

### AUTOMATED FIELD SERVICE PROCESSES ACCELERATE CASH FLOW

#### WESTERN COMPUTER HELPS GUSTAVO PRESTON LEVERAGE MICROSOFT DYNAMICS NAV FIELD SERVICE MANAGEMENT CAPABILITIES TO REDUCE INVOICE TIME FROM DAYS TO HOURS

The Gustavo Preston Company has provided engineered fluid-handling equipment solutions to Boston and the New England area for more than 130 years. As one of the nation's oldest commercial pump repair and sales agencies, the company continues to grow and develop by expanding facilities and adding a global support network.

As Gustavo Preston began to grow rapidly in recent years, the company deployed Microsoft Dynamics NAV to improve its overall ERP capabilities and to streamline business workflows. They realized that the long-term success of the ERP deployment might depend on finding the right IT solution provider to help with the deployment and ongoing support. After relationships with two IT service firms failed to meet expectations, Gustavo Preston set out to identify a partner with expertise not only in Dynamics NAV, but in manufacturing and field service operations, as well.

### NEED TO AUTOMATE FIELD SERVICES DRIVES SEARCH FOR NEW DYNAMICS NAV PARTNER

Finding a Dynamics NAV partner with manufacturing industry experience became a high priority when Gustavo Preston identified the efficiency that could be gained by automating its field service operations. Previously, field technicians were required to drive to the company's Boston office to pick up new work orders and submit completed service tickets. With technicians covering the entire New England area, this created a lot of extra driving and reduced the amount of time spent working on customer systems.

"We wanted to provide our technicians with mobile devices to not only automate the process for receiving and submitting work orders, but to automate scheduling," explains Randy Peterman, a Project Manager with Gustavo Preston. "We needed to know which technicians were available at all times so we could quickly respond to customer emergencies and provide accurate arrival-time estimates."

The first step taken by Gustavo Preston was the hiring of Jon Kleist as an internal database administrator and Dynamics NAV developer. Kleist came on board with vast experience in implementing and supporting Dynamics NAV deployments.

"But we also recognized that an IT partner with Dynamics NAV and manufacturing experience would be necessary for us to succeed," Kleist points out. "There are times when help from someone who has been through similar challenges can be valuable—we wanted guidance on best practices, so we could realize the full value that Dynamics NAV offers."



### PROJECT GOALS



Identify a strategic IT partner to provide the necessary support for Microsoft Dynamics NAV



Automate service ticket processing to reduce time spent by field technicians



Improve field technician scheduling to better meet emergency repair and preventative maintenance needs

**"Western Computer gives us the flexibility to do what we can but to call on them when we need help, and we always receive help right away. They are respectful of where we want to take ownership and adjust to whatever level of support we need."**

Randy Peterman  
Project Manager  
Gustavo Preston

# GUSTAVO PRESTON

## CASE STUDY



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### DEEP EXPERTISE AND IMMEDIATE RESPONSE TIMES POINT TO WESTERN COMPUTER

After meeting potential Dynamics NAV partners at a Microsoft conference, Gustavo Preston narrowed the choice to three solution providers and began checking references. Kleist and Peterman chose Western Computer based on strong references and Western Computer's ability to provide deep expertise across ERP and CRM applications, as well as manufacturing business processes.

"With the support structure Western Computer offers, we don't have to worry about one person learning our system and then not being available when we need them," Peterman says. "They thoroughly assessed and documented our system so that multiple people can help us."

"Whenever we need more tables, licenses, or help with complex functions, Western Computer responds right away," Kleist adds. "We can also easily escalate a support incident if necessary, with multiple ways to contact our support team."

### SERVICE MANAGEMENT EXPERTISE IDENTIFIES SOLUTIONS TO DEPLOY

For Gustavo Preston, it is particularly important that Western Computer offers in-depth expertise for the Dynamics NAV Service Management Module. The company had wanted to improve the field service system for a long time, and with Western Computer on the scene, it was the perfect time to launch the effort.

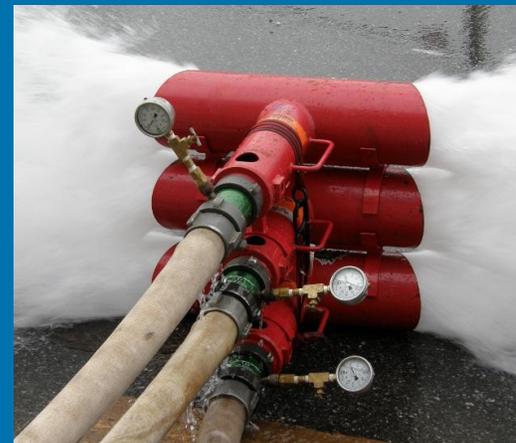
In addition to the Dynamics NAV Service Management Module, Kleist and Peterman had evaluated additional software solutions to enhance field service operations. But based on past experience, Western Computer recommended two different solutions that would integrate more easily with the central ERP deployment. On Western's recommendation, Gustavo Preston selected MobileNAV to power technicians' mobile devices and PlannerOne to optimize scheduling functions.

"These recommendations demonstrate how the experience of Western Computer really paid off for us," Kleist says. "They had experts on staff who had consulted on other successful deployments. After conducting product demos, we realized these solutions functioned better than the software we had considered previously."

MobileNAV runs on Lenovo laptops (Windows OS) and Samsung phones (Android OS) used by the field technicians, who all found the solution very easy to learn. "MobileNAV is very intuitive, flexible and customizable," Kleist says. "Western Computer showed us how to simplify the interface by tuning the software so it shows only the functions the techs need to see at each point of the service process."

PlannerOne has led to major improvements in the way Gustavo Preston manages field resources. After Western Computer provided initial instruction, they connected Peterman with PlannerOne resources when more help was needed in utilizing advanced functions.

"This is a great example of the practical, teamwork-based approach Western Computer applies in supporting customers," Peterman says. "We take things as far as we are comfortable with and then ask Western Computer to step in when we need help. They recognize when another level of expertise is required and do not hesitate to connect us with a third party—while monitoring the situation to make sure everything works out."



### PROJECT HIGHLIGHTS

- Internal resources have experts they can turn to for Dynamics NAV best practices and configuration changes.
- Field technicians no longer have to travel to the home office to pick up work orders.
- Back-office personnel have eliminated nearly three hours per day of reconciling field technician reports and scheduling issues.

**"Western Computer impressed us with their reliability and trustworthiness. We appreciate a partner that provides local resources, which prevent time zone and general communications from being barriers to effective collaboration."**

Jon Kleist  
Database Administrator  
Gustavo Preston

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### REDUCED ADMINISTRATIVE TIME IN THE FIELD AND AT THE OFFICE

Since collaborating with Western Computer to deploy MobileNAV and PlannerOne, Gustavo Preston has reduced the administrative burden for each of the company's 11 field technicians by 30 minutes per day--a total savings of more than 25 hours per week. Because forms are prepopulated with information from Dynamics NAV, the technicians no longer have to fill out forms manually when submitting information on service calls, and they receive information about new service calls on their mobile devices, rather than returning to the office after each call.

"In addition to reducing our payroll costs, this allows our techs to complete more service calls per day and arrive at customer sites sooner," Kleist says. "They are also less likely to make mistakes on data input—such as quantities of items used on each job—since they can quickly identify what they used rather than typing it all in. They just check things off, and we know what parts will be returned to the office."

The checklists within MobileNAV and the Dynamics NAV Service Management Module play a big role in how smoothly the field technicians can document the work they perform. "Western helped us with the checklists so that we spend less time getting information back from technicians to close out tickets and invoice customers," Peterman says. "This saves one of our internal resources about 45 minutes per day making sure technicians submit all their work."

### ACCELERATED CASH FLOW

The new service management solution also reduces the amount of time for reconciling work orders. The internal costs of each work order are compiled automatically, which helps ensure invoices are correct, and Dynamics NAV determines the cost of parts installed, updates the parts inventory, and calculates hours worked. "This saves our internal resource about one or two hours per day in reconciling orders," Kleist says.

The PlannerOne reports provide greater visibility into how Gustavo Preston can improve the scheduling process. "We discovered that the way we sometimes rescheduled work orders and assignments was impacting our preventative maintenance visits," Peterman says "We have since shifted job responsibilities so we can be more efficient in making sure preventative maintenance is completed when needed. We can also see in real time who is available and where they are located as we set schedules to make sure we don't double-book technicians."

For Kleist and Peterman, perhaps the biggest win on this project came from the compliment offered by the Gustavo Preston Chief Operating Officer. "He let us know that he particularly appreciates that we reduced the time to invoice service calls from as many as five days after each visit to as fast as two hours from the time each job is completed," Peterman says. "We now invoice the same day or the next day, which speeds up cash flow and helps the company operate more profitably."

### ABOUT GUSTAVO PRESTON

Founded in 1881, Gustavo Preston Company is one of the nation's oldest commercial pump repair and sales agencies. The company provides engineered fluid-handling equipment solutions supported by outstanding technical sales, service, and support to customers in industrial, commercial, and municipal markets throughout Boston and the greater New England area.



### PROJECT RESULTS

- Technicians spend more time in the field on customer calls
- Internal resources spend less time reconciling work orders, inventory, and hours
- Faster invoicing accelerates cash flow

"The service management solution generates higher-quality reports on the results of status calls, and we can more easily track training hours to know when technicians are ready to take on new tasks."

Jon Kleist  
Database Administrator  
Gustavo Preston



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