# Customer Management

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- Accounts (Company)
  - Contacts
  - Customer Assets
  - Functional Locations
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- Customer Details: Physical Address, PO Box, General Ph No. Web Site.
  - Customer category: Active, Inactive or Potential
  - Customer Type: End User, Reseller, Fabricator, Design Engineers, EPCM
  - Ability to assign customers to the responsible Branch
  - Ability to group clusters of client into areas
  - Client Contacts and details Ph, Mobile, Email, Linked Inn etc
  - History of correspondence: Emails, Phone calls
  - Personal Activity/to do list
  - Project Manager: ability to link all relevant parties and correspondence.
  - Search options: Company name, contact name.

# Sales Process

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- Lead
- Opportunity
- Quote
- Order

# Field Service Process

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- Work Orders
- Scheduling
- Resources
- Agreements
  - Scheduling of installations and service work
  - Scheduling of Appointments
  - Scheduling of Quote expiry and follow up date
  - Completing all scheduled activities with notes of outcome and filed in customer history

# Case Management

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- **Cases**

- Full Case Management, Service Desk, Knowledge Base Capabilities

# Project Management

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- **Projects**

- Project Manager: ability to link all relevant parties and correspondence.