

CRM connect

Introduction to Field Service





Can you hear me?



Is everything clear?



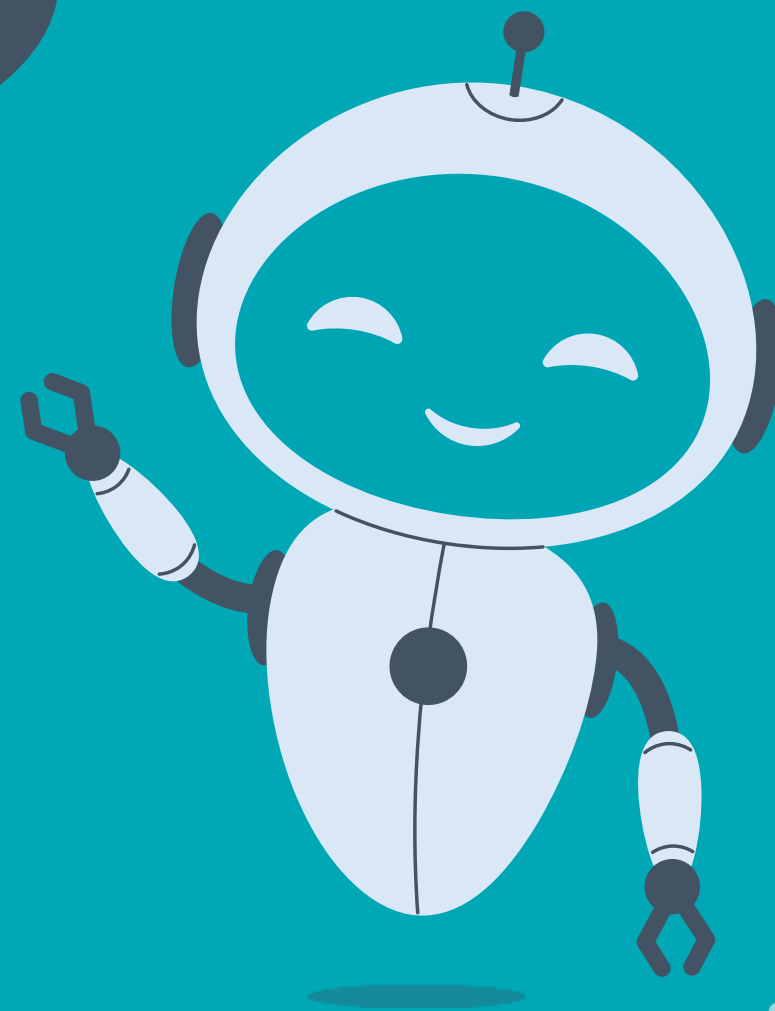
~ 45 mins



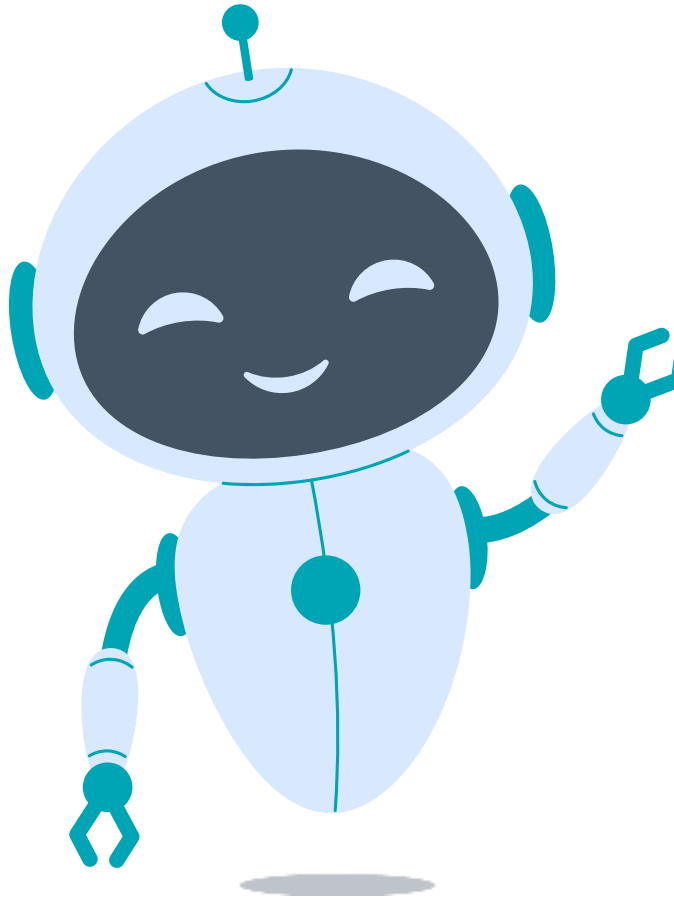
Q & A



Kelly



Presentation Agenda



- Overview of Dynamics 365 Field Service
- Core Components of Field Service Management
- Demo
- Future Trends in Field Service Management



Overview of Dynamics 365 Field Service

What is Dynamics 365 Field Service?



- Part of Microsoft Suite and native CRM app, meaning can be used as an extension of, or in conjunction with Sales and Service processes
- Managing Service Processes, end to end
- Real-Time Data Access
- Has been available for quite a while, but due to lack of integration with BC wasn't really a viable solution
- Document and inspection report generation and output

Key features and functionalities

Smart Scheduling

Smart scheduling optimizes resource allocation and helps teams respond quickly to service requests, enhancing efficiency.

Work Order Management

Work order management streamlines job assignments and tracking, ensuring timely completion of service tasks.

Inventory Tracking

Inventory tracking allows for real-time visibility of stock levels, reducing delays and improving service delivery.

Mobile Access

Mobile access empowers field technicians with the information they need on the go, enhancing productivity and service quality.

IoT Integration

Integration with IoT devices enhances service capabilities through real-time data and predictive maintenance.

Wide Range of real-world applications

Can be used for a multitude of business processes including installation, conducting surveys & generating commissioning reports

Internet of Things... Is what now?



- Everyday Objects talking to each other
- You likely already use it!
- Allows for devices that are internet facing to alert issues, even before users realise something is wrong!



Core Components of Field Service Management

Resource Management



Workforce Oversight

Effective resource management requires careful oversight of personnel to ensure optimal service delivery and productivity.



Skills Management

Assessing and managing technician skills is crucial for assigning the right tasks and enhancing service quality.



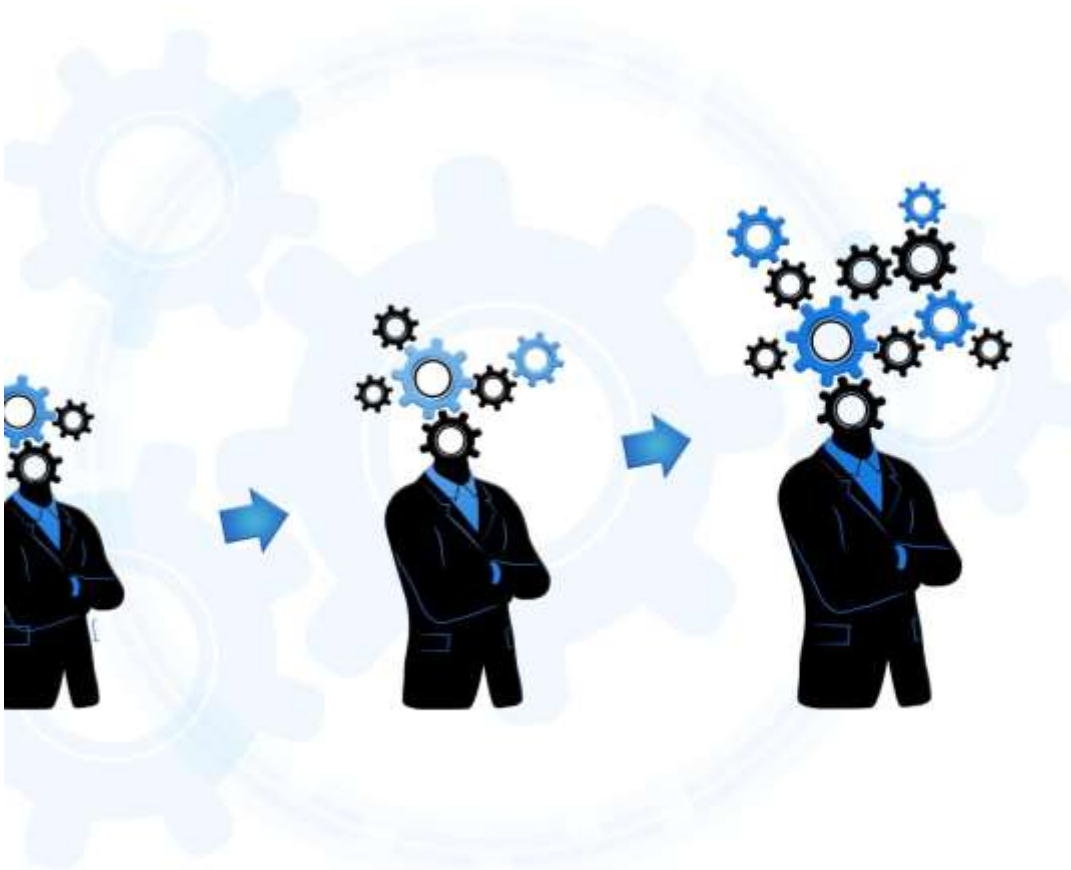
Equipment Utilization

Optimizing the use of tools and equipment is essential for maximizing productivity in service operations.



Demo

Scheduling and dispatching



Importance of Scheduling

Effective scheduling is essential to ensure optimal allocation of resources and timely service delivery.

Role of Dispatching

Dispatching ensures that the right technician is assigned to the appropriate job based on their skills and availability.

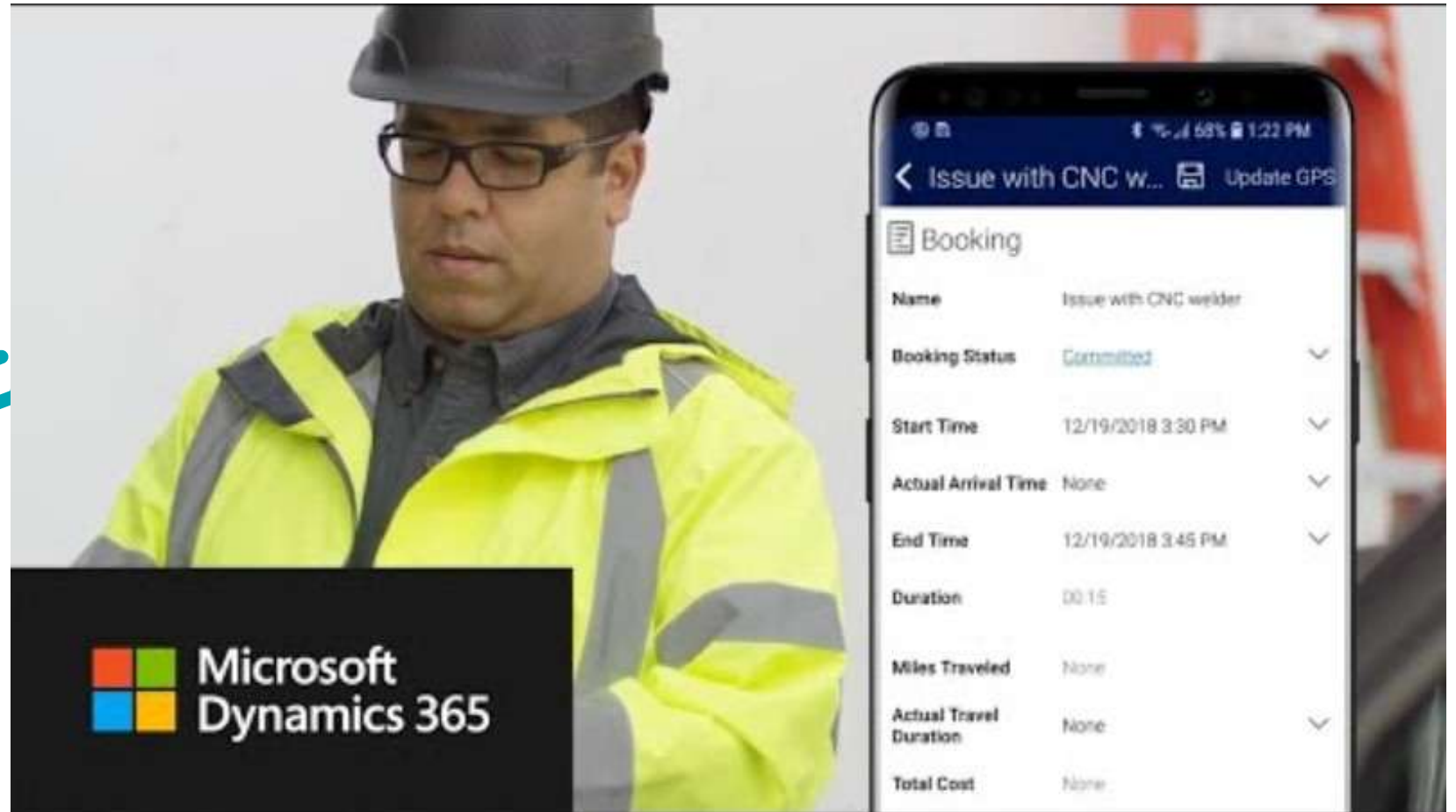
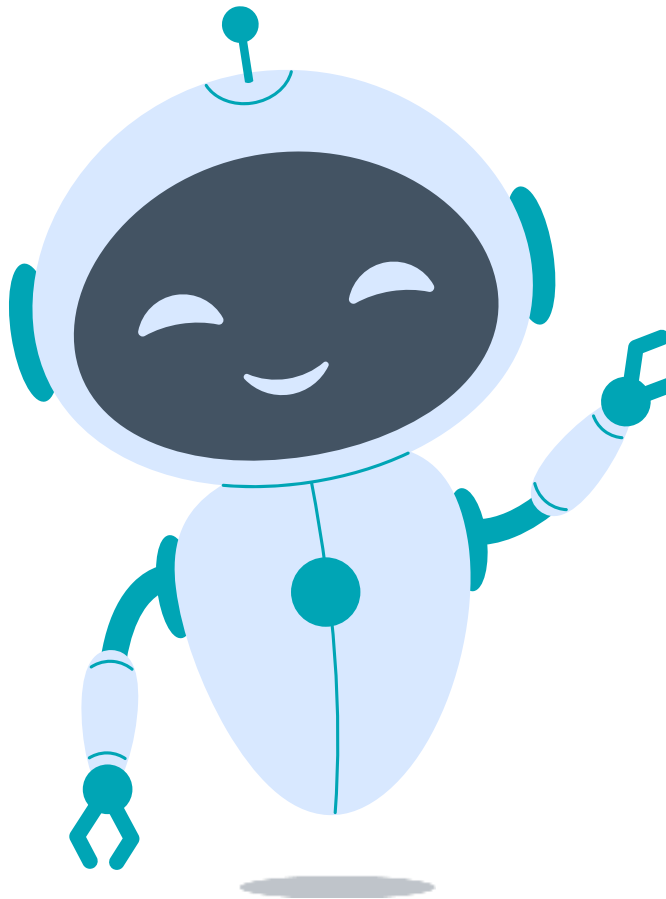
Optimizing Service Delivery

By optimizing scheduling and dispatching, organizations can enhance service quality and customer satisfaction.

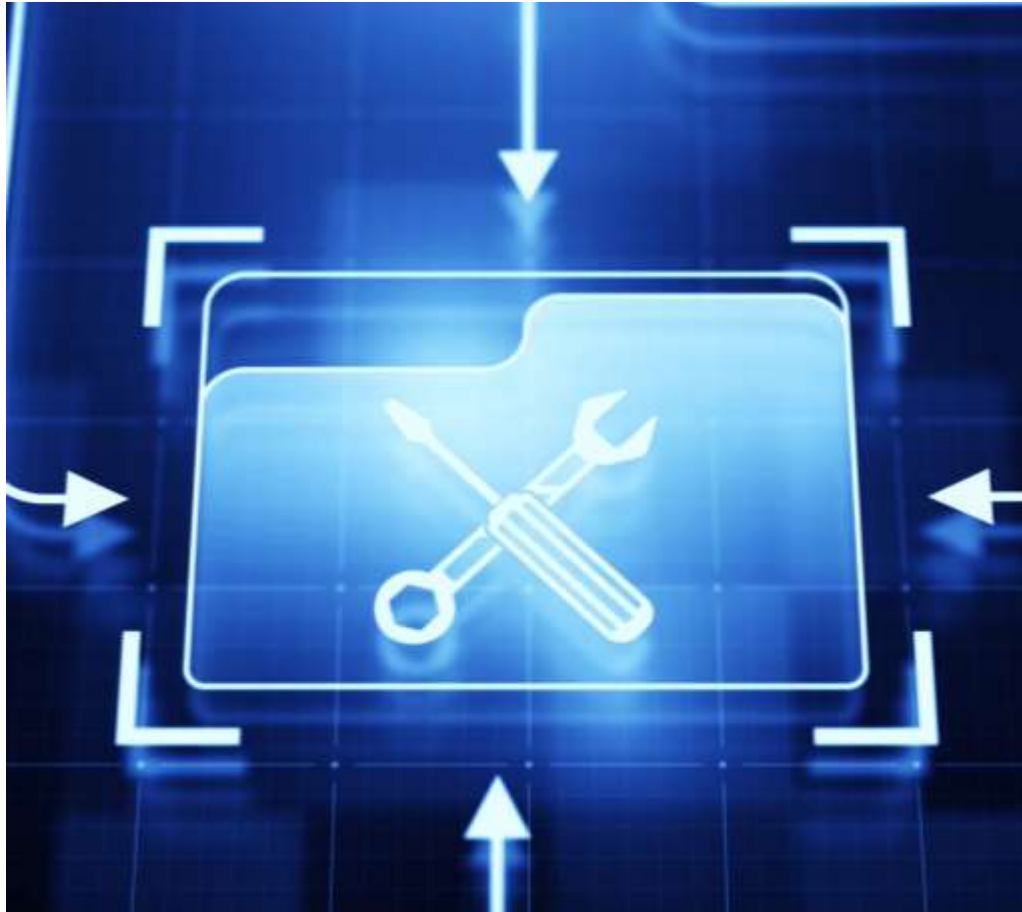


Demo

Resource Scheduling Optimisation (RSO)



Work order management



Foundation of Operations

Work order management forms the backbone of effective field service operations, facilitating seamless service delivery.

Creating Service Requests

The process begins with creating service requests, which are essential for tracking and managing tasks efficiently.

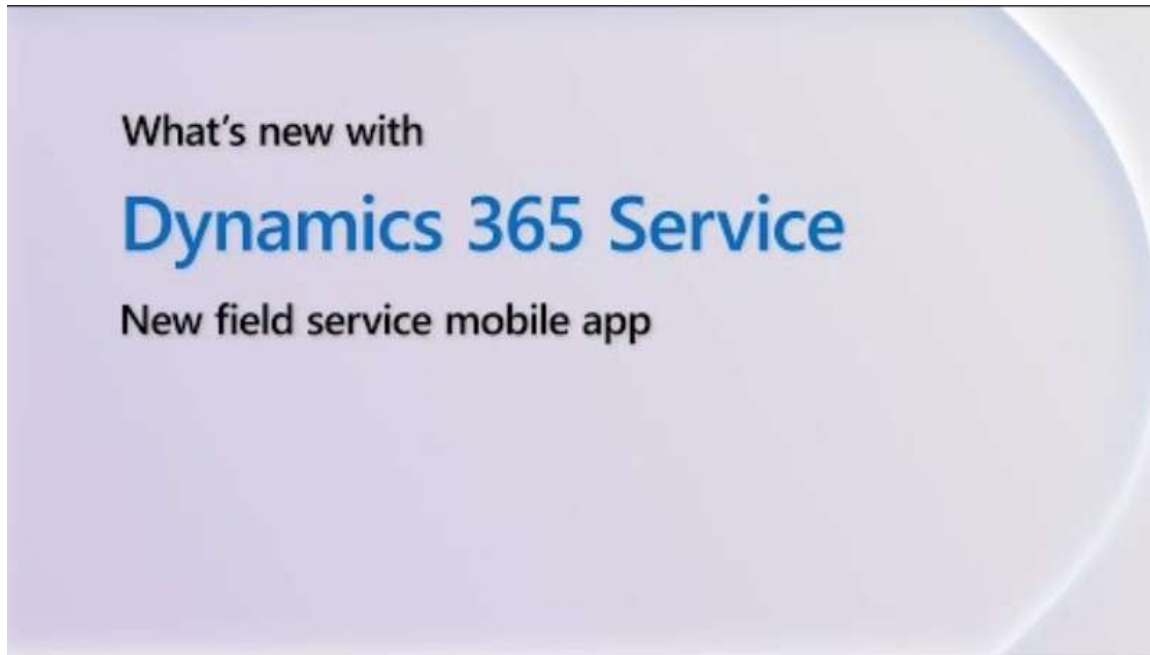
Tracking and Managing Tasks

Tracking and managing tasks ensures that every service request is addressed promptly and completed efficiently.



Demo

Mobile App & Offline Functionality

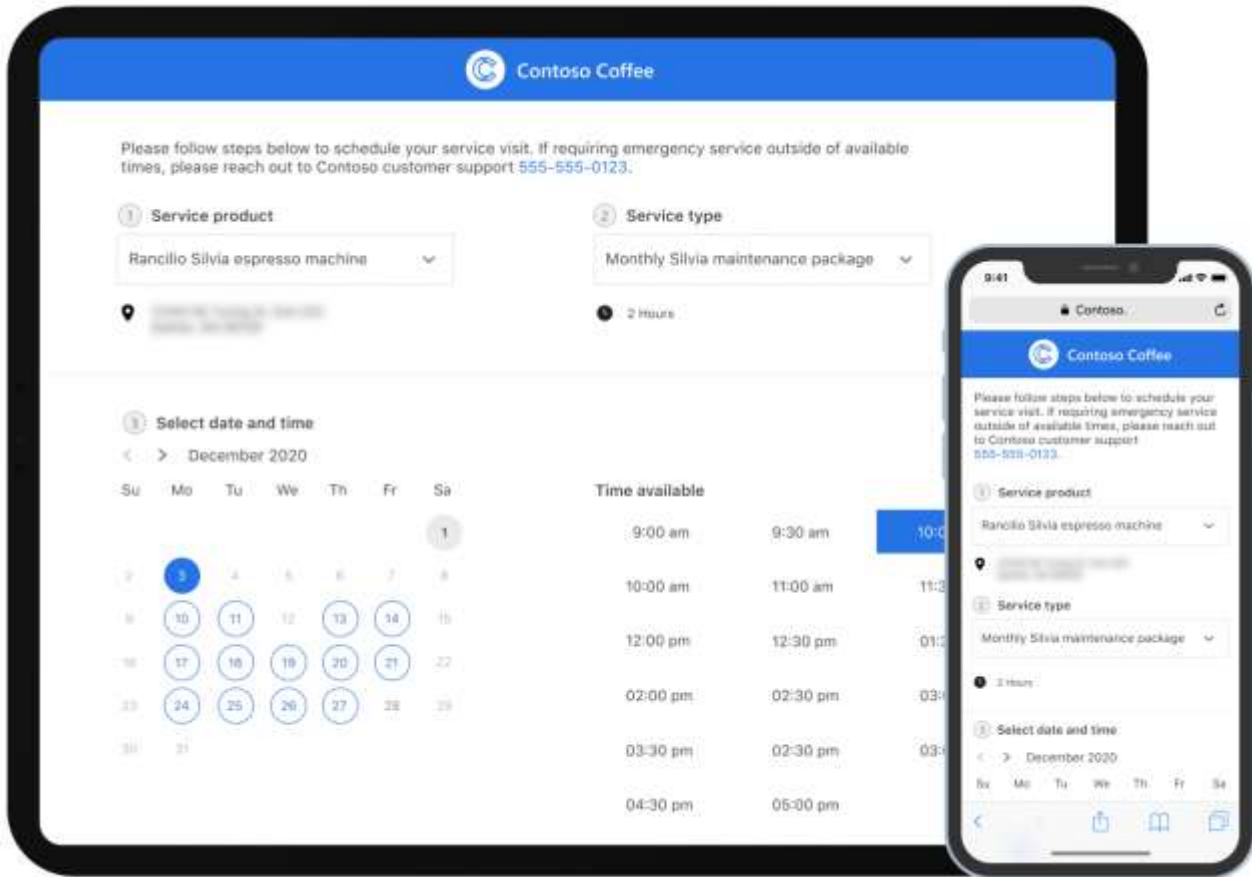


- Engineers can complete the works orders required without internet
- Offline First
- Profiles
 - Maintain Security
 - Limit Download sizes



The Future for Field Service

Advancements in Portal



Power Pages Template

So it acts like any other native portal connected to Dynamics 365, but can't be added to an existing website currently

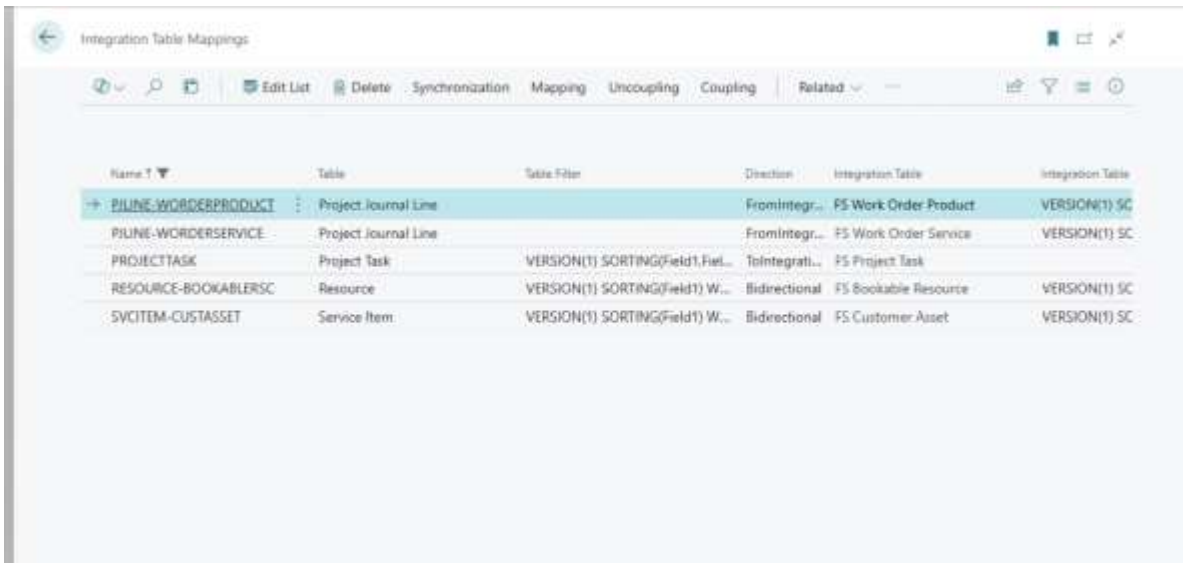
Self Service

Customers can see available times and book their own servicing as required

Work Order Tracking

Customers can see the status of their Work Order in the portal, cutting down on queries around status updates.

Business Central Integration



Name	Table	Table Filter	Direction	Integration Table	Integration Table
PIUNE-WORDERPRODUCT	Project Journal Line		FromIntegr...	FS Work Order Product	VERSION(1) SC
PIUNE-WORDERSERVICE	Project Journal Line		FromIntegr...	FS Work Order Service	VERSION(1) SC
PROJECTTASK	Project Task	VERSION(1) SORTING(Field1, Fiel...	ToIntegrati...	FS Project Task	
RESOURCE-BOOKABLERSC	Resource	VERSION(1) SORTING(Field1) W...	Bidirectional	FS Bookable Resource	VERSION(1) SC
SVCITEM-CUSTASSET	Service Item	VERSION(1) SORTING(Field1) W...	Bidirectional	FS Customer Asset	VERSION(1) SC

Work Orders to Projects

Link Work order to Projects to enable the consumption of Stock and billing of resources

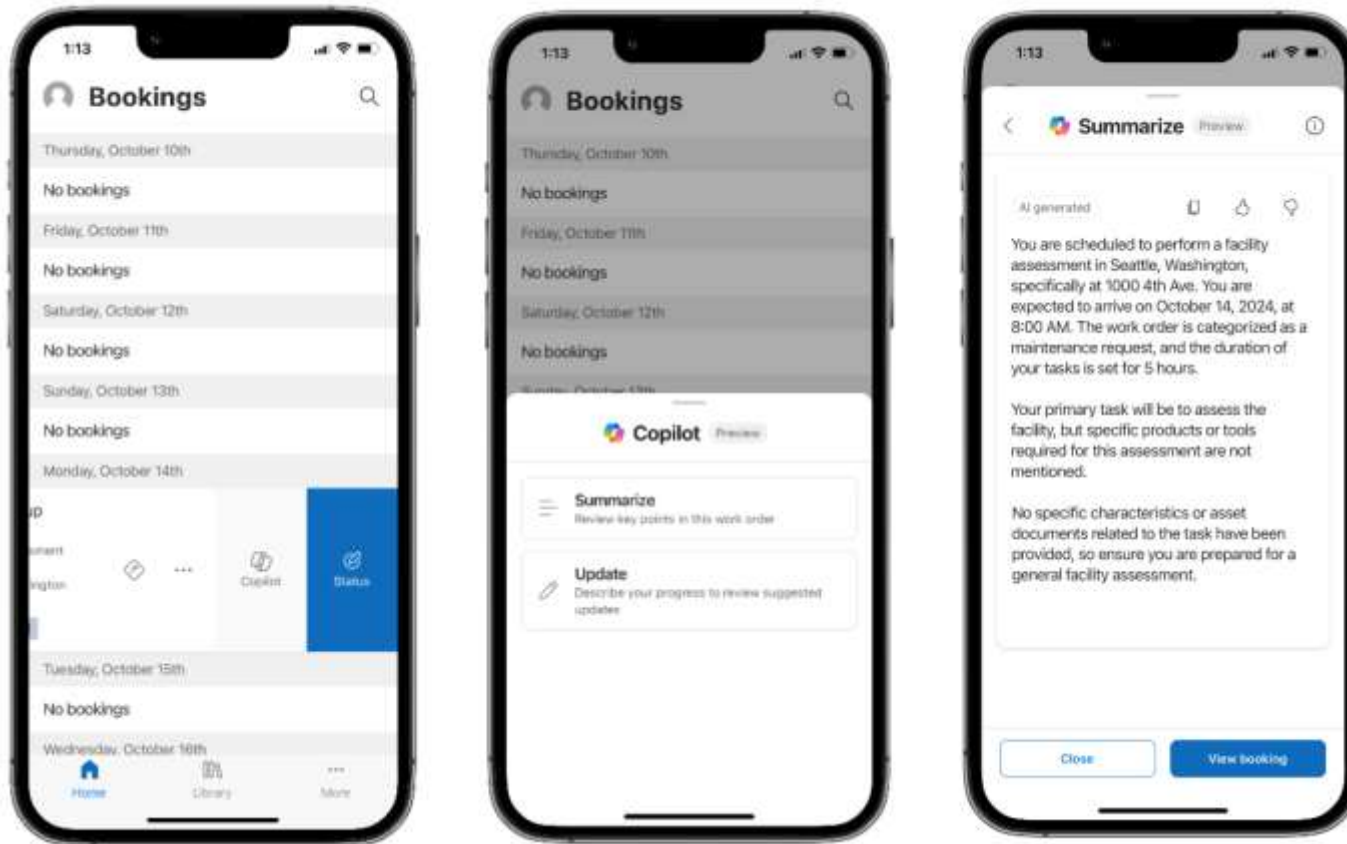
Generating Invoice directly in Business Central

The integration allows for the invoicing of the project (work order) directly in BC and this feeds through to CRM

Assets

Assets that are automatically created by the Work Order processes can be synchronised to Service Items for tracking in Business Central

Field Service Agent & Co Pilot



Co Pilot

Can be used to summarise the work order to generate reports and outputs

Inspection Builder

Can use previously generated inspections and files to generate a new inspection for use against service tasks

Q&A

Conclusion

Integrated into BC

We expect to see more organizations utilizing the functionality of Field Service now that it can be used in conjunction with Business Central efficiently

Flexibility of the Power Platform

Because Field Service is built on the core of CRM and the Power Platform, it is flexible and customisable with additional fields and extension of processes

Offline Capability

The ability to use the native app offline removes the need for 3rd party software

For further information or to arrange a more in-depth conversation, please speak to your Customer Engagement Manager and we can arrange to have a call and provide further details.

Thank you!



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THURSDAY 15th MAY 2025

