

BUSINESS GUIDE

# Using Tech to Coordinate Field Service Operations and Delivery Management





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*Integrating the most essential components of field service and delivery management into ERP can eliminate repetitive processes and manual work.*

Enterprise Resource Planning (ERP) is a game-changer for companies that have long relied on a combination of homegrown software systems, disparate applications and spreadsheets to manage their field service and delivery management operations. Where an ERP natively provides a complete suite of business management tools, the platform's value proposition grows once it is tailored to meet specific field service or delivery requirements.

Wholesale, retail and field services organizations that maintain inventory need technology that helps them select the best carrier to ensure a specific pallet of product arrives to a destination on time and within budget. In many cases, this means adopting a separate transportation management system (TMS) that integrates with a UPS or FedEx tool which determines costs, delivery timelines and other service options.

For example, vehicle transport services, who provide door-to-door delivery of cars and trucks for customers nationwide, rely on a team of drivers, field service techs and other workers to operate its vehicles and maintain its fleet. Last-mile delivery service contractors pick up packages at warehouses, distribution centers (DCs) or other drop-off points and then deliver the goods to the final customer.

These and other activities require connected, mobile technology solutions that allow customers to track their orders, obtain a proof of delivery (e.g. a photo of the package on the doorstep) and manage other steps in the delivery process. Orchestrating these movements is difficult when the only technology available is on-premises and disconnected.

This guide delves into the field service, transportation and logistics management challenges that organizations face when using aging technology and spreadsheets and explains how cloud ERP plus an integrated field service and delivery management application helps companies eliminate repetitive processes, reduce manual work and improve efficiencies.

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CHAPTER 1

# Moving Away From Aging Homegrown Systems

From the last-mile delivery services that bring packages to customers' doorsteps to the field service organizations that maintain equipment out in the field to the logistics providers shopping around for the best transportation rates, field service and delivery management organizations are looking to technology for help doing more with less in this fast-paced environment.

Across these sectors, companies are often saddled with aging technology and will tack on new applications to meet specific needs (i.e. a TMS for transportation management, Fishbowl for inventory management, etc.). With all of their data located in separate systems, these organizations wind up using spreadsheets and other manual processes to check stock, get order delivery updates and gain a complete picture of their operational performance.

"With all of their data siloed and not connected to the cloud, field service and delivery management operations can't give their customers the real-time updates that they've come to expect in today's connected world," said Matthew Maddox, President

at Global Data Services (GDS), a NetSuite Alliance Partner. The same companies can't tell their own field staff members when parts or equipment will arrive, nor do they have a mobile way to connect with those individuals while they're working out in the field.

Maddox said these and other challenges hamper productivity, create redundancies and decrease profits. The field service tech that drives 100 miles to install equipment at a customer site, only to find out that the equipment never arrived onsite, may wind up wasting an entire work day and a tank of gas making the needless round-trip—only to have to do it again once the site is ready.

"The company itself loses out on whatever revenue it would have made by doing the installation that day," Maddox added. "And, it has to double its transportation costs by sending that technician back out once the equipment is ready to work on. This is a pretty common occurrence and a major waste of time, money and effort."



# A Purpose-Built Solution

Onsight Field Service & Delivery Management (“ONSIGHT”) is a SuiteApp built by GDS, a team of software experts that previously supported more than 50,000 restaurant locations in North America. ONSIGHT handles the complete management of field service and delivery organizations by integrating their core activities with NetSuite, increasing efficiency and profitability, improving customer satisfaction and helping businesses scale up without the need for additional labor or technology.

Using ONSIGHT’s real-time order status capabilities, companies can track order progress based on preset and custom parameters. The application also provides notifications for customers and field workers, GPS tracking as well as a complementary workflow wallboard (a dashboard that provides visual insights into project progress and team member progress).

Through its work order scheduling functionality, ONSIGHT adds these capabilities to NetSuite:

- A resource allocation feature (for viewing all available resources on a single tab) and a drag-and-drop calendar for scheduling field service calls.
- Automated re-prioritization of work orders based on configured algorithms by customer, order type, equipment type or priority.
- Configurable and pre-packaged with 20 custom fields, ONSIGHT allows companies to quickly rename and assign fields for their unique business needs.
- Customizable map interface.
- Estimated duration to complete the field work order or delivery.
- Inventory availability and transfers.
- Notifications to customers and field technicians.
- Real-time chat between field technicians and dispatchers. These chats mimic typical mobile phone conversations but with the recordings stored on the field work order or vendor record in NetSuite (depending on the originating document).
- Resource Scheduler that ensures projects are assigned to the closest field worker and organizations can efficiently assign orders based on proximity.
- Route optimization that factors in different ticket or call priorities.
- Saved searches with conditional highlighting that identifies field work orders with high priorities or upcoming completion dates.
- Service Level Agreement tracking and reporting.



Many times, companies will use a separate mobile app for managing work orders. The problem is that the app doesn't connect directly with its central business system. This leads to data duplication and workarounds as companies attempt to make their field service management operations more cohesive. Utilizing mobile capabilities, ONSIGHT eliminates these pain points and also provides:

- Driving directions
- GPS tracking
- Inventory parts availability, utilization and tracking
- iOS and Android native applications
- Mobile calendar view
- Multi-terrain map interface
- Offline mode (for those times when techs are in areas with spotty Wi-Fi or cellular connections)
- Real-time access to service manuals

- Real-time capture of signatures and photos (for proof of delivery)
- Real-time chat for field technicians and dispatch

“We also built a map view that dispatchers can use to quickly see a tech's location when he or she is out on the road,” Maddox explained. “The map is updated every 60 seconds based on the GPS location of the tech's mobile phone or tablet.”

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GDS also built customized dashboards in NetSuite to address different lines of business within an organization (e.g. accounting, project management, warehouse management, manufacturing, etc.).

That way, each of those departments has its own custom dashboard that leverages ONSIGHT's data. “That data lives in NetSuite's system of record,” Maddox added.



## Up and Running in 60-90 Days

With a typical implementation time of 60-90 days (for both NetSuite and ONSIGHT, the latter of which takes about 80 hours to implement), the SuiteApp integrates the essential components of field service and delivery management into NetSuite.

Able to handle the entire field service and delivery management process—including receiving, repair, manufacturing, shipment and maintenance— ONSIGHT also manages billing workflows. Once an order is marked as “complete” in the ONSIGHT app, the billing team is alerted and an invoice is sent to the customer. Using scripting and workflows to automate this process, GDS helps field service and delivery management operations achieve 95% billing accuracy rates.

“A lot of our customers inaccurately charge for work because their field tech didn’t add the charges to their notes and/or invoices,” said Maddox. “We made it really easy for them by letting them record everything right in the mobile app, which means there’s a lot less of a chance that something is going to be missed.” This not only helps the company improve its own cash flow, but by eliminating billing discrepancies and providing customers with real-time access to information through NetSuite’s customer portal, it also raises their customer satisfaction levels by 80%, according to GDS.

Operations personnel and logistics managers will no longer spend unnecessary time reconciling information from multiple systems to answer common inquiries from customers. They’ll also be able to quickly produce reports for the decision makers and auditors that request them.

With ONSIGHT and NetSuite in place, companies can also reduce their dispatcher and project manager workloads by up to 50% through eliminating manual paper processes (including lost paperwork), improving business process workflow and reducing manual communication needs, allowing those professionals to focus on more important tasks.

The solution also helps to simplify complex paper-based and people intensive field service processes via automation. Providing 24/7 access to real-time data on any device drives better operational efficiencies and saves time. When they always know their field workers’ locations and the status of their assigned work, organizations can deliver a higher level of customer service, reduce the number of customer disputes regarding time spent or work completed and send invoices as soon as work is finished and the customer signs off on it.

CHAPTER 4

# Time to Make Your Move

As technology continues to advance, more companies are implementing automated processes to handle service tech dispatching, routing optimization, scheduling, inventory management and other mission critical activities. By replacing their on-premises systems and disparate applications with a leading cloud ERP augmented by industry-specific functionalities, field service and delivery management organizations can improve their operational efficiencies, reduce errors, improve customer service and enhance their bottom lines.

“We’re hearing from a lot of service and logistics companies that want to make the move now before their competitors do.”

Matthew Maddox, President, Global Data Services (GDS)







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