



Instead of multiple apps, Civtec chose Resco's all-in-one solution Field Service 2.0 for Dynamics 365

Customer

[Civtec](#)

Implementation partner

[OA Systems](#)

Industry

[Construction](#)

Organization size

[325 employees](#)

Headquarters

[54 Evolution Drive, Horotiu
Hamilton 3241, New Zealand](#)

Solution

[Resco Field Service 2.0 for Dynamics 365](#)

Key benefits

- **A single app for everything**
- **High level of customization**
- **Streamlining work orders**

About Civtec

Civtec is a fast-growing business specializing in directional drilling, power, water, gas, telecommunications, and light civil works. The company was established in 2014. Since then, it has grown from a small enterprise to a significant partner for leading utility operators in both the North and South Islands of New Zealand. They have a proven track record of quality customer-focused delivery.

The company is locally owned and operated. They are proud to support the communities they serve and live in by employing locally, supporting, and investing in their employees, and reinvesting their profits back into their local communities. Since its beginnings, the Civtec team has grown across the regions. It is headquartered in the Waikato, with branches in Tauranga, Taupo, New Plymouth, and Christchurch. They employ a team of 325 skilled people across these branches.

Business challenge

Before implementing Dynamics 365 and Resco Field Service 2.0, Civtec used multiple applications to keep track of their field technicians' jobs. The company couldn't capture the use of time and materials in the field. That limited their ability to compile data that would allow for job cost reporting and accurate customer invoicing.

As Civtec was choosing a single solution to replace the multiple applications they used, they needed an all-in-one mobile solution to help them deal with the complex field service scenarios they often encounter. This solution needed to work seamlessly with Dynamics 365 CRM and Field Service and provide their field technicians with simple access to their daily schedules. It also had to be able to show technicians all relevant job information and allow for simple data entry and the ability to complete forms and attach documents and photos. Of course, it also needed to offer online capability, be highly customizable and well supported.

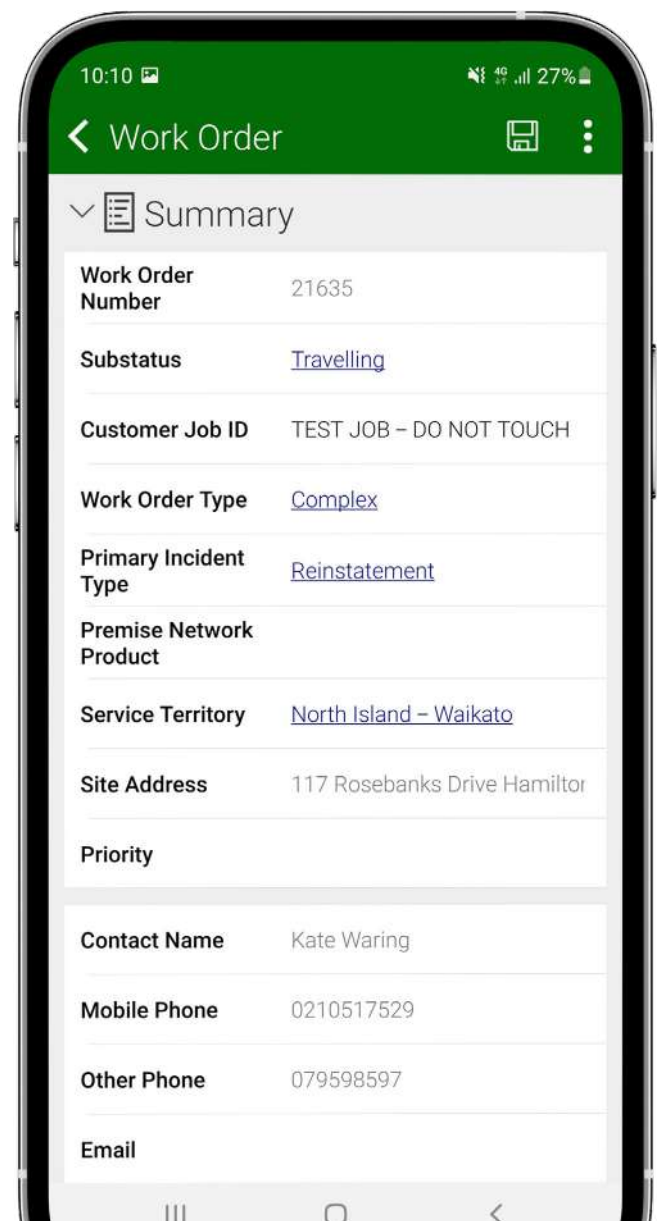
Solution

Before Resco, Civtec didn't use a single field service solution. When deciding what solution to choose, they considered several important things, such as customizability and offline features. After thorough research, Civtec chose Resco Field Service 2.0 for Dynamics 365. The main benefits that convinced them that Resco is the best fit were the application's customizability and the Resco Inspections feature. OA Systems, a New Zealand company based in Auckland with years of experience and clients throughout Australasia that specializes

in Microsoft Dynamics customer engagement, helped Civtec implement the solution. Together with OA System's team of dedicated experts, they successfully developed and implemented Resco Field Service 2.0 in just 4 months.

"During development, Resco was highly responsive to considering our use case and worked closely with us and our development partner to achieve a competitive licensing structure."

Kate Waring, Continuous Improvement Lead at Civtec





Thanks to Resco Field Service 2.0, Civtec's field technicians have immediate access to their customer bookings when scheduled in Dynamics 365 Field Service. They can see information such as type of work required, customer details, specific site instructions, or access route directions. In addition, they can also call and email customers straight from their bookings.

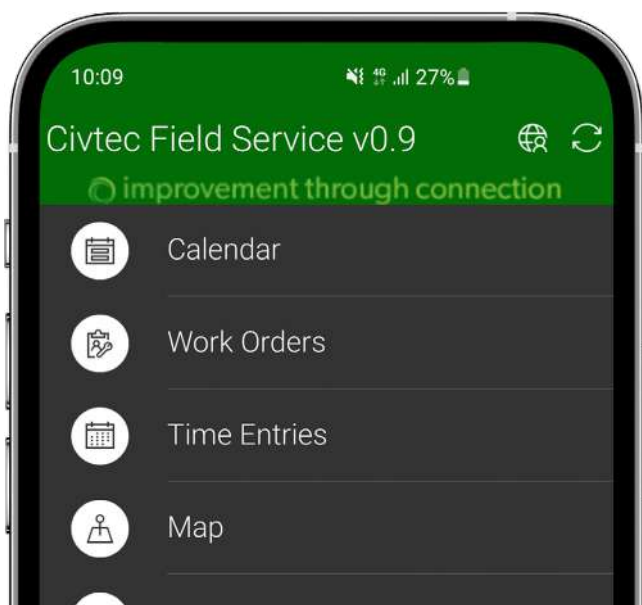
To keep track of time and material consumption on work order bookings, Civtec created a custom functionality. Material consumption is linked to stock held in each technician's stock location, allowing seamless stock and inventory management and reporting. What's more, on completing the order, technicians can also

record additional time and material that was used to complete the booking.

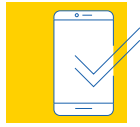
Before implementing Resco, technicians had to download completed inspection forms to their device in PDF form and then manually upload them to the work order document location. With the app, they were able to automate the process of uploading complete inspection forms and reports.

With Resco, Civtec was also able to create multiple app versions for different purposes with custom security roles and priorities for each group of users. This allows non-field staff to have a desktop version of the app to access and retrieve Inspection forms in cases where PDF generation and upload wasn't successful in the field (i.e., when sync errors prevented upload, or the tech forgot to upload the document).

To reduce sync times, Civtec set up filters to only sync data related to worker orders that concern the user. Technicians can also add relevant notes and attachments to the booking and use booking status changes to generate timestamps for travel and on-site work progress.

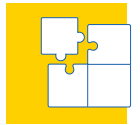


Benefits



A single app for everything

With Resco Field Service 2.0, Civtec was able to centralize their job and customer forms with a single application that supports technicians' end-to-end bookings management.



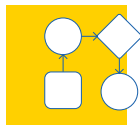
Highly customizable

Civtec viewed Resco's customizability as one of the main benefits. That is why they modified the app theme to align with their corporate branding and customized menu layouts and lists to show the most relevant fields first for users to read and select buttons easily.



Towards paperless operations

Like many companies, Civtec is working towards eliminating paper in its daily operations. With the Resco app, they were able to reduce the use of paper-based forms in the field.



Streamlining work orders

For Civtec, the Inspections add-on is one of the most valuable features of Resco, as it allows for building sophisticated job inspection forms with conditional logic. The form fields can be pre-population from Dynamics entities and fields. This add-on also automated the process of filling out and uploading inspection forms and reports.



Daily agenda at hand

When choosing the right mobile solution, one of the priorities was providing the technicians with convenient access to their schedules.

"Approximately 85% of Civtec customer bookings were scheduled and accessible in the Resco Field Service 2.0 app within the first week of go-live."

Kate Waring, Continuous Improvement Lead at Civtec



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