SRE Asset Management Services

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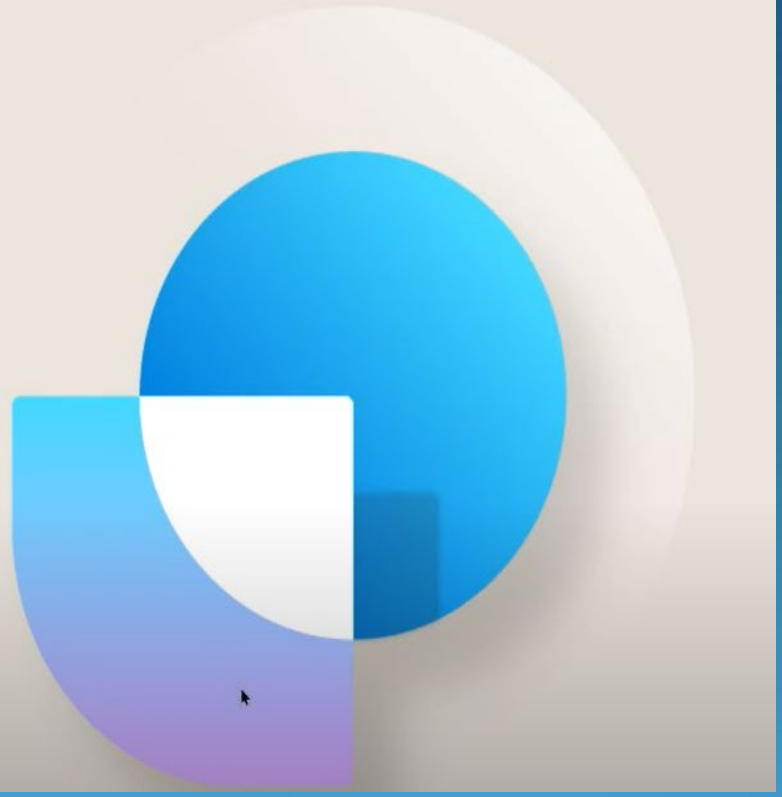
Microsoft Dynamics 365

Asset Management Overview in Dynamics 365 Supply Chain Management



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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.

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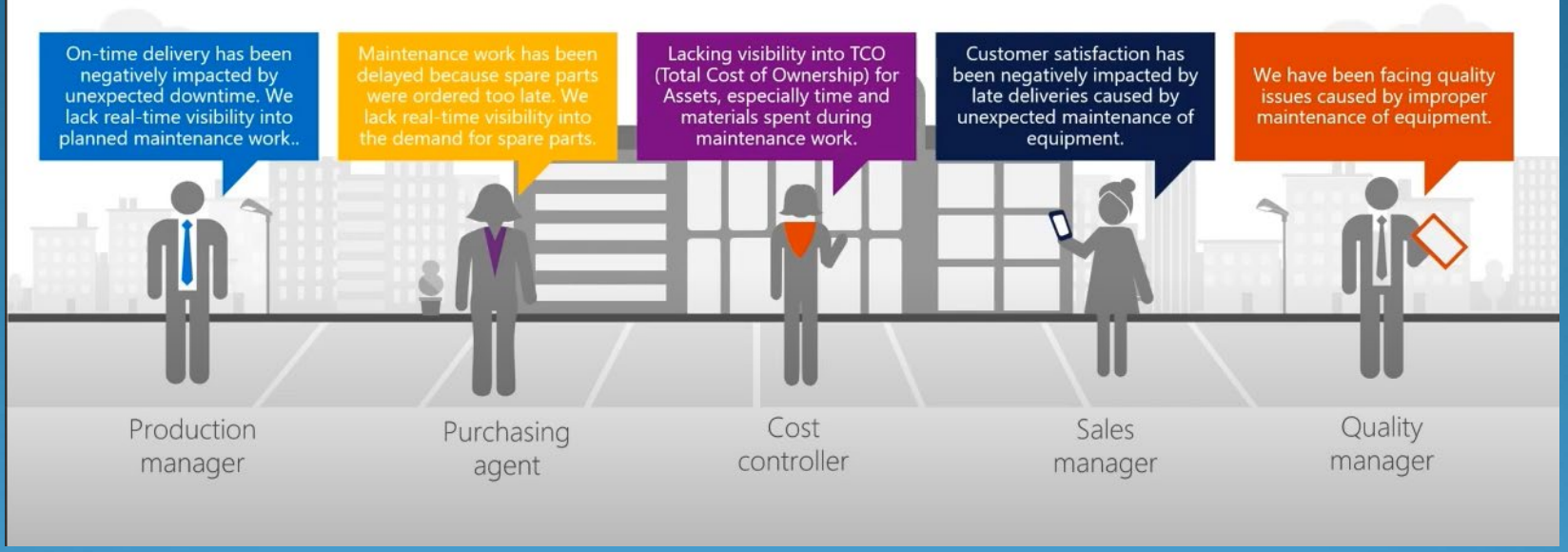
Lacking visibility into maintenance activities impacts everybody

Technology provides solutions to existing and emerging problems



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Benefits of asset management

Reduce asset maintenance costs

Improve equipment uptime and lifespan

Increase operational efficiency

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Asset management scenarios

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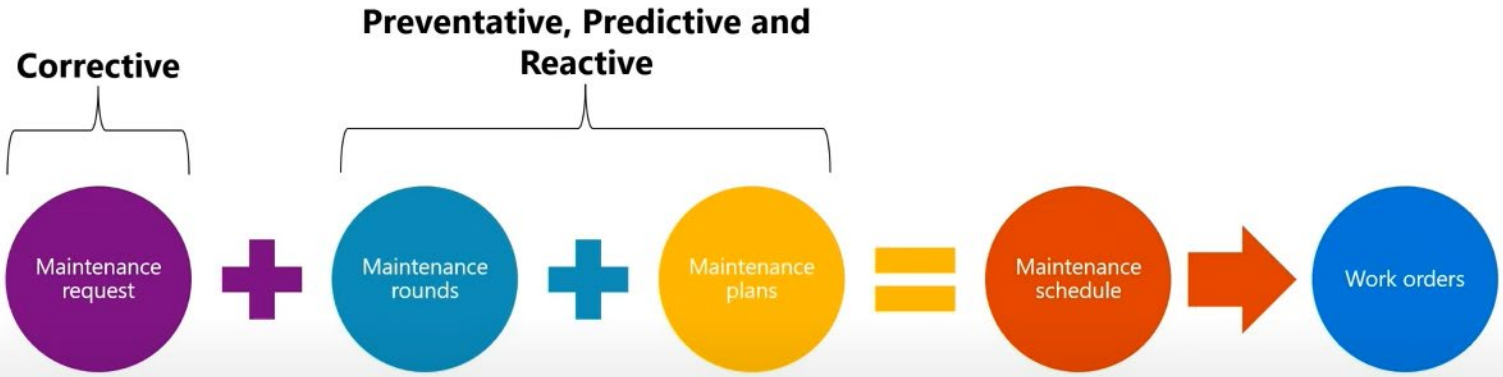
Acquire to dispose in Dynamics 365

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



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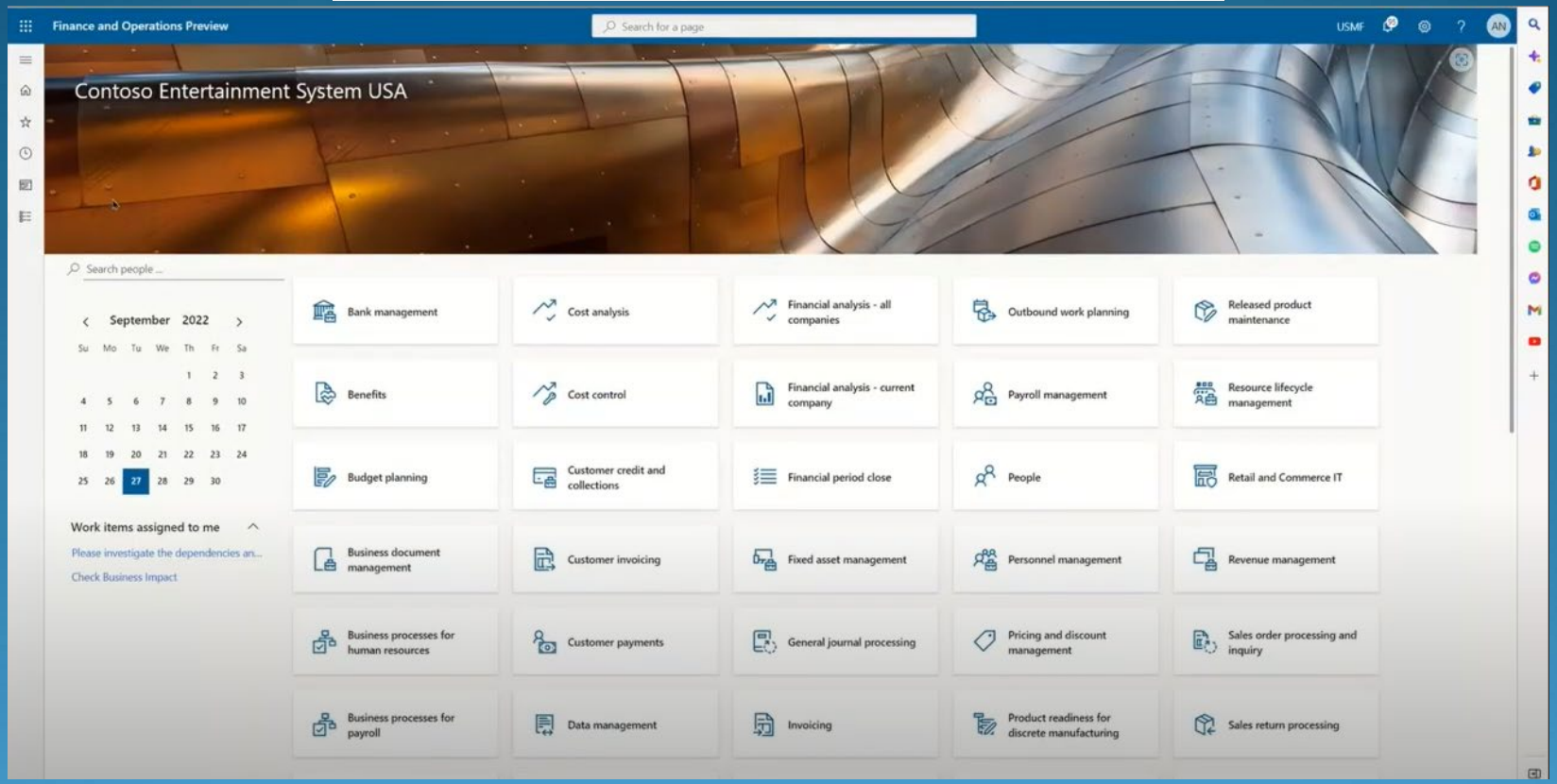
Project management and accounting integration

- 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



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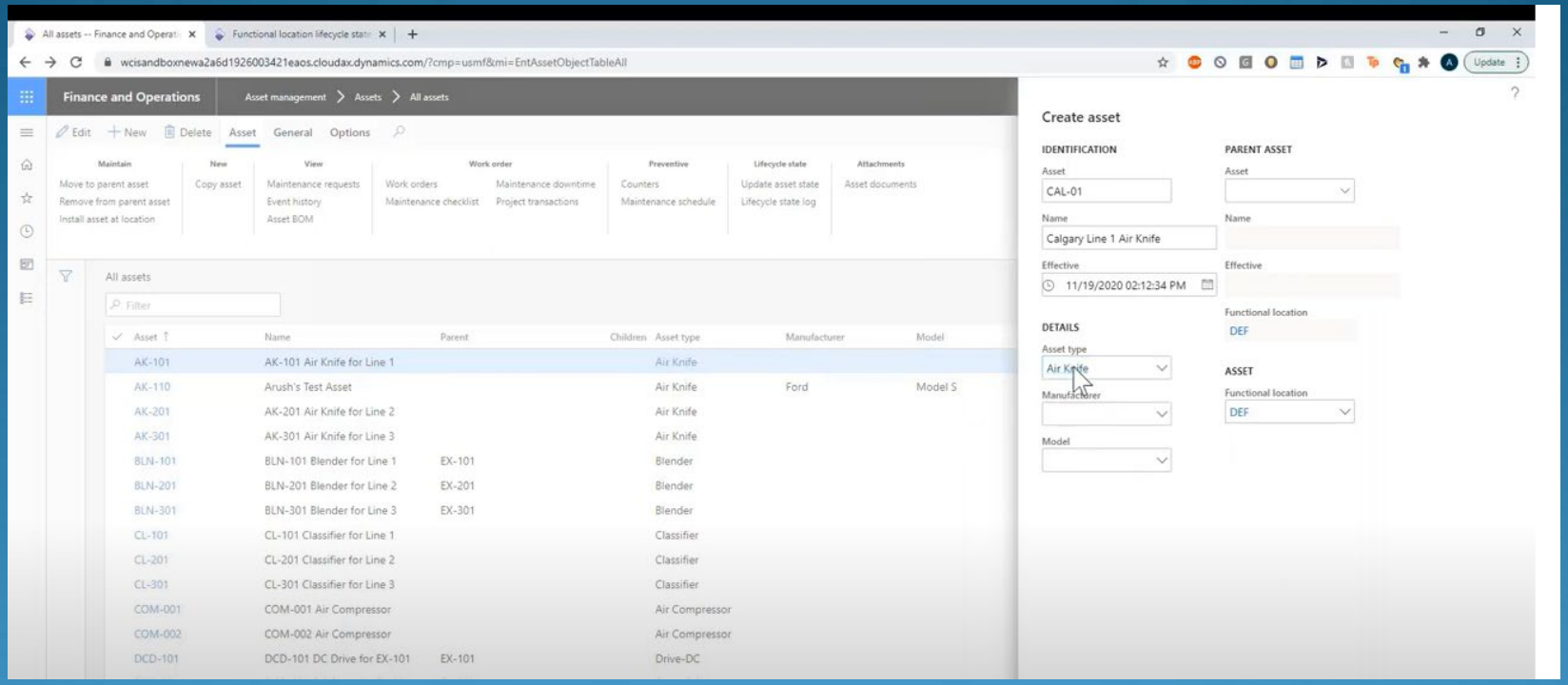
New Asset Setup



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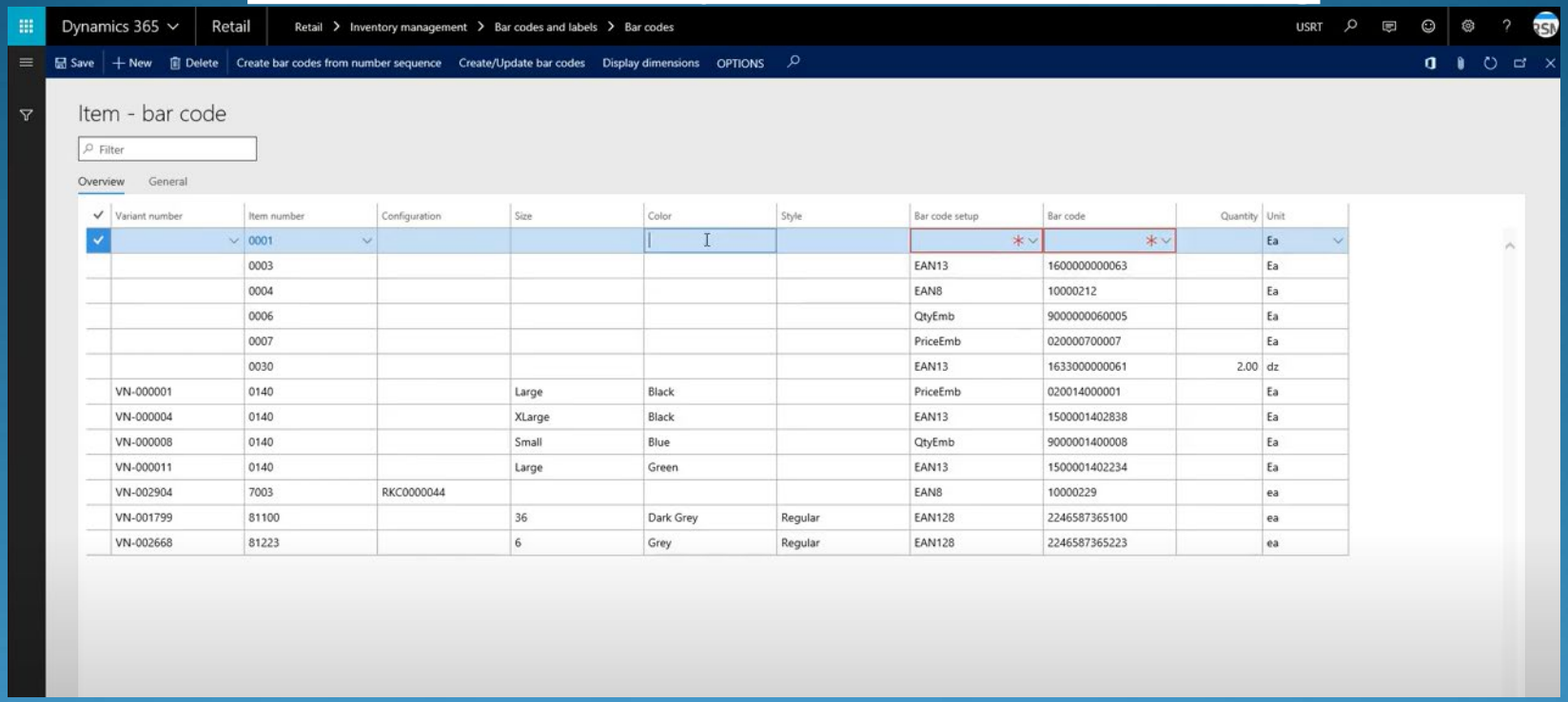
New Asset Setup - Barcode / Tracking



Variant number	Item number	Configuration	Size	Color	Style	Bar code setup	Bar code	Quantity	Unit
	0001								Ea
	0003					EAN13	1600000000063		Ea
	0004					EAN8	10000212		Ea
	0006					QtyEmb	9000000060005		Ea
	0007					PriceEmb	020000700007		Ea
	0030					EAN13	1633000000061	2.00	dz
VN-000001	0140		Large	Black		PriceEmb	020014000001		Ea
VN-000004	0140		XLarge	Black		EAN13	1500001402838		Ea
VN-000008	0140		Small	Blue		QtyEmb	9000001400008		Ea
VN-000011	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

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Barcodes, RFID, BLE Beacon Tracking, Indoor Positioning

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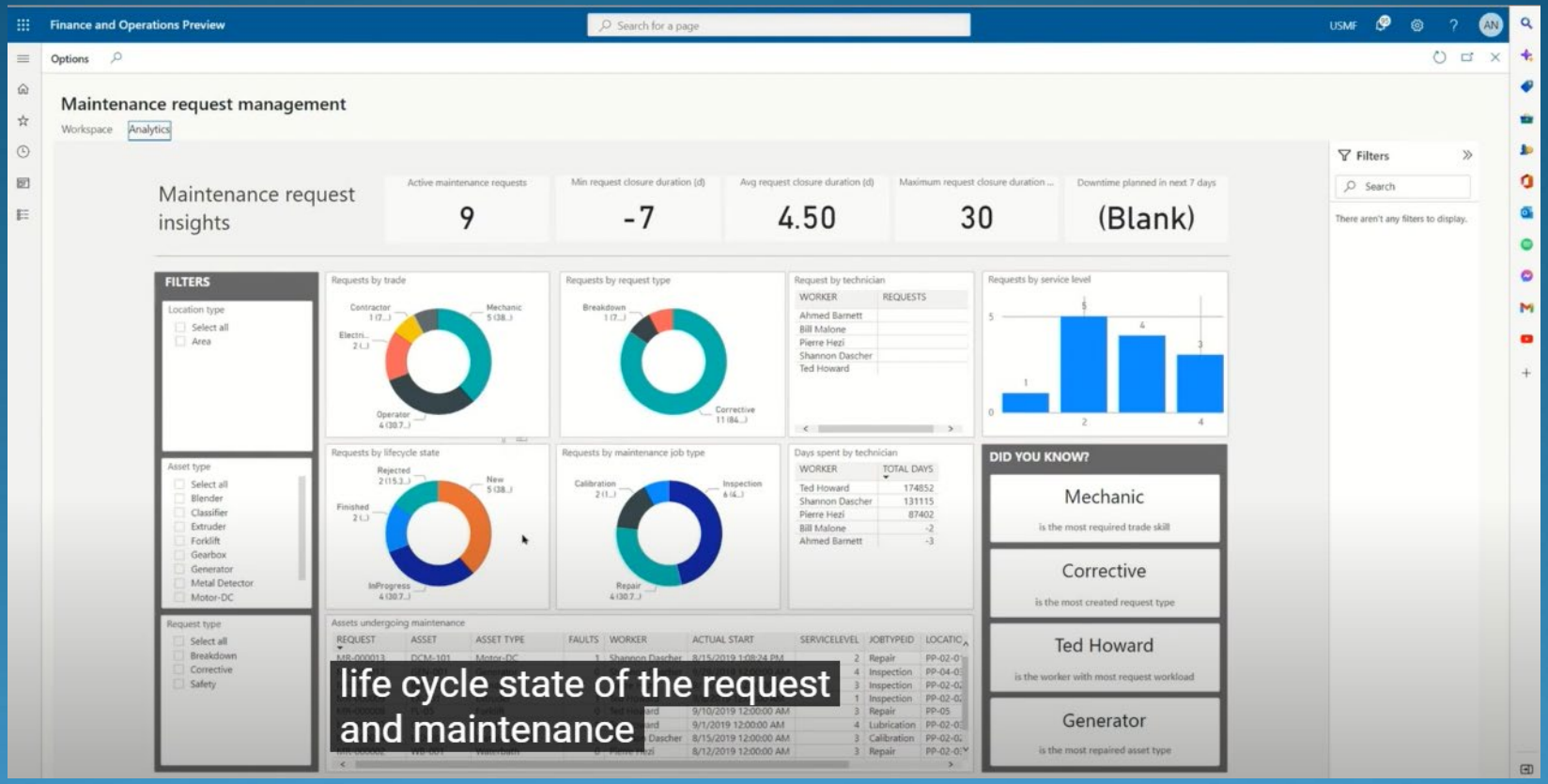

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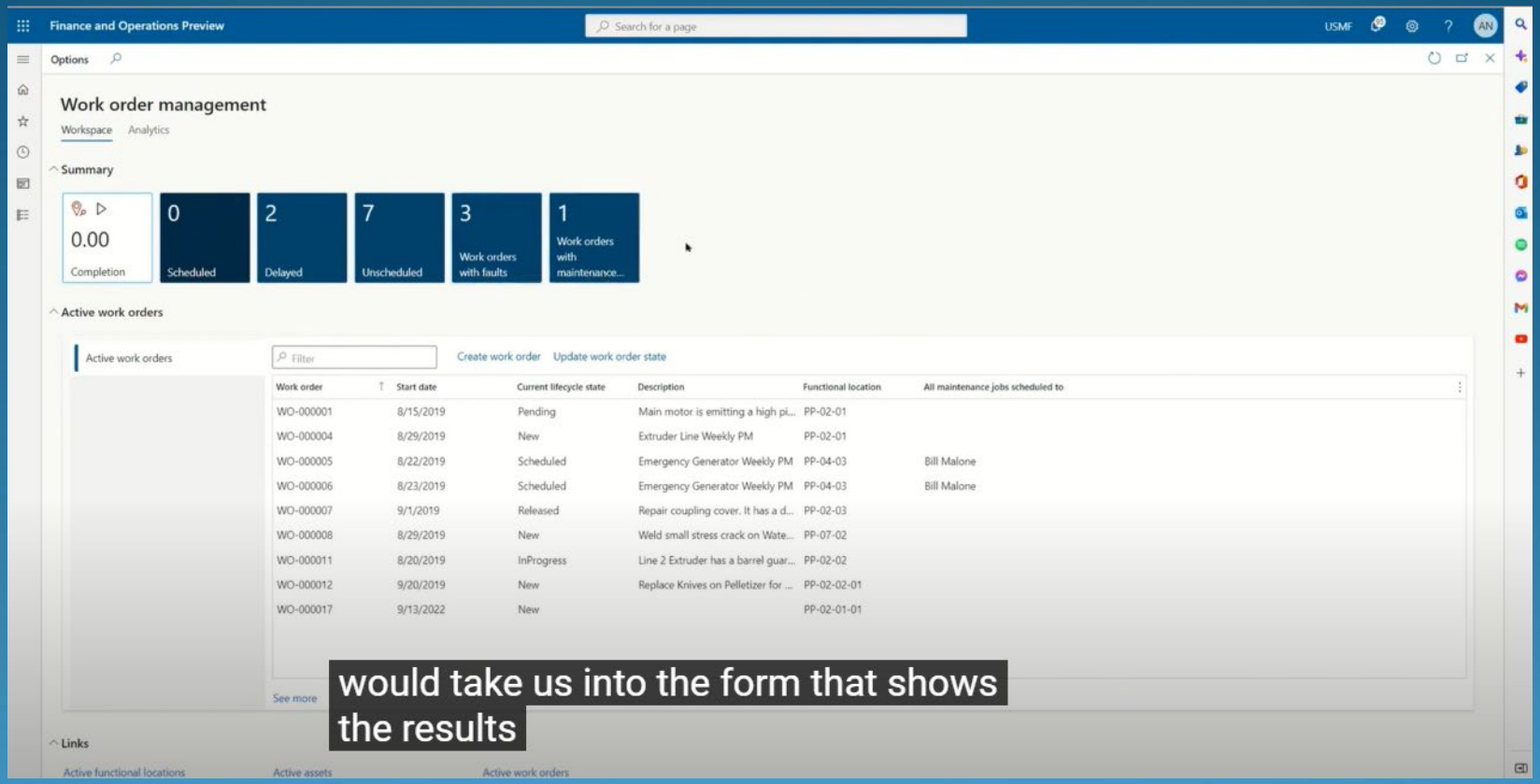

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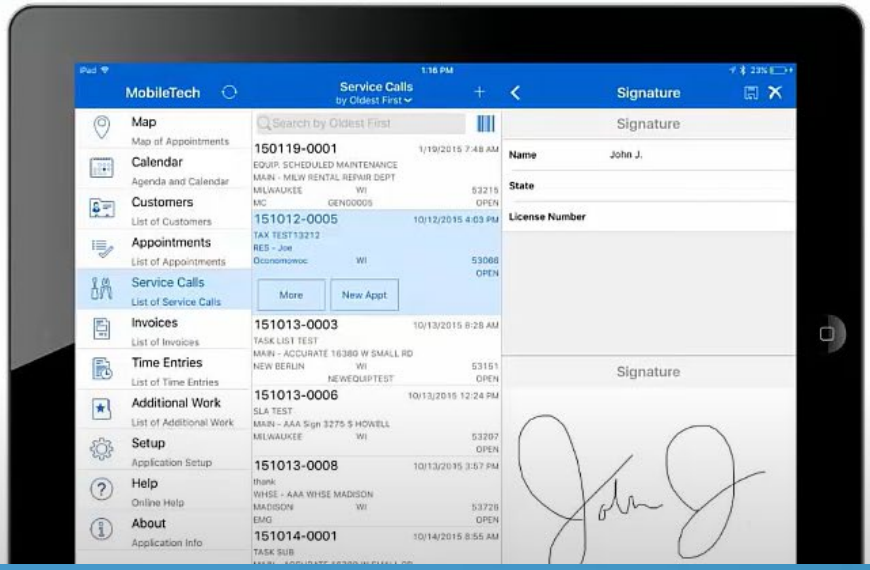
Additional resources

- 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



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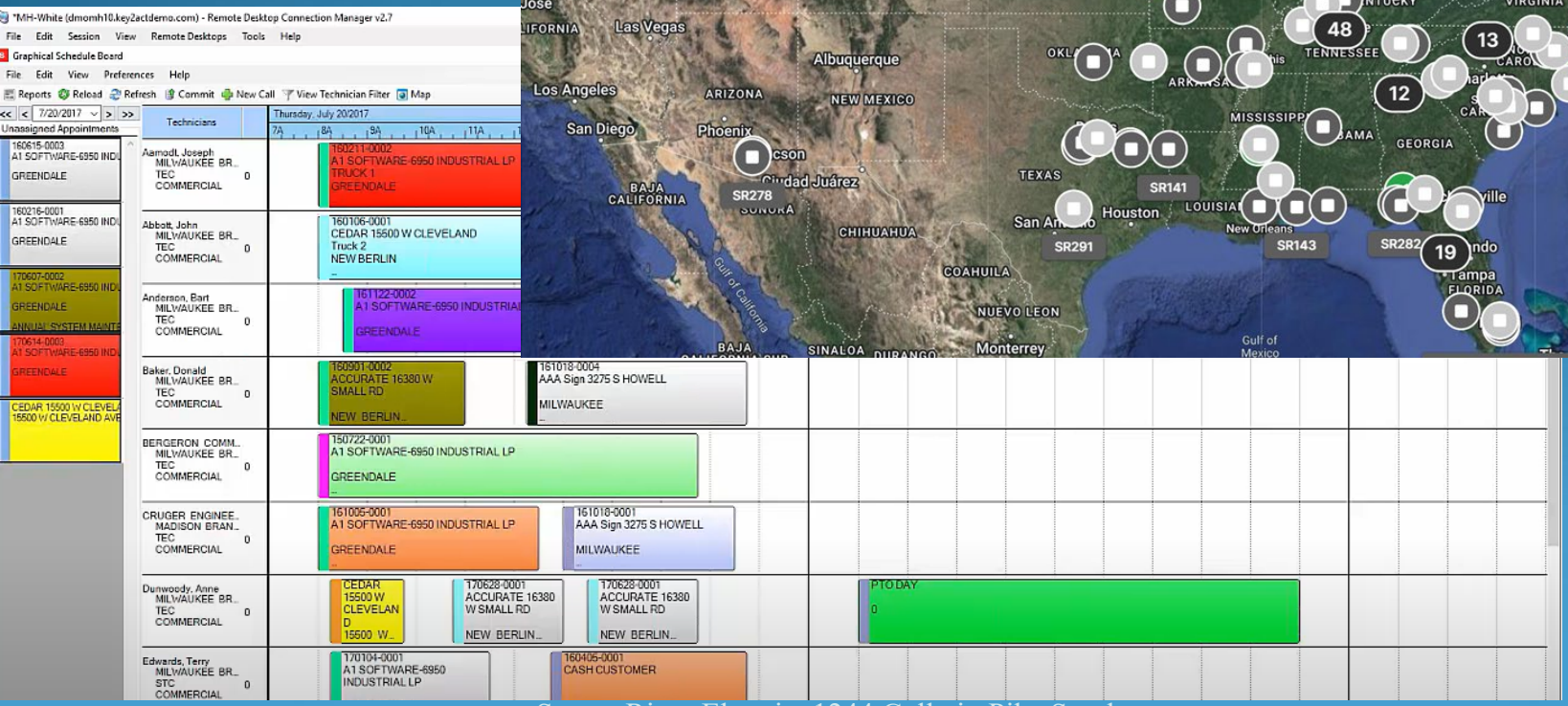
Graphic Scheduling Board and real-time GPS data provide excellent PM tools



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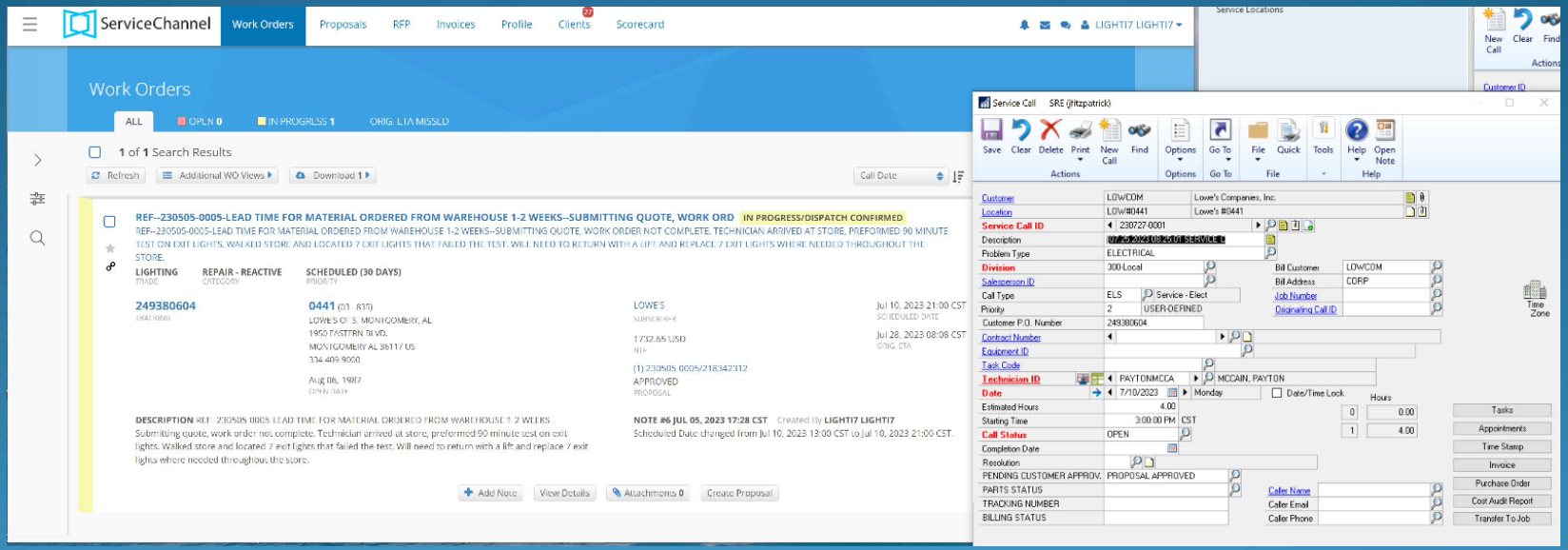
SRE is Fully Integrated with Service Channel, FM Pilot, and Fexa. As an alternative, we are also integrated with our own private Customer Portal



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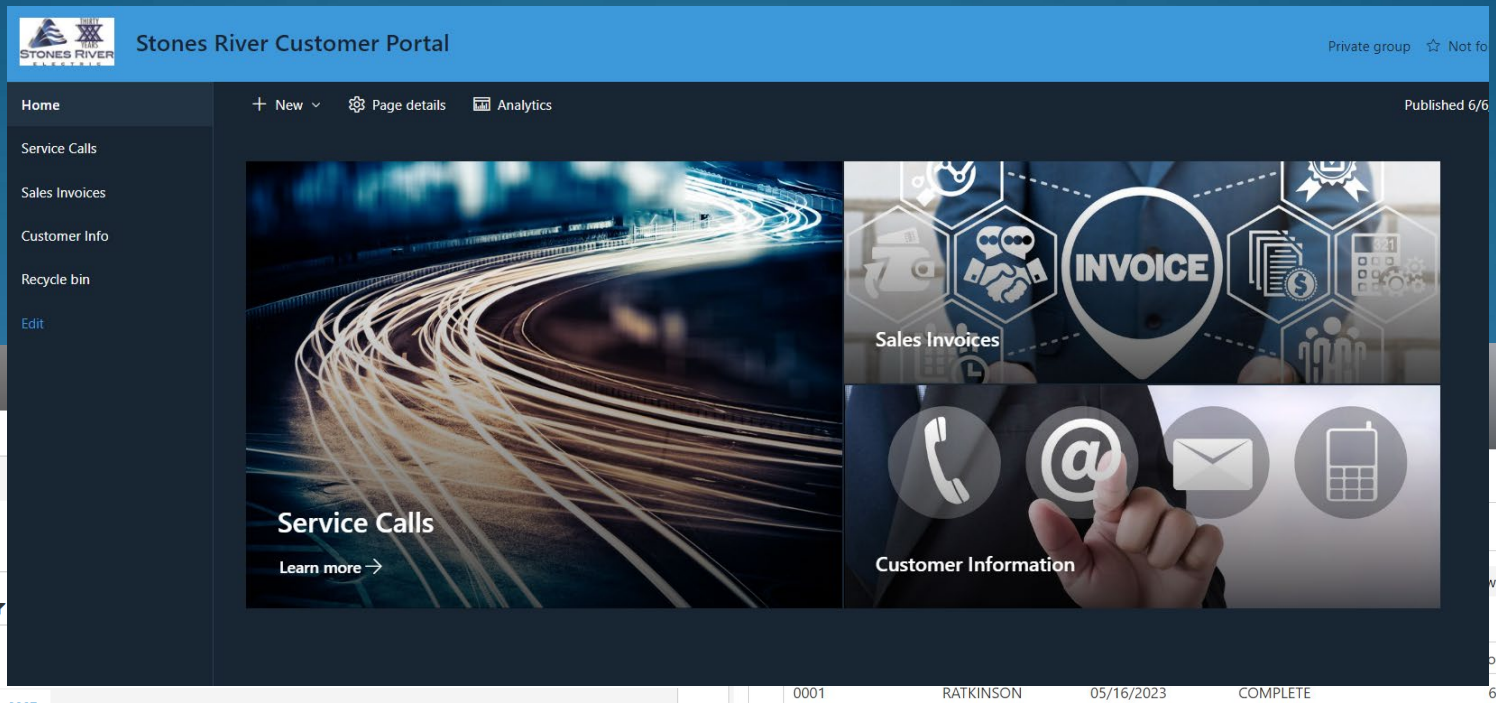
Customer Portal Options in lieu of WO Mgmt. Platforms



Invoices

Invoices

Export

Doc No

PB1409

Print

					Completion Date
0001	RATKINSON	05/16/2023	COMPLETE	6.00	05/16/2023

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
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

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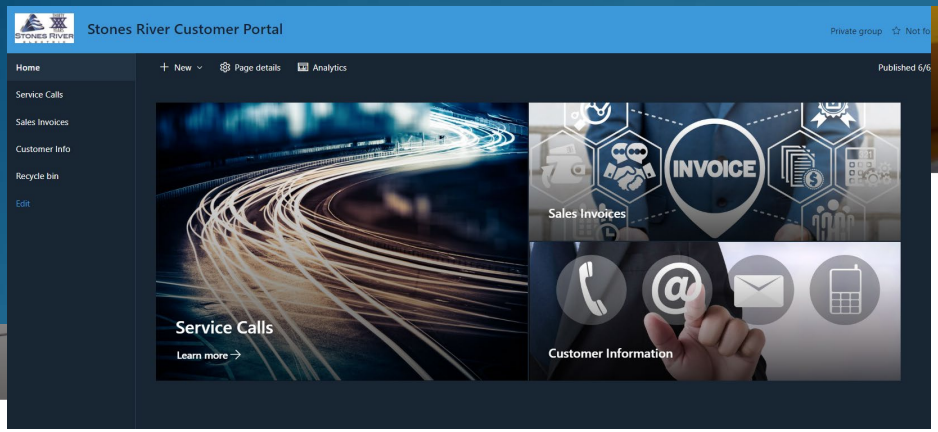
Customer Portal Options in lieu of existing Work Order Managment Platforms



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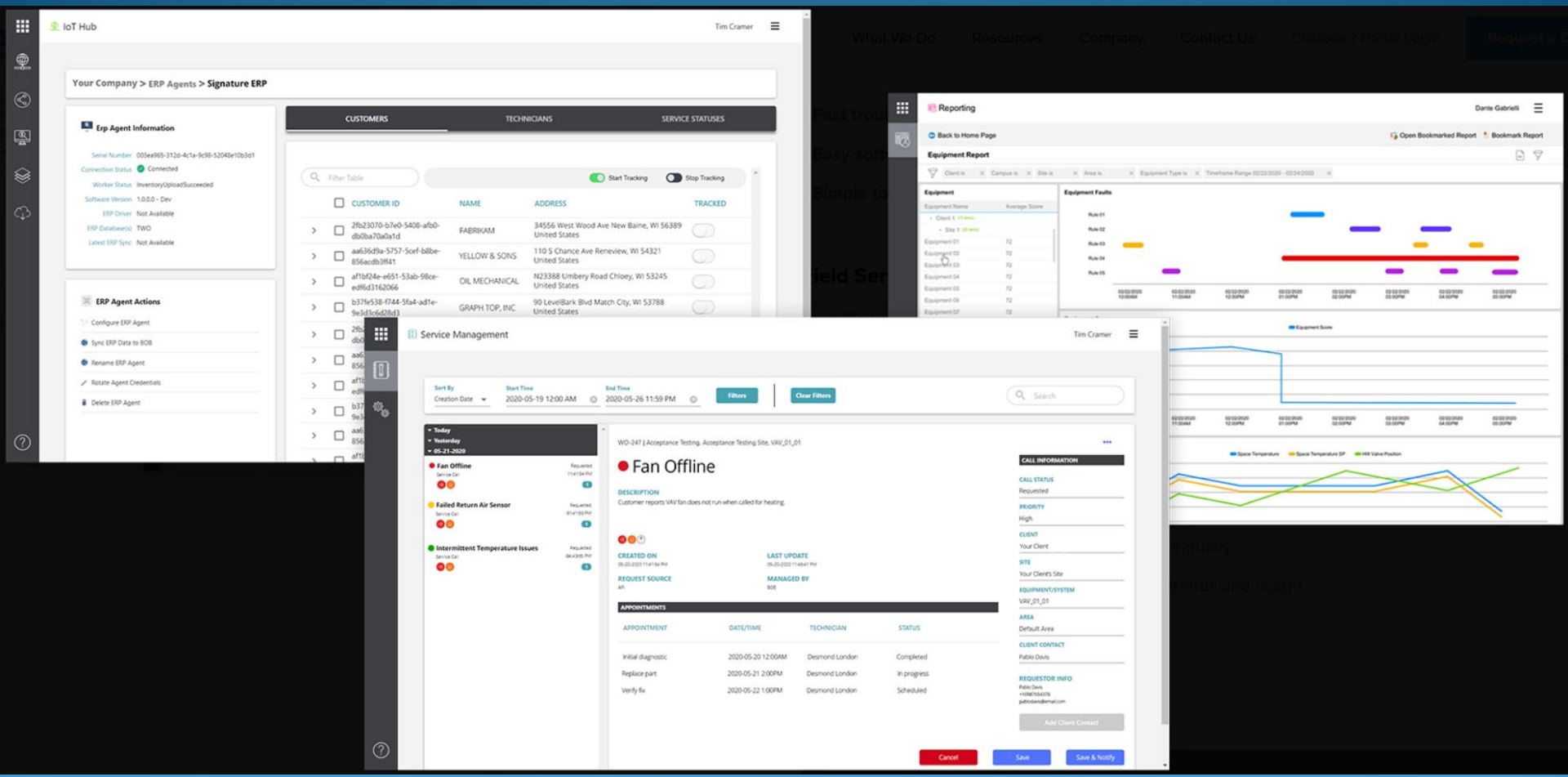
l Type	GENERATED MC
Status	COMPLETE
PO	4506078511
l Date	05/26/2023

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



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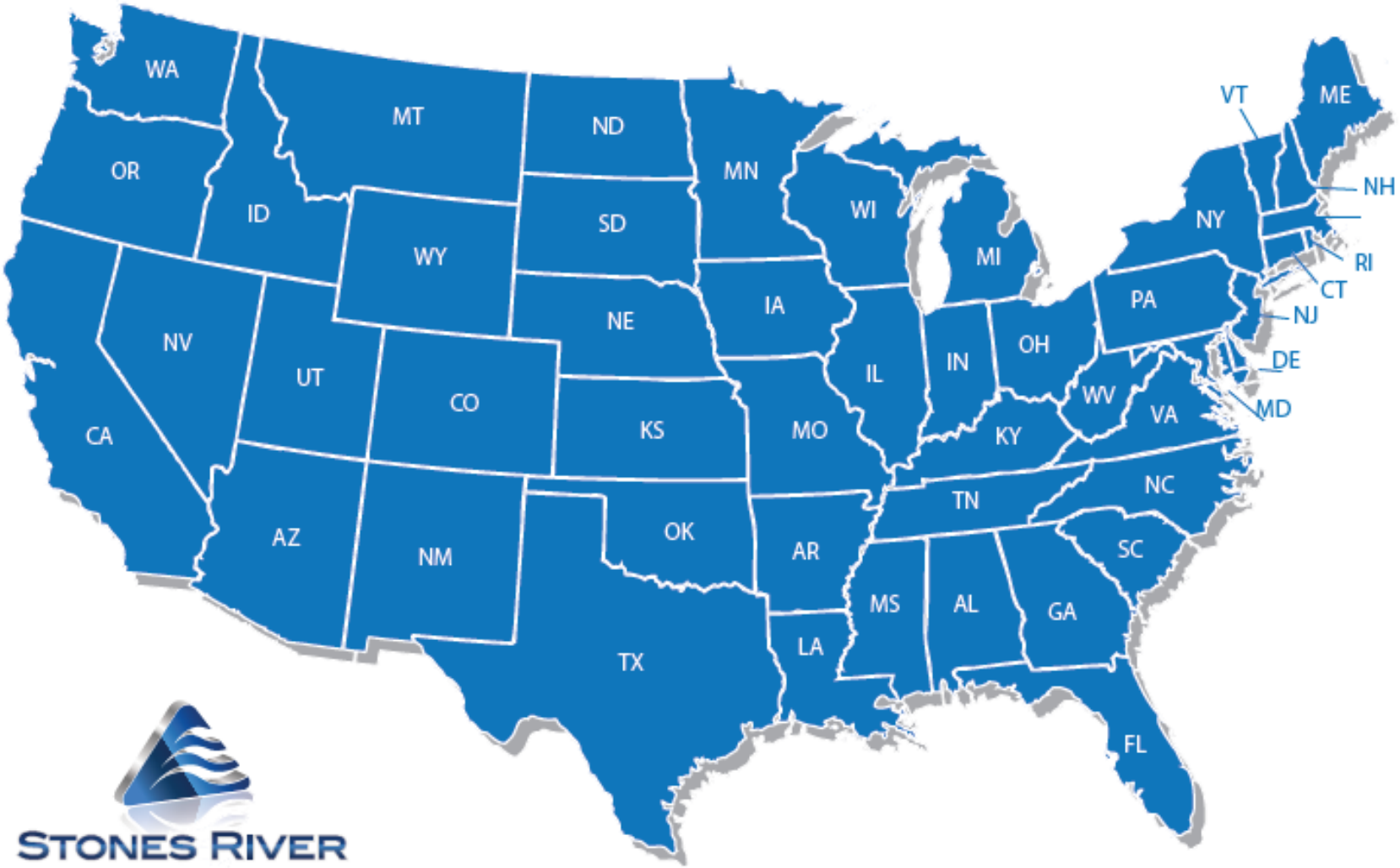
Projects and National Account Rollout Self-Perform Coverage Map



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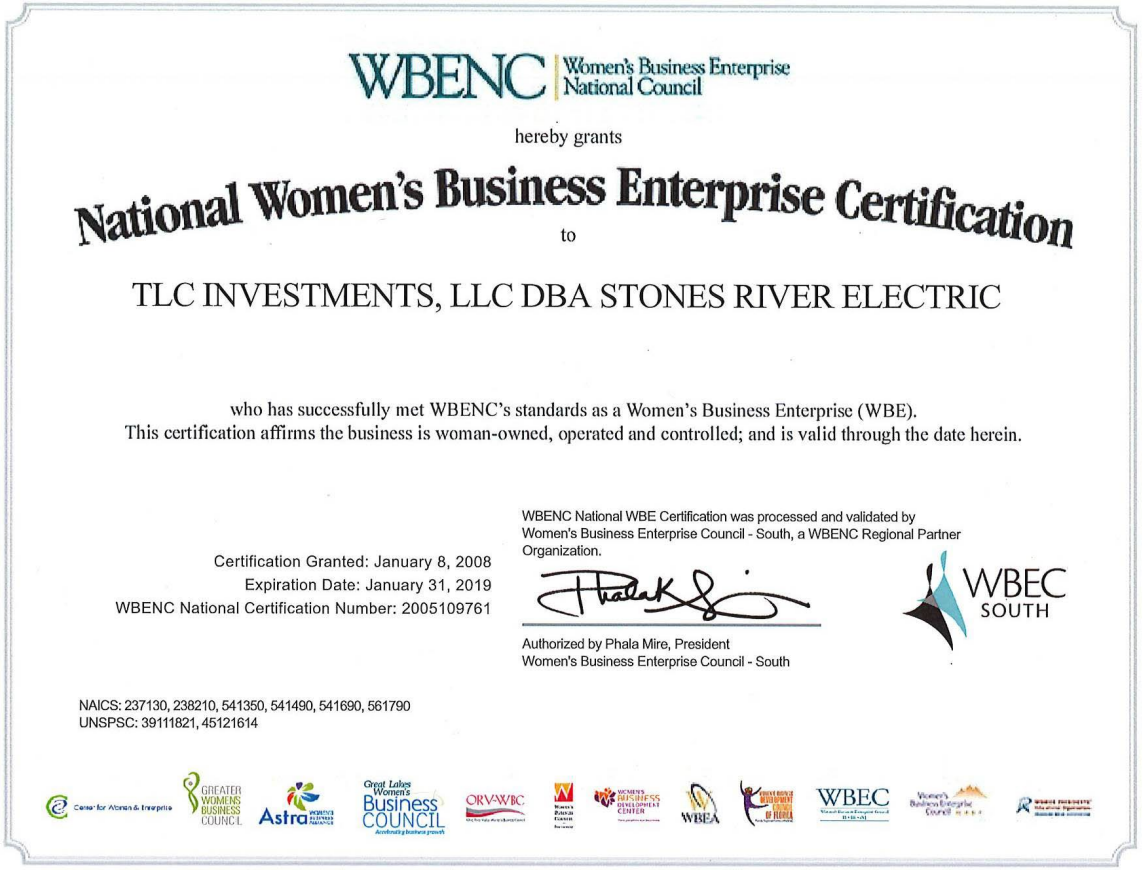
WBENC Certification



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

WBEC SOUTH

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

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