

# Hetek Systems Streamlining and Automation

**Presented by**

Aaron, Cheryl, Jiaren, Ritika, Sumedh

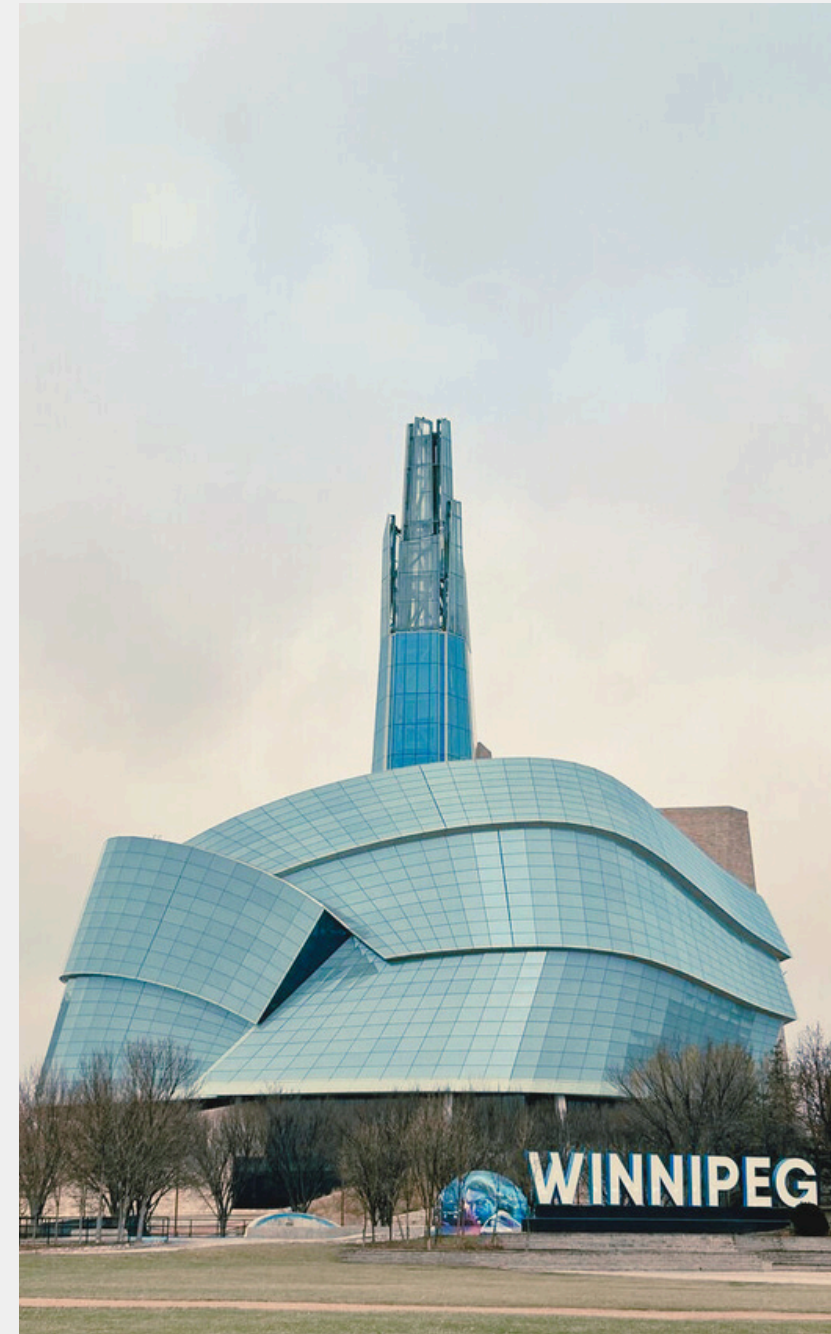
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29 November 2024

# Introduction

Project Goal: Streamline operations, enhance data management, and replace outdated systems.

- Automation: Reduce manual work through automated processes.
- Efficiency: Simplify workflows and eliminate redundancies.
- Decision-Making: Provide real-time insights with advanced reporting tools.
- Scalability: Build a flexible system to support business expansion.



# Current Challenges

Multiple independent tools lack integration, creating data silos.

**Fragmented Platforms**

**Manual Processes**

High reliance on manual tasks increases errors and inefficiencies.

Existing systems cannot support Hetek's growth needs.

**Limited Scalability**

**Data Silos**

Disconnected systems make it hard to consolidate and analyze data.

# Objectives of the Project

**Provide a single, integrated system to replace fragmented platforms.**

**Automate repetitive tasks and reduce manual errors.**

**Build a scalable system that adapts to future business needs.**

**Provide real-time data visibility and reporting.**

# SOLUTION?

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Transforming  
Operations with  
**Microsoft Dynamics  
Field Service**





# Transforming Operations with Microsoft Dynamics Field Service

Microsoft Dynamics Field Service was chosen for its comprehensive tools for managing work orders, customer assets, and technician schedules.

## Key Solution Components:

- Automated Workflows
- Customer Self Service Portal
- Advanced Scheduling Tools



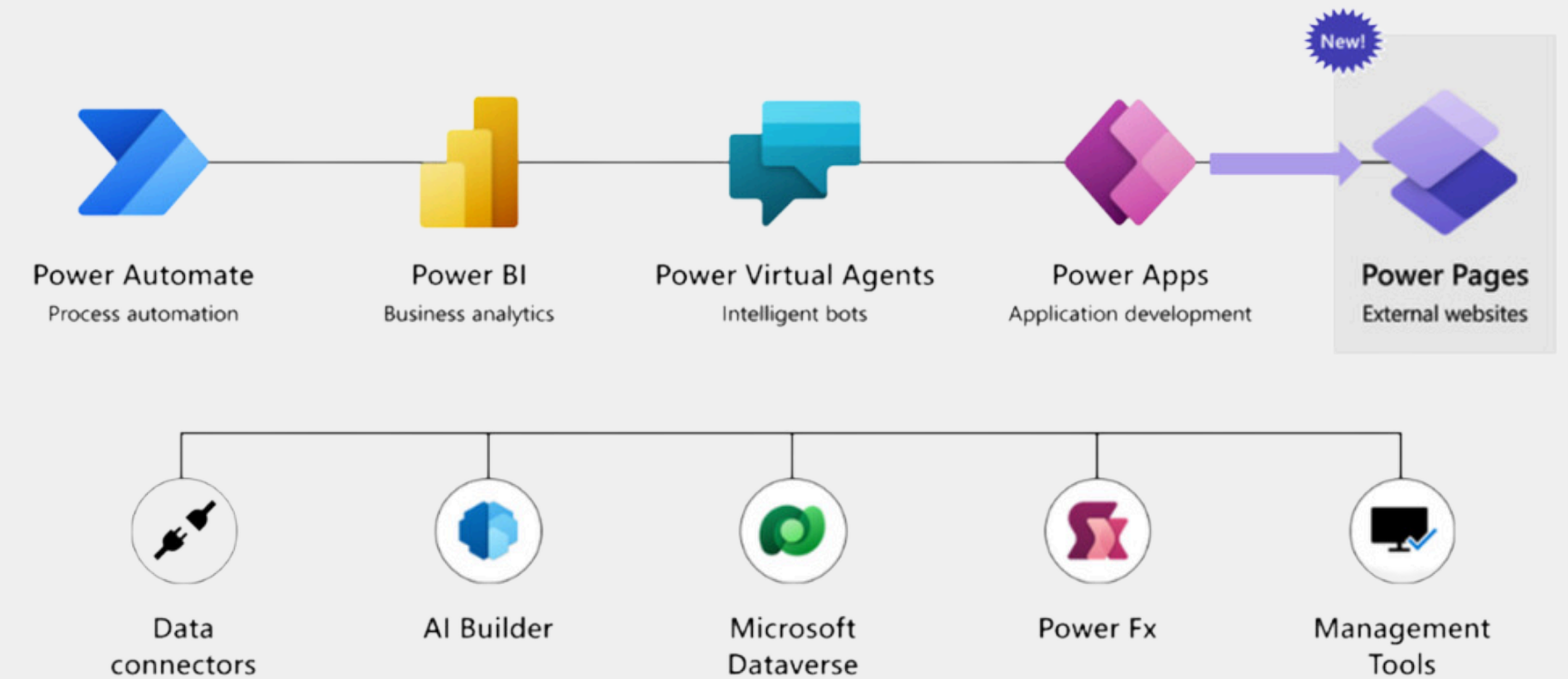
# Features Empowering Hetek Solutions

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- Streamlined Work Order Management:
  - Automatically generate, track, and update work orders in real-time
- Certificate Automation:
  - Automatically fill templates with equipment and customer details
- Optimized Scheduling:
  - Notifications for upcoming work orders, ensuring proactive service planning

## Microsoft Power Platform

The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications



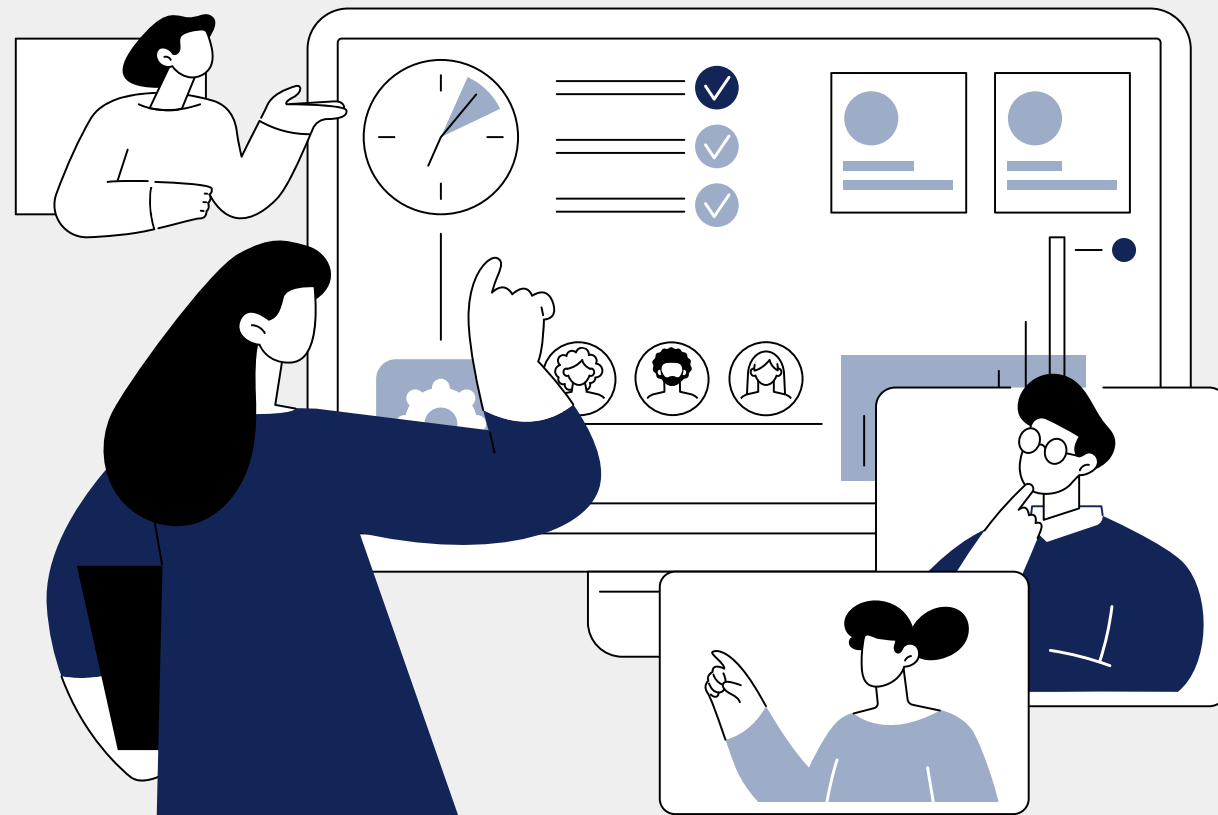
# Dynamics Field Service v/s Field Point

Feature	Microsoft Dynamics Field Service	Field point
Integration Capabilities	Seamless native integration with Microsoft tools.	Limited integration capabilities; often requires additional middleware.
Automation	Advanced automation, including AI-driven scheduling.	Limited automation; relies more on manual workflows for scheduling.
Scalability	Highly scalable, supporting growth and complex operations with ease.	Scalability is limited, requiring significant effort to expand.
Mobile Application	Feature-rich mobile app offering real-time work order updates, asset details.	Functional mobile app, but capabilities are limited.



# Updated work flow process

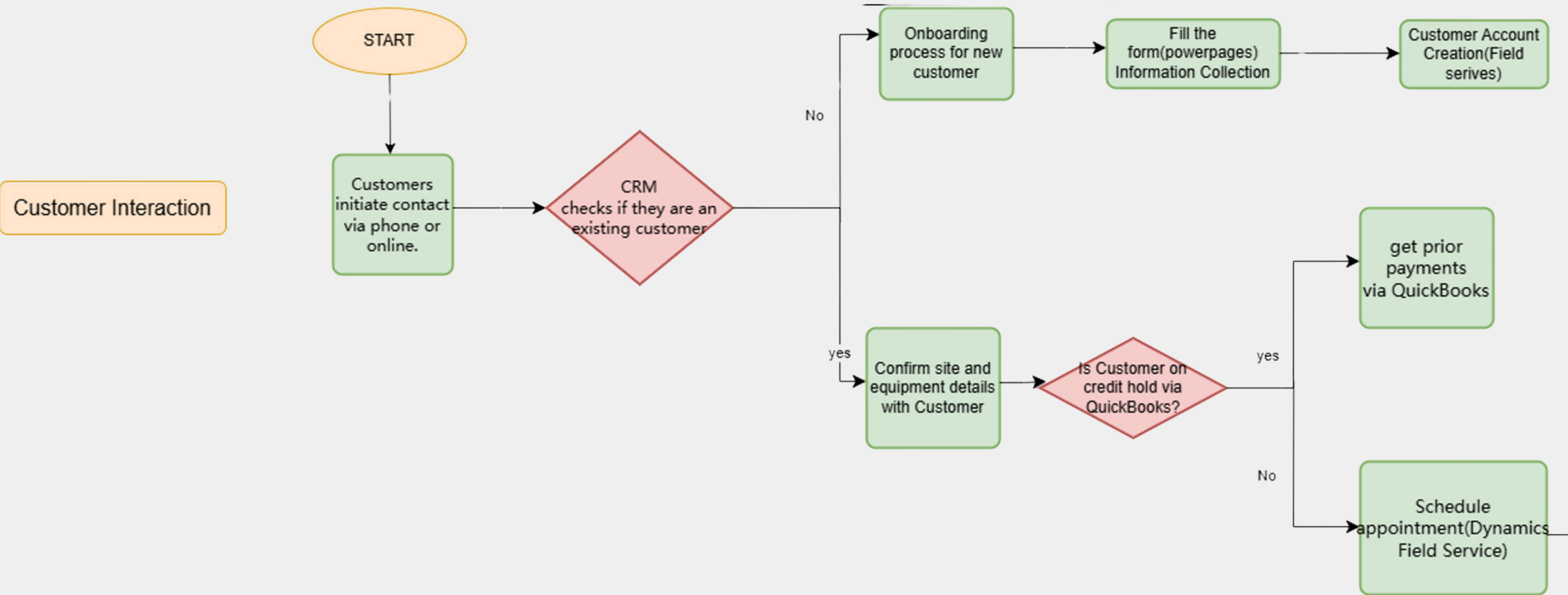




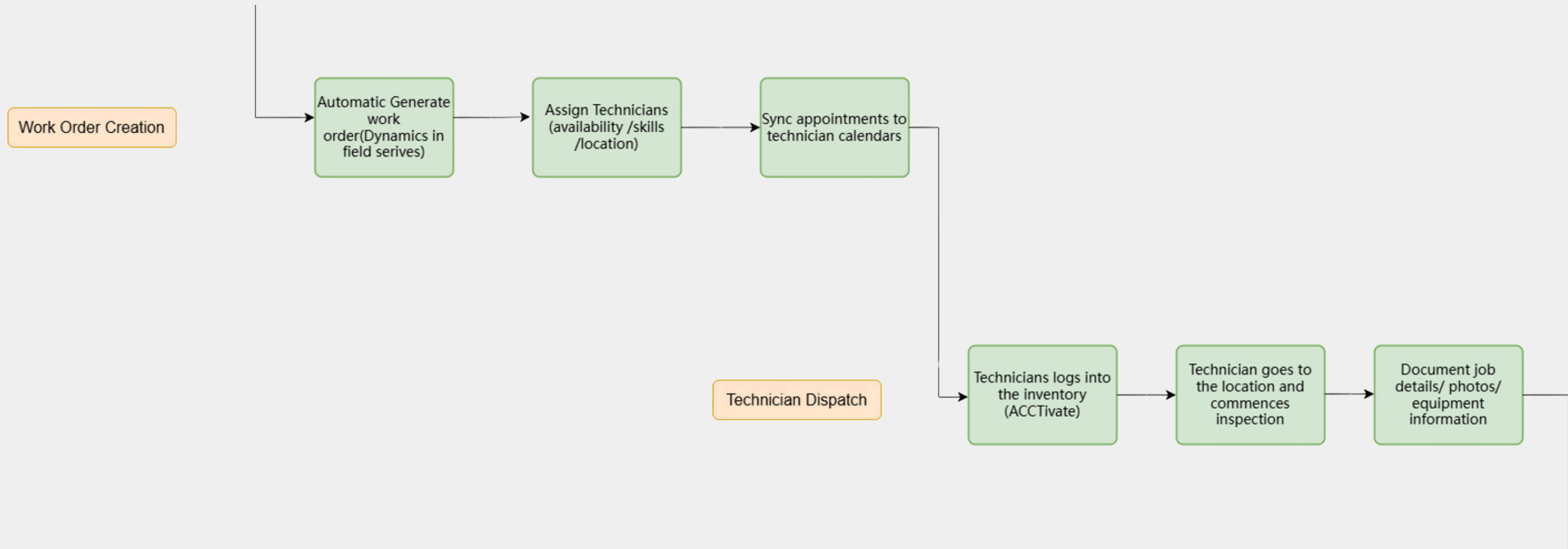
## What it helps with?

- Centralized Customer Data
- System Integration
- Automated Workflows
- Proactive Communication
- Efficient Financial Processes
- Enhanced Customer Experience

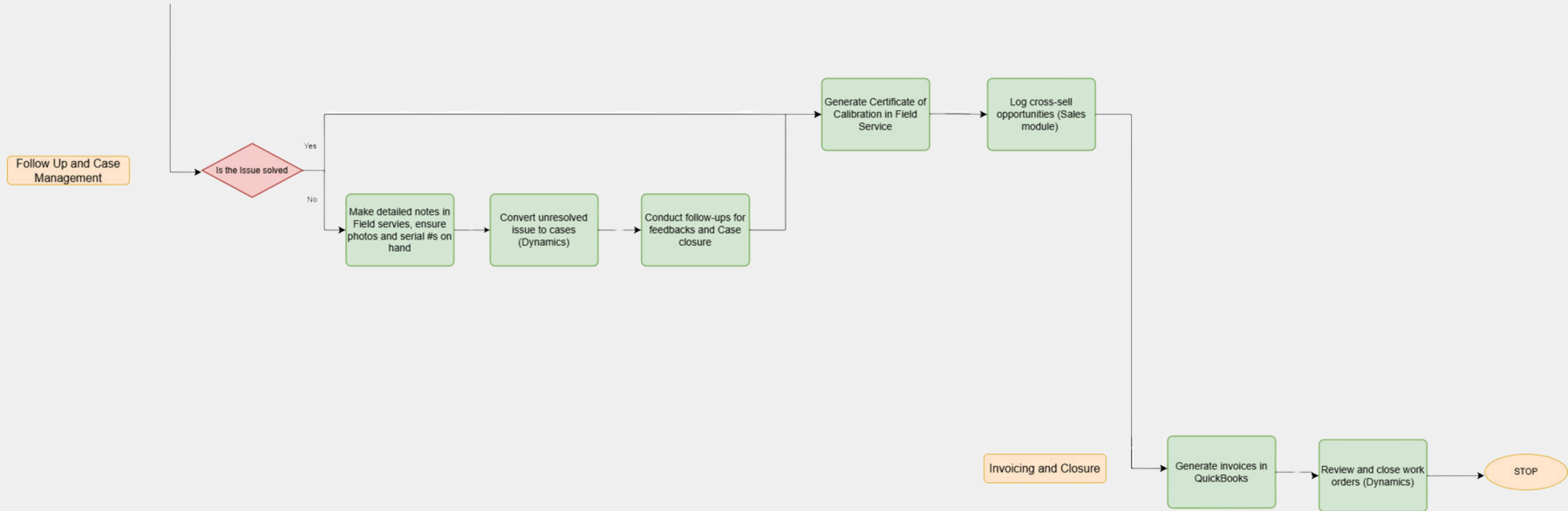
# Customer Interaction Phase



# Work Order Creation & Technician Dispatch Phase

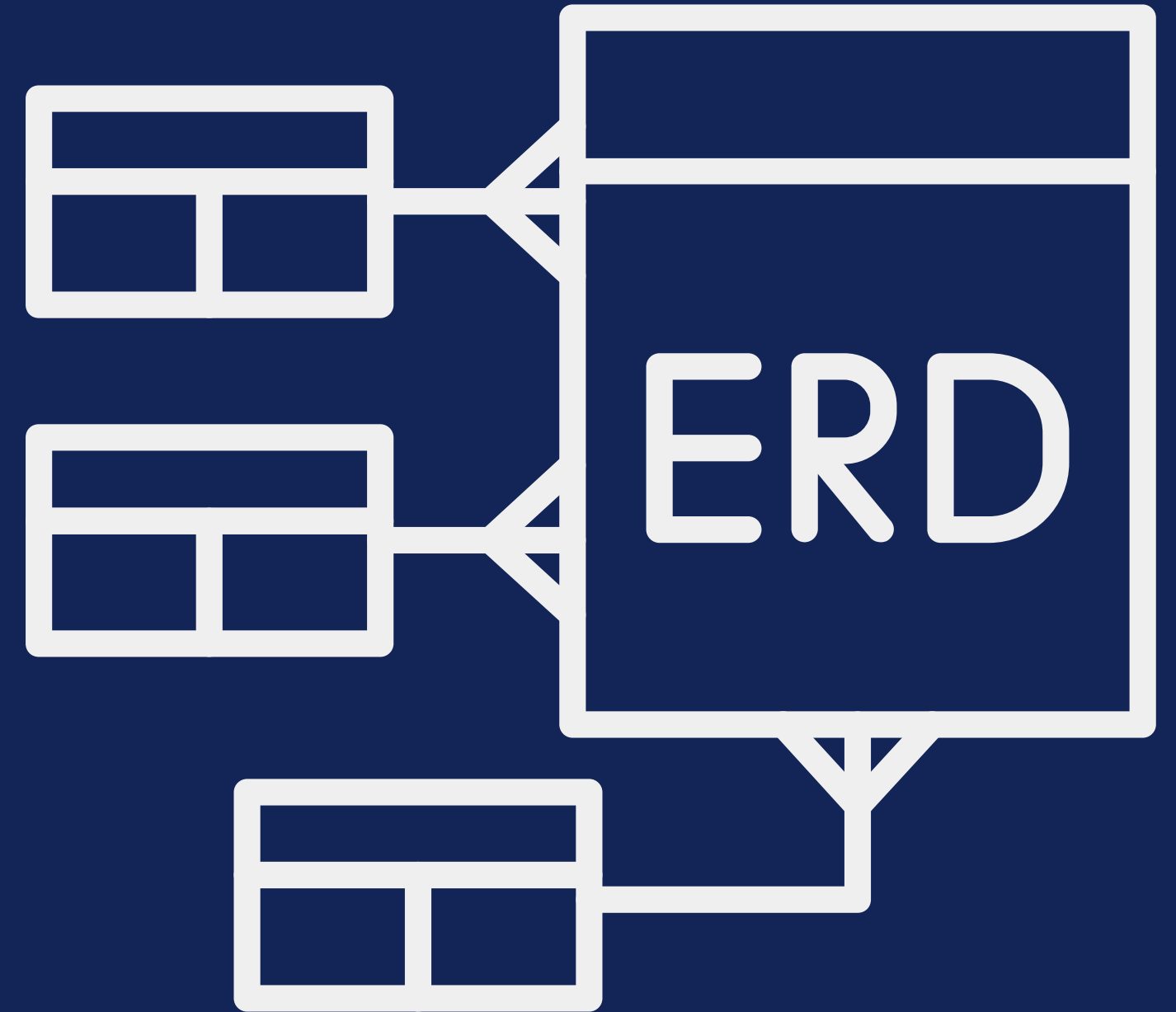


# Follow up, Case Management and Invoicing Phase

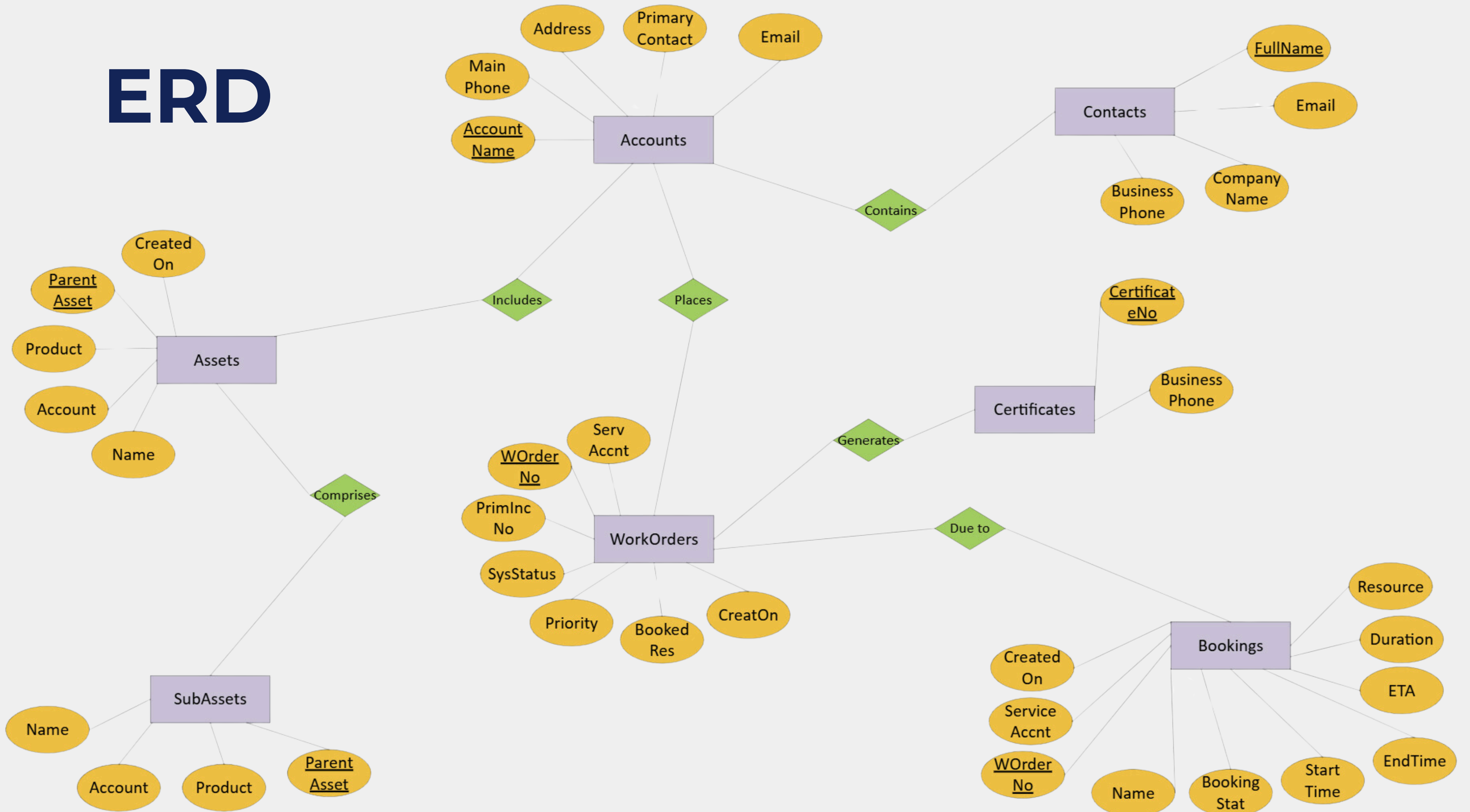




# Entity Relationship Diagram & Integration Strategy



# ERD



# Additional Entities

## Bookings

Manages scheduled work orders and appointments for field technicians.

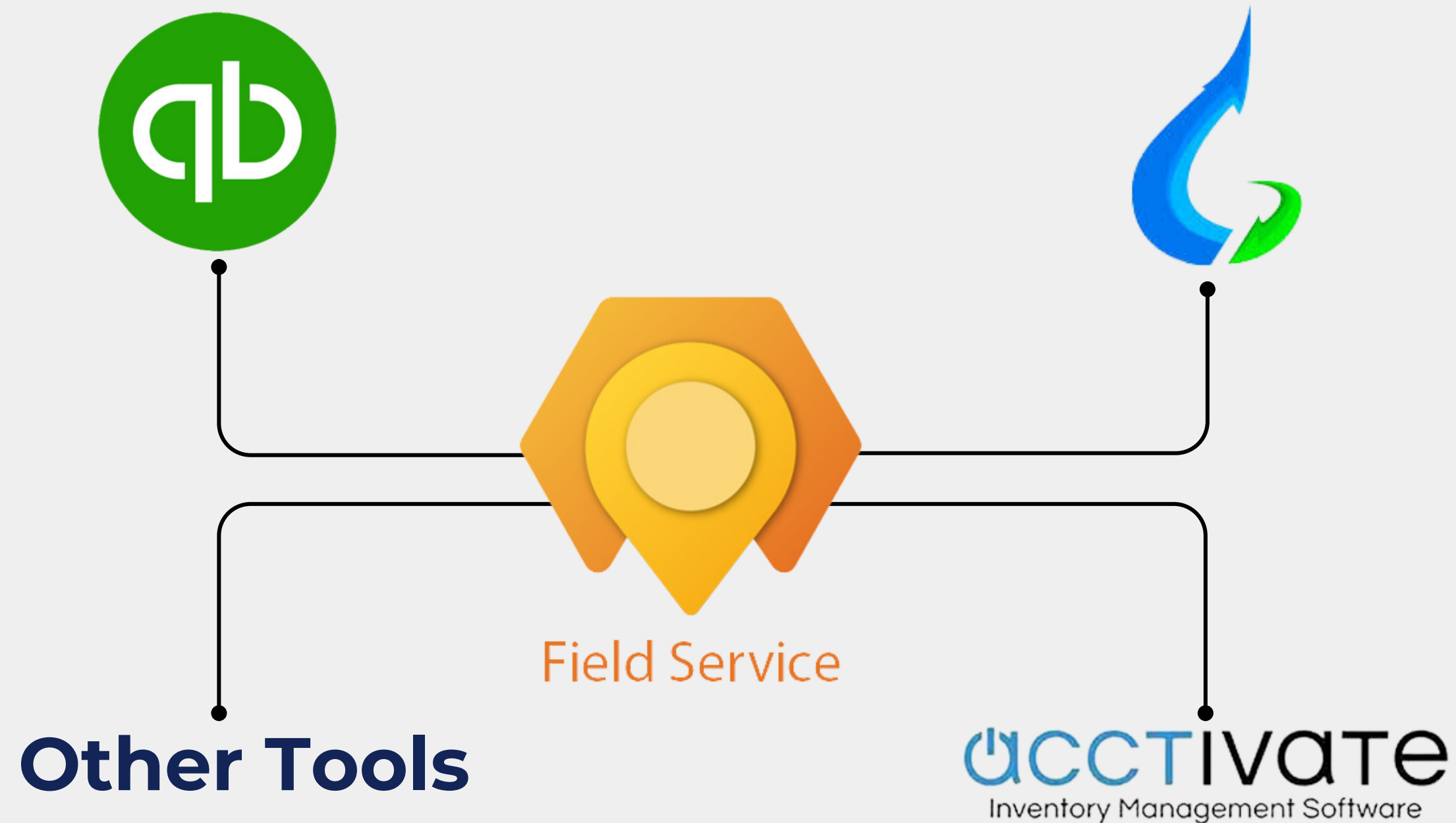
## Time of Request

Captures the timestamp of when a service request is initiated.

## Cases

Tracks customer issues or service requests for resolution and management.

# Integration



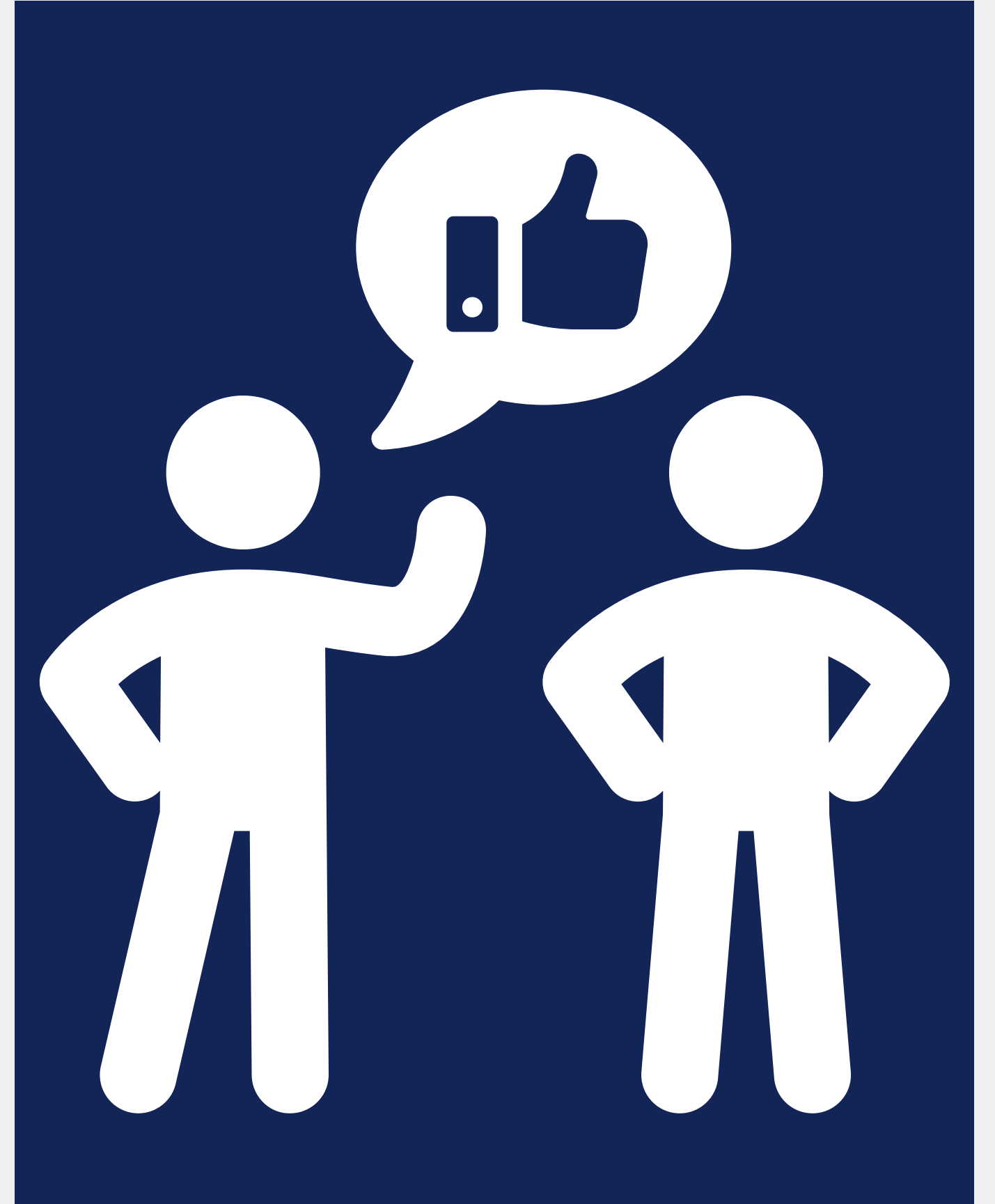
## Integration ensures:

Streamlined Operations

Enhanced Productivity

Scalability

# Recommendations & Future Outlook





# Why Focus on **Continuous** Improvement?

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- Current achievements:
  - Streamlined processes and automation.
  - Centralized data and improved productivity.
- Challenges to address:
  - Maintaining system alignment
  - Employee confidence & efficient system use.





# Recomendations

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01.

**Regular System Audits**

02.

**Employee Training Programs**

03.

**Feedback Loops**

04.

**Security Audits**

# Opportunities for Growth

**Advanced Analytics Integration**

**Customer Self-Service Portal**

**IoT Capabilities**

**Improved Mobile Application**

**Expanded APIs**

Conduct system  
& security audits.

**Immediate**

**Immediate**

Gather feedback  
& Initiate training  
sessions.

## How Do We Move Forward?

Pilot customer portal  
& analytics tools.  
Test IoT integration

**Mid - Term**

**Long - Term,**

Fully scalable.  
Adaptable CRM  
system.

# Driving Future Success



- Streamlined operations and enhanced productivity.
- Improved employee and customer experiences.
- Continuous training, audits, and innovation.



# THANK YOU!

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