

ATNS

FIELD SERVICE MOBILITY & CRM INTEGRATION

Job Cards in the Field, Without the Remote Desktop

A cross-platform app that connects field technicians to Microsoft Dynamics CRM with minimal data use, and gives supervisors visibility of where their people are.

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Executive Summary

ATNS uses Microsoft Dynamics CRM for job card and issue tracking. Its technicians and supervisors work in the field, often in remote areas, and technicians accessed the system through Remote Desktop over VPN connections that could be slow because of the remote areas and the nature of their work.

ATNS partnered with iSolve Mobility to develop an app for technicians and supervisors working in the field. The mobile app integrates with CRM so technicians can access job cards with minimal data use and update job card statuses, while supervisors can track the whereabouts of technicians.

The brief wasn't to replace the CRM. It was to put the CRM in the technician's hand — with minimal data use, and without a Remote Desktop session over a slow VPN.

This case study is a working example of how field service teams can reduce their dependence on slow remote desktop access by extending CRM functionality into a mobile app.

Cordova

cross-platform mobile app

Minimal

data use for job card access

CRM

integration with Microsoft Dynamics CRM

Supervisor

visibility of technician whereabouts

The Business Problem

ATNS technicians and supervisors work in the field, often in remote areas. The job card and issue tracking system is Microsoft Dynamics CRM, but access depended on Remote Desktop over VPN connections that could be slow.

Underneath the surface-level ask of a mobile app sat a set of requirements the solution had to absorb:

- A mobile way for technicians to access job cards.
- The ability to update job card statuses from the field.
- Minimal data use.
- Better availability than Remote Desktop over VPN.
- Visibility for supervisors of technician whereabouts.
- Integration with Microsoft Dynamics CRM.

The constraint that shapes everything else is the working environment: remote areas, slow connections and the nature of the work itself.

Why This Was a Hard Problem to Solve Well

A mobile view of job cards is not difficult to draw. An app that works for field teams in remote areas, uses minimal data and stays connected to Microsoft Dynamics CRM is a different kind of problem — and that difference is exactly where we add value.

Designing for the field, not the office

Technicians work in remote areas where Remote Desktop over VPN could be slow. The app had to offer minimal data use and better availability for field use.

Integrating with an existing CRM

Job cards and issues already lived in Microsoft Dynamics CRM. The app integrates with it through RESTful services and .NET web services, so job card access and status updates work against the CRM itself.

Two audiences, one app

Technicians needed job cards and status updates; supervisors needed to track technician whereabouts. The solution serves both.

Understanding that the real constraint was the field — remote areas, slow connections — is what separates a mobile view of a CRM from a tool technicians can rely on.

Our Role: From Problem to Platform

We developed a cross-platform mobile app on Cordova and integrated it with Microsoft Dynamics CRM using RESTful services and .NET web services.

- Developed a cross-platform mobile app on Cordova for technicians and supervisors.
- Integrated the app with Microsoft Dynamics CRM using RESTful services and .NET web services.
- Enabled technician access to job cards with minimal data use, and job card status updates.
- Gave supervisors the ability to track the whereabouts of technicians.

The Solution We Delivered

The result is a cross-platform field app that supports job card access, status updates, supervisor visibility and Microsoft Dynamics CRM integration.

Technician App

Lets technicians access job cards with minimal data use and update job card statuses from the field.

Supervisor Visibility

Lets supervisors track the whereabouts of technicians.

CRM Integration

RESTful services and .NET web services connect the app to Microsoft Dynamics CRM.

Platform capabilities at a glance

- Technician access to job cards.
- Job card status updates.
- Minimal data use.
- Improved availability for field use.
- Supervisor tracking of technician whereabouts.
- CRM integration.

Technology Stack

Mobile App	Cordova, for cross-platform mobile development.
Integration	RESTful services and .NET web services.
CRM	Microsoft Dynamics CRM integration.

Business Value Delivered

A Mobile Alternative to Remote Desktop

- Technicians have a mobile alternative to Remote Desktop and slow VPN access.
- Job cards can be accessed with minimal data use.

Updates From the Field

- Technicians can access and update job cards in the field.
- Improved availability supports field use.

Supervisor Visibility

- Supervisors can track the whereabouts of technicians.

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Why It Matters

ATNS shows how field service teams can reduce their dependence on slow remote desktop access by extending CRM functionality into a mobile app.

- Extending an existing CRM to mobile can reduce the need for Remote Desktop sessions over slow connections.
- Minimal data use matters when technicians work in remote areas.
- The same app can serve technicians and supervisors.
- RESTful and .NET web services provide the integration route into Microsoft Dynamics CRM.

If your field teams rely on slow remote access to systems they need every day, this is the kind of extension we build: integrated properly, engineered for the conditions they work in, and delivered as an app they will actually use.

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