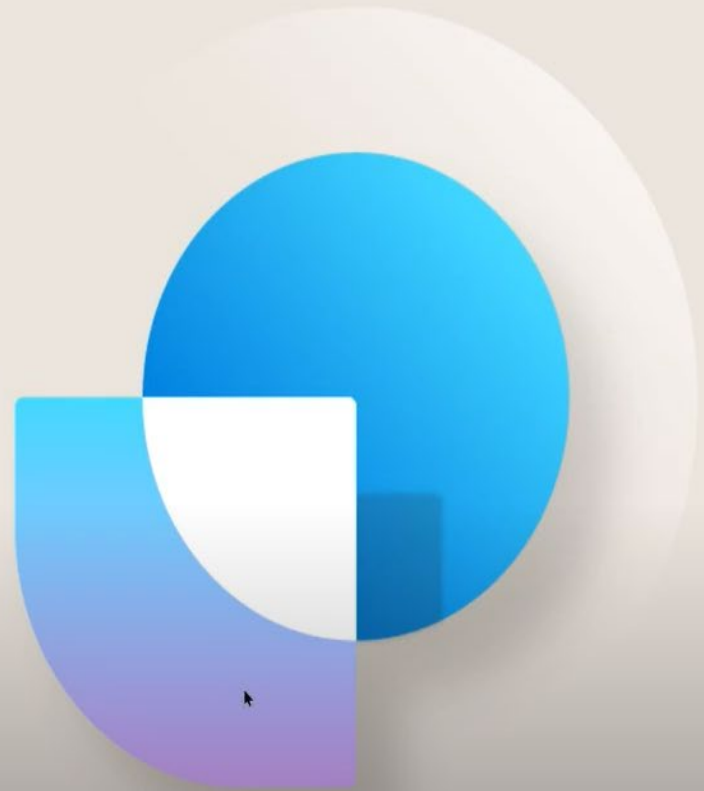


SRE Asset Management Services



 Microsoft Dynamics 365

Asset Management Overview in Dynamics 365 Supply Chain Management

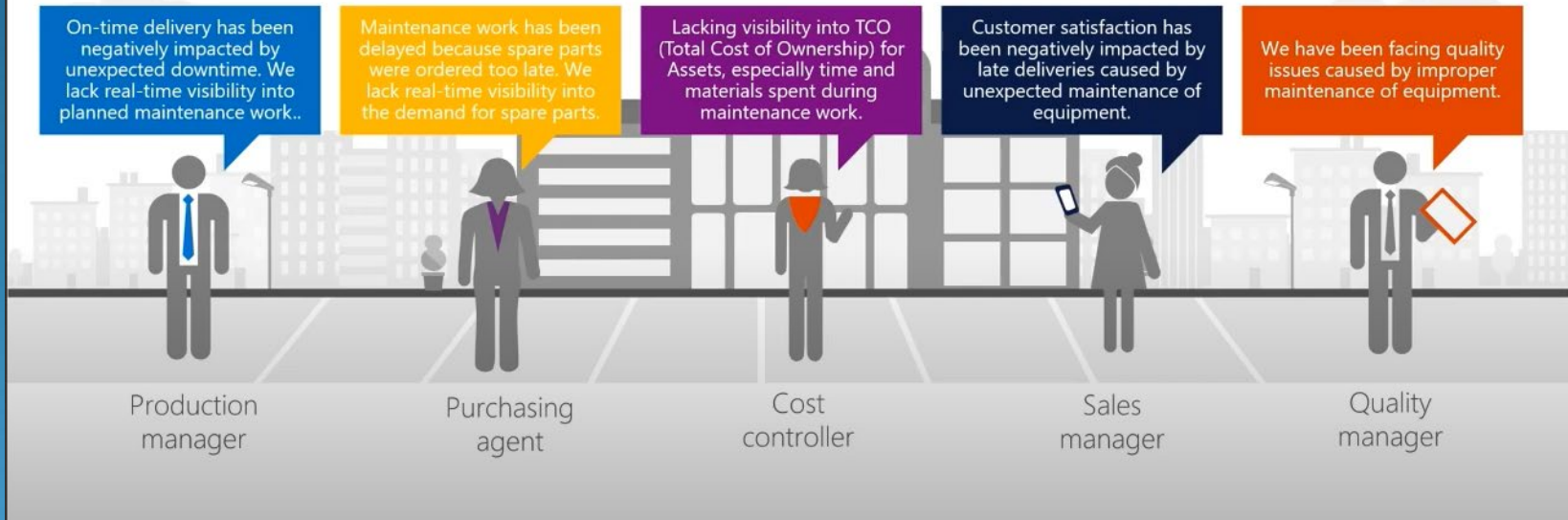


Asset Management

- SRE deployment of a new Asset Management Program
- Goal - Utilize our existing platform to build and deploy a New Asset Management Strategy
- Outline - The following slides outline the capabilities of our existing platform.
- This allows execution utilizing our existing network of field technicians.
- Our fully integrated Mobile Tech solution provides real-time updates and is fully integrated with Service Channel, FL Pilot and Fexa.
- Alternatively, our team would be happy to assist in the deployment or update of your existing Asset Management Program.

Lacking visibility into maintenance activities impacts everybody

Technology provides solutions to existing and emerging problems



Benefits of asset management



Reduce asset
maintenance costs



Improve equipment
uptime and lifespan



Increase operational
efficiency

Asset management scenarios



Production equipment



Warehouse equipment



Shipping fleet



Facility maintenance



Customer assets



Leased assets

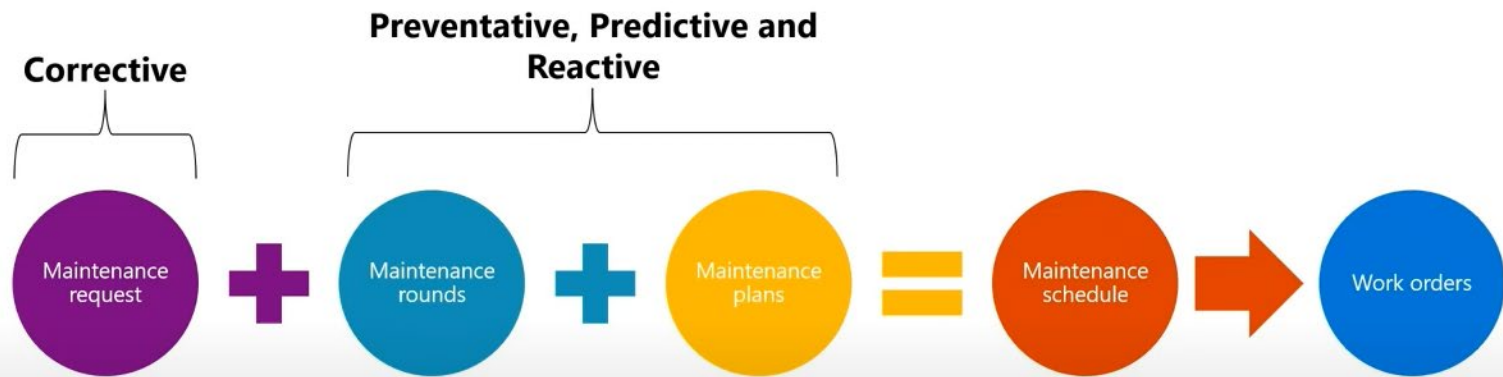
Acquire to dispose in Dynamics 365

 ACQUIRE	 INSTALL	 MAINTAIN		 DISPOSE
Acquire fixed assets	Functional locations	Breakdown maintenance	Budget & cost control	Dispose of fixed assets
Capitalize fixed Assets	Multi-level asset structure	Preventive maintenance	Schedule board	Electronic reporting
Transfer, revalue, split fixed assets	Asset register	Analytics & KPIs	Mobile execution	
Depreciate fixed assets	Spare parts control	Maintenance checklists	Asset history	
Derived books	Maintenance plans	Fault management	Maintenance rounds	

Asset management and other modules



Maintenance concepts



Project management and accounting integration

Forecast maintenance costs for time and materials

Track procurement of spare parts against project

Record worker time spent on maintenance activities

Bill for maintenance on customer-owned assets

Different projects for different assets, asset types, work order types

Asset Management home page

Finance and Operations Preview

Search for a page

USMF

Contoso Entertainment System USA

Search people ...

< September 2022 >

Su Mo Tu We Th Fr Sa

1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30

Work items assigned to me

Please investigate the dependencies an...
Check Business Impact

- Bank management
- Cost analysis
- Financial analysis - all companies
- Outbound work planning
- Released product maintenance
- Benefits
- Cost control
- Financial analysis - current company
- Payroll management
- Resource lifecycle management
- Budget planning
- Customer credit and collections
- Financial period close
- People
- Retail and Commerce IT
- Business document management
- Customer invoicing
- Fixed asset management
- Personnel management
- Revenue management
- Business processes for human resources
- Customer payments
- General journal processing
- Pricing and discount management
- Sales order processing and inquiry
- Business processes for payroll
- Data management
- Invoicing
- Product readiness for discrete manufacturing
- Sales return processing

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New Asset Setup

The screenshot displays a web application interface for 'New Asset Setup'. The interface is divided into two main sections: a list of existing assets and a 'Create asset' form.

Asset List:

Asset	Name	Parent	Children	Asset type	Manufacturer	Model
AK-101	AK-101 Air Knife for Line 1			Air Knife		
AK-110	Arush's Test Asset			Air Knife	Ford	Model S
AK-201	AK-201 Air Knife for Line 2			Air Knife		
AK-301	AK-301 Air Knife for Line 3			Air Knife		
BLN-101	BLN-101 Blender for Line 1	EX-101		Blender		
BLN-201	BLN-201 Blender for Line 2	EX-201		Blender		
BLN-301	BLN-301 Blender for Line 3	EX-301		Blender		
CL-101	CL-101 Classifier for Line 1			Classifier		
CL-201	CL-201 Classifier for Line 2			Classifier		
CL-301	CL-301 Classifier for Line 3			Classifier		
COM-001	COM-001 Air Compressor			Air Compressor		
COM-002	COM-002 Air Compressor			Air Compressor		
DCD-101	DCD-101 DC Drive for EX-101	EX-101		Drive-DC		

Create asset form:

IDENTIFICATION

Asset:

Name:

Effective:

PARENT ASSET

Asset:

Name:

Effective:

DETAILS

Asset type:

Manufacturer:

Model:

FUNCTIONAL LOCATION

DEF

ASSET

Functional location:

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New Asset Setup - Barcode / Tracking

Dynamics 365 Retail > Retail > Inventory management > Bar codes and labels > Bar codes

USRT

Save + New Delete Create bar codes from number sequence Create/Update bar codes Display dimensions OPTIONS

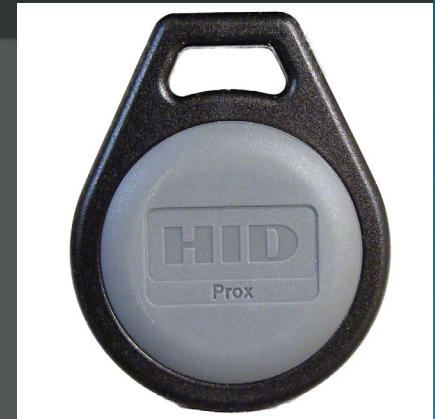
Item - bar code

Filter

Overview General

Variant number	Item number	Configuration	Size	Color	Style	Bar code setup	Bar code	Quantity	Unit
0001	0003					EAN13	1600000000063		Ea
	0004					EAN8	10000212		Ea
	0006					QtyEmb	9000000060005		Ea
	0007					PriceEmb	020000700007		Ea
	0030					EAN13	1633000000061	2.00	dz
VN-00001	0140		Large	Black		PriceEmb	020014000001		Ea
VN-00004	0140		XLarge	Black		EAN13	1500001402838		Ea
VN-00008	0140		Small	Blue		QtyEmb	9000001400008		Ea
VN-00011	0140		Large	Green		EAN13	1500001402234		Ea
VN-002904	7003	RKC0000044				EAN8	10000229		ea
VN-001799	81100		36	Dark Grey	Regular	EAN128	2246587365100		ea
VN-002668	81223		6	Grey	Regular	EAN128	2246587365223		ea

Barcodes, RFID, BLE Beacon Tracking, Indoor Positioning



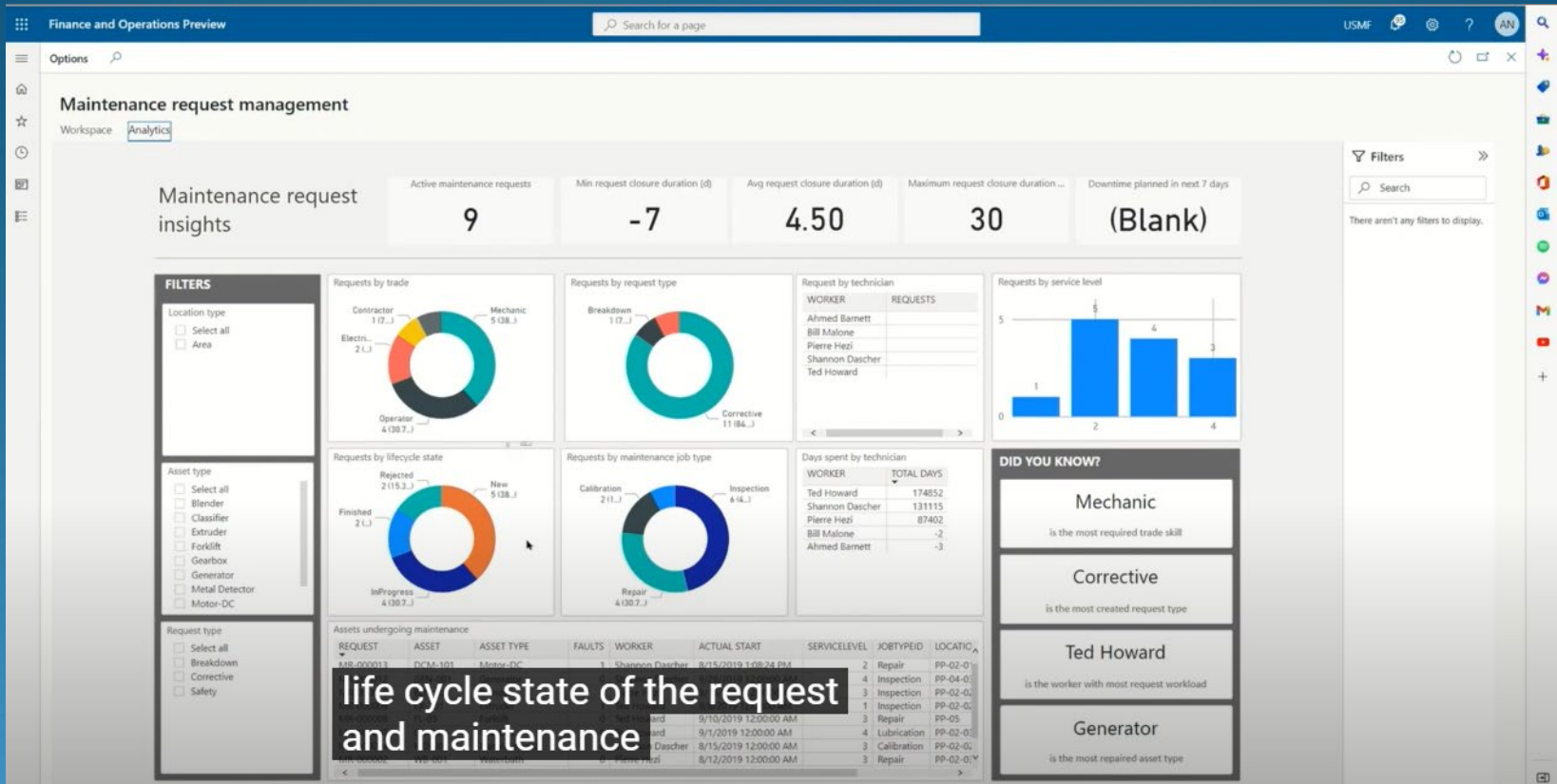
ACQ: 08/04/2020 SE NO: DES123

Contoso Entertainment System USA
FA: FURN_FIX-000010

ACQ: 08/04/2020

Contoso Entertainm
FA: FURN_F





Finance and Operations Preview

Search for a page

USMF

AN

Work order management

Workspace Analytics

Summary

0.00 Completion

0 Scheduled

2 Delayed

7 Unscheduled

3 Work orders with faults

1 Work orders with maintenance...

Active work orders

Active work orders Filter Create work order Update work order state

Work order	Start date	Current lifecycle state	Description	Functional location	All maintenance jobs scheduled to
WO-000001	8/15/2019	Pending	Main motor is emitting a high pl...	PP-02-01	
WO-000004	8/29/2019	New	Extruder Line Weekly PM	PP-02-01	
WO-000005	8/22/2019	Scheduled	Emergency Generator Weekly PM	PP-04-03	Bill Malone
WO-000006	8/23/2019	Scheduled	Emergency Generator Weekly PM	PP-04-03	Bill Malone
WO-000007	9/1/2019	Released	Repair coupling cover. It has a d...	PP-02-03	
WO-000008	8/29/2019	New	Weld small stress crack on Wate...	PP-07-02	
WO-000011	8/20/2019	InProgress	Line 2 Extruder has a barrel guar...	PP-02-02	
WO-000012	9/20/2019	New	Replace Knives on Pelletizer for ...	PP-02-02-01	
WO-000017	9/13/2022	New		PP-02-01-01	

See more

Links

Active functional locations Active assets Active work orders

would take us into the form that shows the results

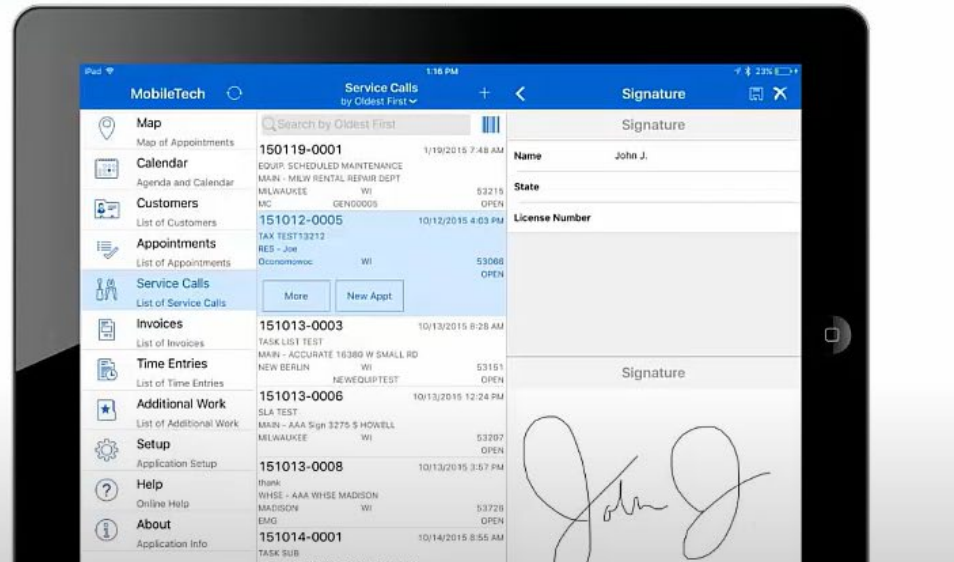
Additional resources

- Microsoft docs:
 - [Asset management overview](#)
 - [Integrate asset management with fixed assets](#)
 - [Integrate Asset management with Dynamics 365 Guides](#)
 - [Sensor Data Intelligence home page](#)
 - [Set up the Asset management mobile workspace](#)

Our Digital work order platform allows real-time updates and fully integrated performance. This allows project execution with consistency and at scale.

Agenda – Overview and Demo

- Overview of Field Service
- Key2Act Service Board
- Key2Act Mobile Tech
 - ✓ Mobile functions
 - ✓ Demo
- ✓ Recap



Graphic Scheduling Board and real-time GPS data provide excellent PM tools

The image displays a software interface for a scheduling board and a real-time GPS map of the United States. The map shows various service request locations (SR) across the country, with some locations marked with numbers like 48, 13, 12, and 19. The scheduling board on the left lists technicians and their assigned tasks, including software updates and site visits.

Technicians	7A	8A	9A	10A	11A
Aarnold, Joseph MILWAUKEE BR. TEC COMMERCIAL	160211-0002 A1 SOFTWARE-6950 INDUSTRIAL LP TRUCK 1 GREENDALE				
Abbott, John MILWAUKEE BR. TEC COMMERCIAL	160106-0001 CEDAR 15500 W CLEVELAND TRUCK 2 NEW BERLIN				
Anderson, Bart MILWAUKEE BR. TEC COMMERCIAL	161122-0002 A1 SOFTWARE-6950 INDUSTRIAL LP GREENDALE				
Baker, Donald MILWAUKEE BR. TEC COMMERCIAL	160901-0002 ACCURATE 16330 W SMALL RD NEW BERLIN	161018-0004 AAA Sign 3275 S HOWELL MILWAUKEE			
BERGERON COMM. MILWAUKEE BR. TEC COMMERCIAL	160722-0001 A1 SOFTWARE-6950 INDUSTRIAL LP GREENDALE				
CRUGER ENGINEER MADISON BRAN. TEC COMMERCIAL	161005-0001 A1 SOFTWARE-6950 INDUSTRIAL LP GREENDALE	161018-0001 AAA Sign 3275 S HOWELL MILWAUKEE			
Dunwoody, Anne MILWAUKEE BR. TEC COMMERCIAL	CEDAR 15500 W CLEVELAND D 15600 W.	170628-0001 ACCURATE 16330 W SMALL RD NEW BERLIN	170628-0001 ACCURATE 16330 W SMALL RD NEW BERLIN	PTO DAY	
Edwards, Terry MILWAUKEE BR. STC COMMERCIAL	170104-0001 A1 SOFTWARE-6950 INDUSTRIAL LP	160405-0001 CASH CUSTOMER			

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SRE is Fully Integrated with Service Channel, FM Pilot, and Fexa. As an alternative, we are also integrated with our own private Customer Portal

The screenshot displays the ServiceChannel Work Orders interface. The main view shows a list of work orders with columns for ID, category, priority, and dates. A detailed view of a specific work order is shown on the right, including customer information, description, and technician details.

Work Orders List:

Work Order ID	Category	Priority	Scheduled (30 Days)	Customer	Created/Updated
249380604	REPAIR - REACTIVE	0441 (R) (R)	SCHEDULED (30 DAYS)	LOWE'S	JUL 05, 2023 17:28 CST

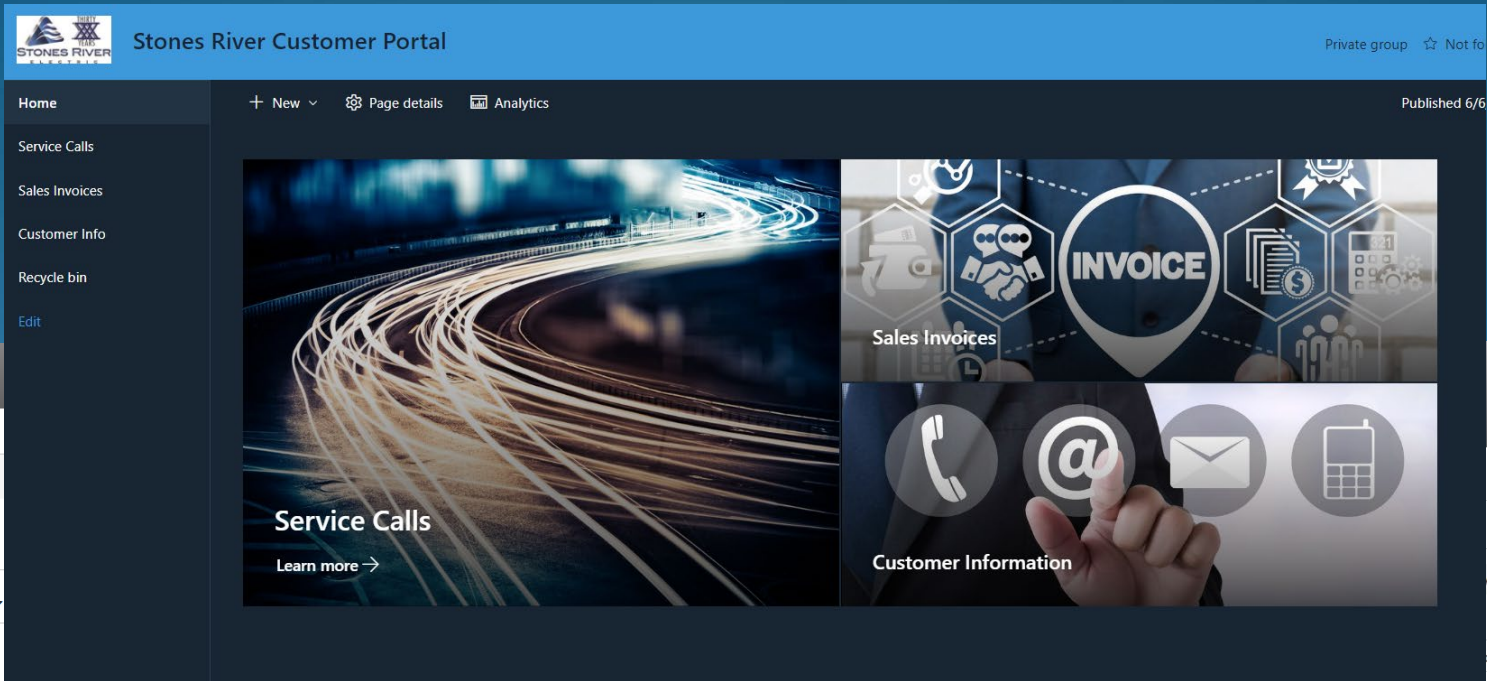
Work Order Details (249380604):

Customer: LOWE'S, LOWE'S COMPANIES, INC.
Location: LOWE'S #0441, LOWE'S #0441
Service Call ID: 230727-0001
Description: REF--230505-0005-LEAD TIME FOR MATERIAL ORDERED FROM WAREHOUSE 1-2 WEEKS--SUBMITTING QUOTE, WORK ORD IN PROGRESS/DISPATCH CONFIRMED
Problem Type: ELECTRICAL
Division: 300 Local
Subsension ID: [Link]
Call Type: ELS Service-Elect
Priority: 2 USER-DEFINED
Customer P.O. Number: 249380604
Contract Number: [Link]
Equipment ID: [Link]
Task Code: [Link]
Technician ID: PAYTONMCCA, MCCAIN, PAYTON
Date: 7/10/2023 Monday
Estimated Hours: 4.00
Starting Time: 9:00:00 AM CST
Call Status: OPEN
Completion Date: [Link]
Resolution: [Link]
PENDING CUSTOMER APPROV. PROPOSAL APPROVED
PARTS STATUS: [Link]
TRACKING NUMBER: [Link]
BILLING STATUS: [Link]

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Customer Portal Options in lieu of WO Mgmt. Platforms



Service Calls [View Record 230511-0007](#)

[Back](#)

Service Call ID: 230511-0007
 Location: Beckwith Electric Company
 Date: 05/16/2023
 Description: ANNUAL MAY MAINTENANCE
 Call Type: GENERATED MC
 Status: COMPLETE
 PO: 4506078511
 Completed Date: 05/26/2023

Appt No.	Technician	Appt. Date	Appt. Status	Estimated Hours	Completion Date
0001	RATKINSON	05/16/2023	COMPLETE	6.00	05/16/2023
0002	RATKINSON	05/17/2023	COMPLETE	2.00	05/18/2023
0003	RATKINSON	05/18/2023	COMPLETE	8.00	05/18/2023
0004	RATKINSON	05/23/2023	COMPLETE	2.00	05/26/2023

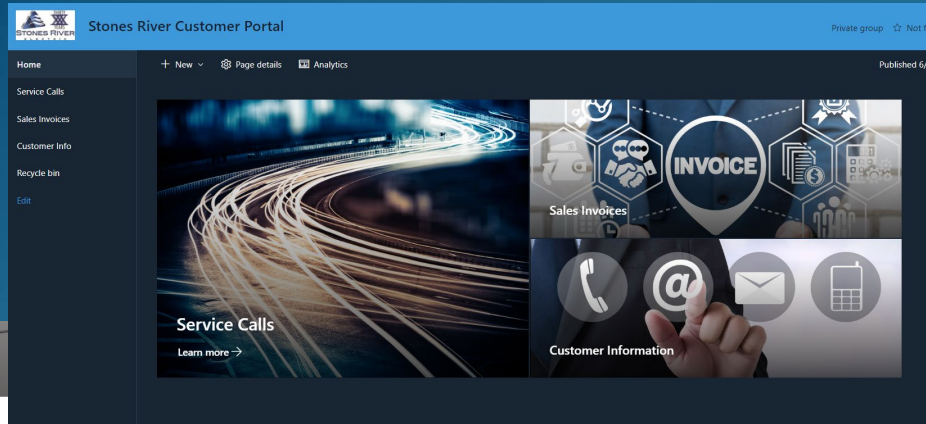
Service Calls [View Record 230511-0007](#)

[Back](#)

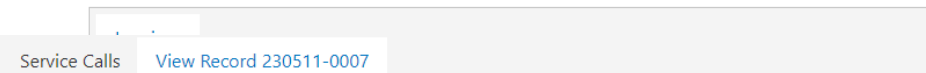
Service Call ID: 230511-0007
 Location: Beckwith Electric Company
 Date: 05/16/2023
 Description: ANNUAL MAY MAINTENANCE
 Call Type: GENERATED MC
 Status: COMPLETE
 PO: 4506078511
 Completed Date: 05/26/2023

Appt No.	Technician	Appt. Date	Appt. Status	Estimated Hours	Completion Date
0001	RATKINSON	05/16/2023	COMPLETE	6.00	05/16/2023

Customer Portal Options in lieu of existing Work Order Management Platforms



Service Call ID	Location	Date	Description
230511-0007	Beckwith Electric Company	05/16/2023	ANNUAL MAY MAINTENANCE



[Back](#)

Service Call ID: 230511-0007
 Location: Beckwith Electric Company
 Date: 05/16/2023
 Description: ANNUAL MAY MAINTENANCE
 Call Type: GENERATED MC
 Status: COMPLETE
 PO: 4506078511
 Completed Date: 05/26/2023

Appt No.	Technician	Appt. Date	Appt. Status	Estimated Hours	Completion Date
0001	RATKINSON	05/16/2023	COMPLETE	6.00	05/16/2023
0002	RATKINSON	05/17/2023	COMPLETE	2.00	05/18/2023
0003	RATKINSON	05/18/2023	COMPLETE	8.00	05/18/2023
0004	RATKINSON	05/23/2023	COMPLETE	2.00	05/26/2023

No.	Technician	Appt. Date	Appt. Status
7	RATKINSON	05/16/2023	COM

Call ID: 230511-0007
 Location: Beckwith Electric Company
 Date: 05/16/2023
 Description: ANNUAL MAY MAINTENANCE
 Call Type: GENERATED MC
 Status: COMPLETE
 PO: 4506078511
 Date: 05/26/2023

Customer Portal Integration offers many other integration applications. The building Optimization Broker is just one option shown below.

IoT Hub Tim Cramer

Your Company > ERP Agents > Signature ERP

ERP Agent Information

Serial Number: 003e965-3126-4c1a-9c9b-5204e17b3d1
Connection Status: Connected
Worker Status: InventoryUploadSucceeded
Software Version: 1.0.0.0 - Dev
ERP Driver: Not Available
ERP Database(s): TWO
Latest ERP Sync: Not Available

ERP Agent Actions

- Configure ERP Agent
- Sync ERP Data to BOB
- Rename ERP Agent
- Rotate Agent Credentials
- Delete ERP Agent

CUSTOMERS **TECHNICIANS** **SERVICE STATUSES**

Filter Table Start Tracking Stop Tracking

CUSTOMER ID	NAME	ADDRESS	TRACKED
> <input type="checkbox"/> 2fb23070-b7e0-540b-afb0-d80ba70a0a1d	FABRIKAM	34556 West Wood Ave New Baine, WI 56389 United States	<input type="checkbox"/>
> <input type="checkbox"/> aa636d9a-5157-5c0f-88be-856acdb3841	YELLOW & SONS	110 S Chance Ave Renneville, WI 54321 United States	<input type="checkbox"/>
> <input type="checkbox"/> af1b024e-e651-53ab-98ce-e9f0d3162066	OIL MECHANICAL	N23388 Umberly Road Chioley, WI 53245 United States	<input type="checkbox"/>
> <input type="checkbox"/> b37fa53b-f744-5fa4-od1e-9a31c6d38f3	GRAPH TOP, INC	90 LevelBark Blvd Match City, WI 53788 United States	<input type="checkbox"/>

Reporting Dante Gabrieli

Back to Home Page Open Bookmarked Report Bookmark Report

Equipment Report

Equipment Name	Average Score
Equipment 01	72
Equipment 02	72
Equipment 03	72
Equipment 04	72
Equipment 05	72
Equipment 06	72
Equipment 07	72

Service Management Tim Cramer

Sort By: Creation Date Start Time: 2020-05-19 12:00 AM End Time: 2020-05-26 11:59 PM Filters Clear Filters

Today Yesterday 05-21-2020

- Fan Offline** Requested 11:47:04 PM
- Failed Return Air Sensor** Requested 01:41:50 PM
- Intermittent Temperature Issues** Requested 04:39:03 PM

WO-247 | Acceptance Testing, Acceptance Testing Site: VAV_01_01

Fan Offline

DESCRIPTION: Customer reports VAV fan does not run when called for heating.

CREATED ON: 05-20-2021 11:47:04 PM LAST UPDATE: 05-20-2021 11:48:01 PM
REQUEST SOURCE: M MANAGED BY: BOB

APPOINTMENTS

APPOINTMENT	DATE/TIME	TECHNICIAN	STATUS
Initial diagnostic	2020-05-20 12:00AM	Desmond London	Completed
Replace part	2020-05-21 2:00PM	Desmond London	In progress
Verify fix	2020-05-22 1:00PM	Desmond London	Scheduled

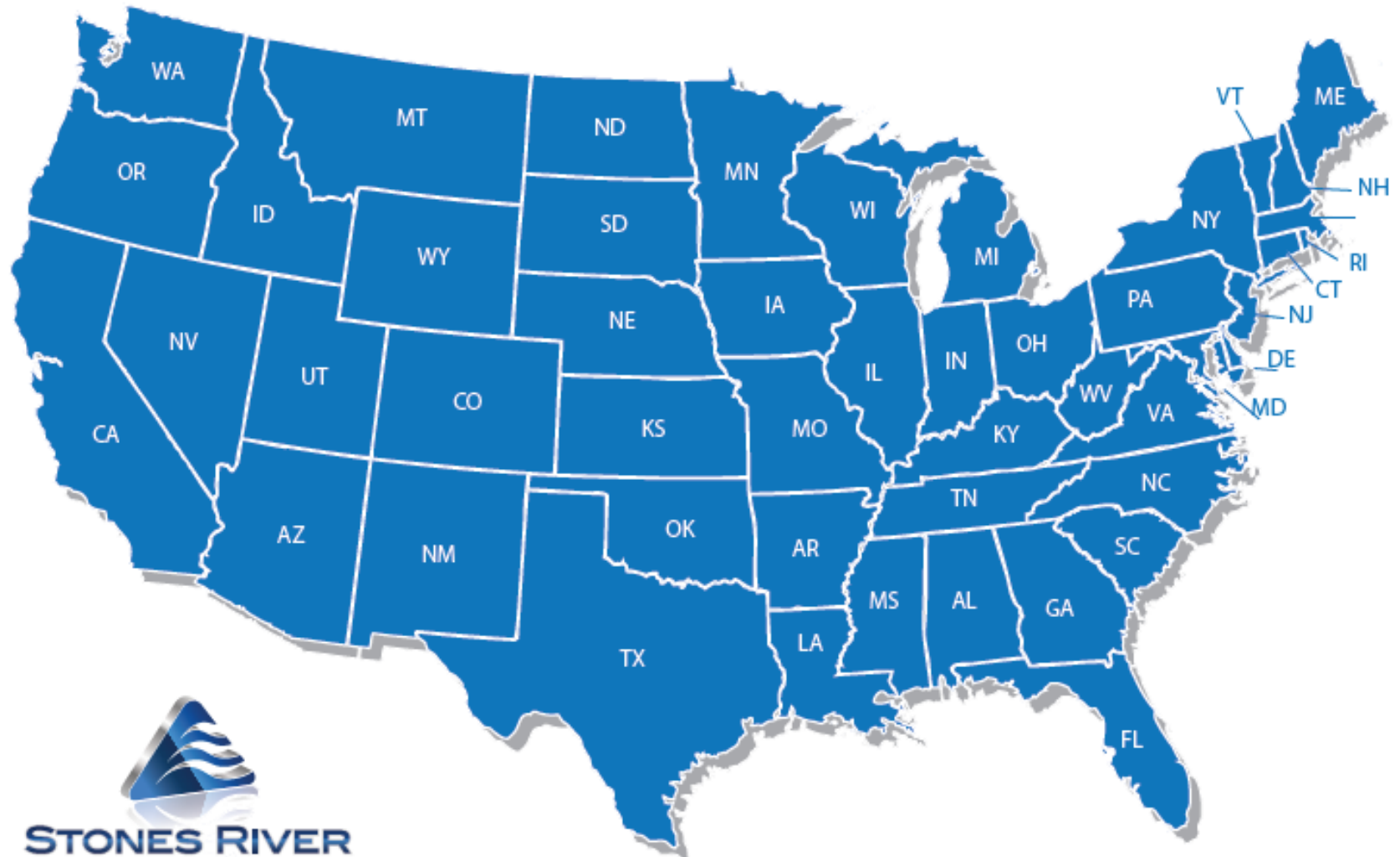
CALL INFORMATION: CALL STATUS: Requested, PRIORITY: High, CLIENT: Your Client, SITE: Your Client's Site, EQUIPMENT/SYSTEM: VAV_01_01, AREA: Default Area, CLIENT CONTACT: Pablo Davis, REQUESTOR INFO: Pablo Davis, +1865364310, pdavis@stonesriver.com

Cancel Save Save & Notify

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Stones River Electric Projects and National Account Rollout Self-Perform Coverage Map



STONES RIVER
ELECTRIC

WBENC Certification

WBENC | Women's Business Enterprise
National Council

hereby grants

National Women's Business Enterprise Certification

to

TLC INVESTMENTS, LLC DBA STONES RIVER ELECTRIC

who has successfully met WBENC's standards as a Women's Business Enterprise (WBE).
This certification affirms the business is woman-owned, operated and controlled; and is valid through the date herein.

Certification Granted: January 8, 2008

Expiration Date: January 31, 2019

WBENC National Certification Number: 2005109761

WBENC National WBE Certification was processed and validated by
Women's Business Enterprise Council - South, a WBENC Regional Partner
Organization.



Authorized by Phala Mire, President
Women's Business Enterprise Council - South



NAICS: 237130, 238210, 541350, 541490, 541690, 561790
UNSPSC: 39111821, 45121614



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