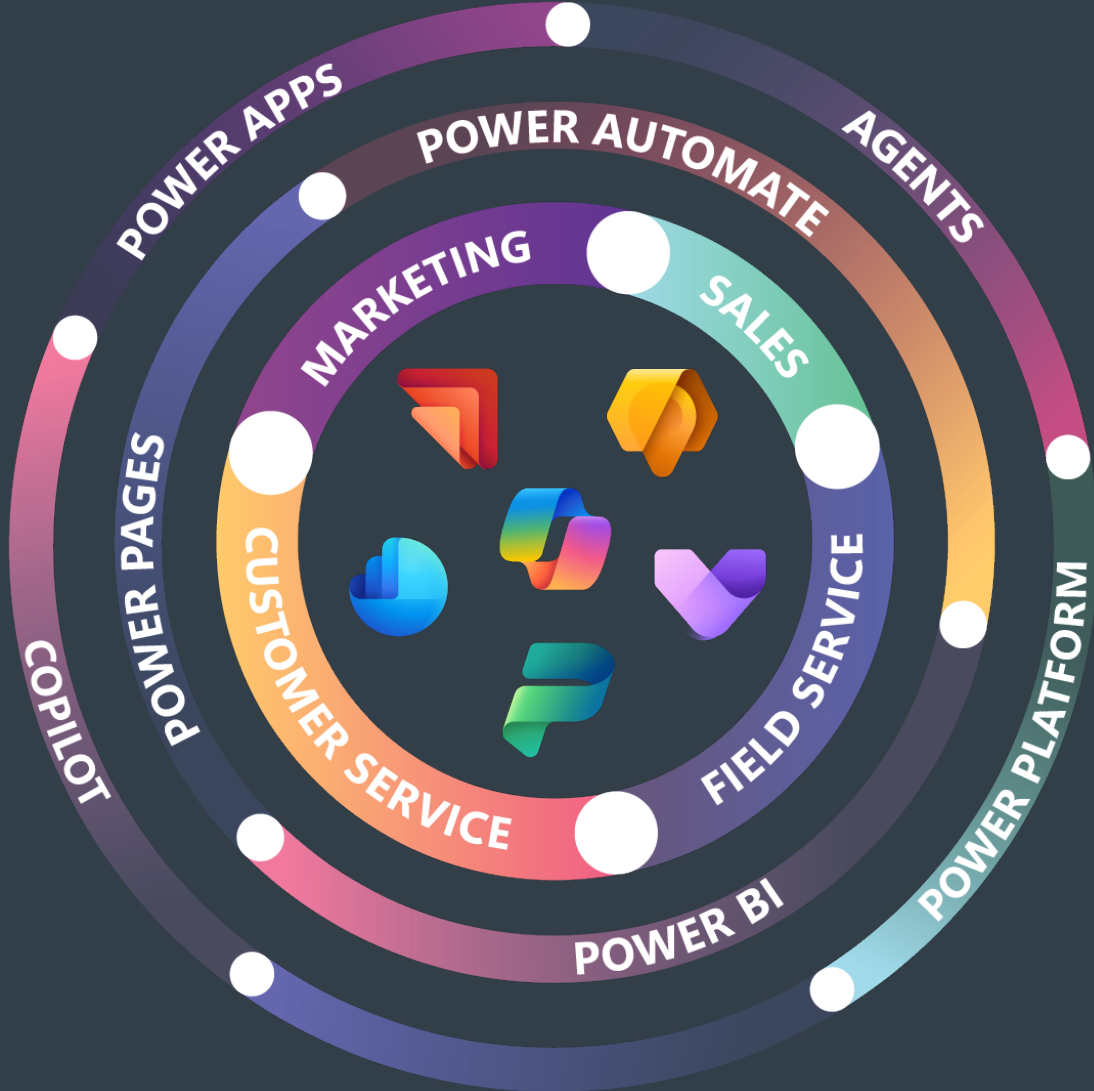


# CRM connect

Less Admin, Better Service using Field Service, Business Central & Your AI Scheduling Agent





# Field Service Overview

# Field Service Overview

## Part of Dynamics 365 CRM

Field Service isn't just integrated into CRM, but it is a core part of CRM meaning you can leverage all the capabilities of the Dynamics 365 & Power Platform Suite of tools, and this now includes native integration to Business Central.

## Managing Service Operations

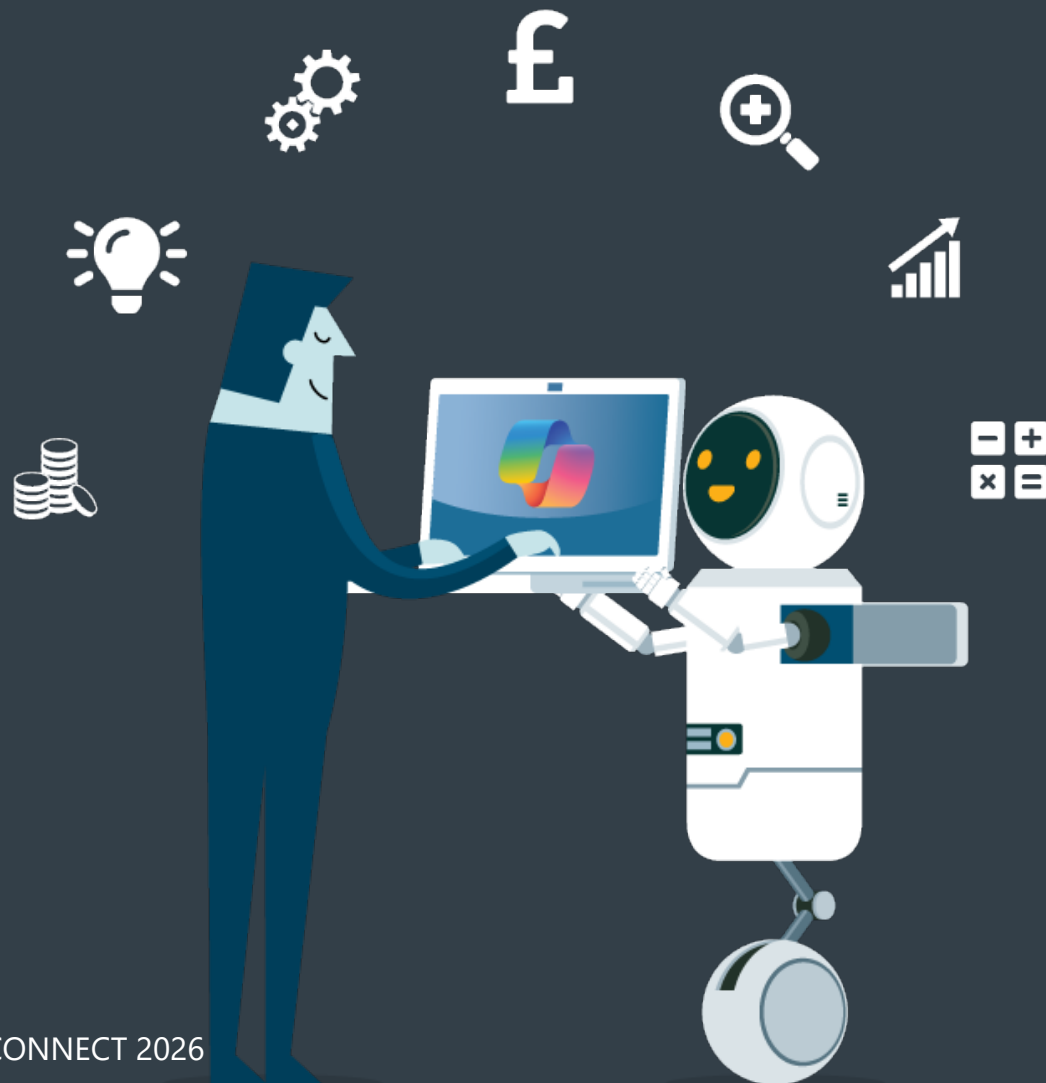
Create contracts and agreements that can manage Warranties, Routine Maintenance, Emergency Call Outs along with Project Installs and more

## Real-Time Insights

With the use of the mobile app, data is updated in real-time by the field engineer meaning the whole organisation can see and feedback on what is happening on the ground.



# Key Features - Schedulers



## Smart Scheduling

Smart scheduling optimises resource allocation, based on skills, region and more, allowing teams to respond quickly to service requests, enhancing efficiency.

## Work Order Management

Work orders contain service tasks to manage expected activity and output per job so that when an engineer arrives on site, they already know what needs to be done.

## Inventory Tracking

Inventory tracking allows for almost real-time visibility of stock levels from Business Central (and other ERP), enabling van stock management with ease.

## IoT Integration

Integration with IoT devices means Work Orders could be raised and an engineer awaiting scheduling without human intervention, driving predictive maintenance.

# Key Features - Engineers

## Mobile Access

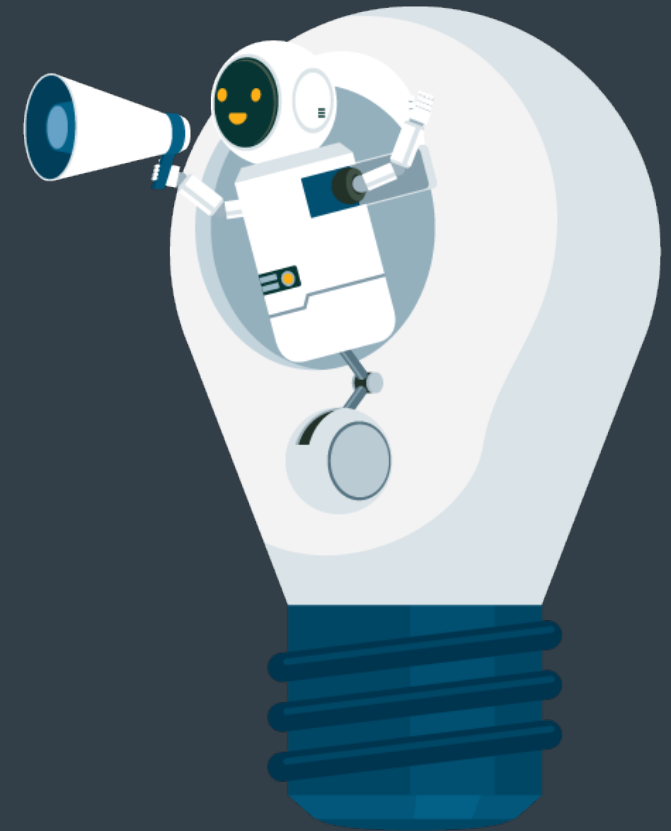
Mobile access empowers field technicians with the information they need on the go, enhancing productivity and service quality. Ability to see the job, and tasks expected.

## Offline Functionality

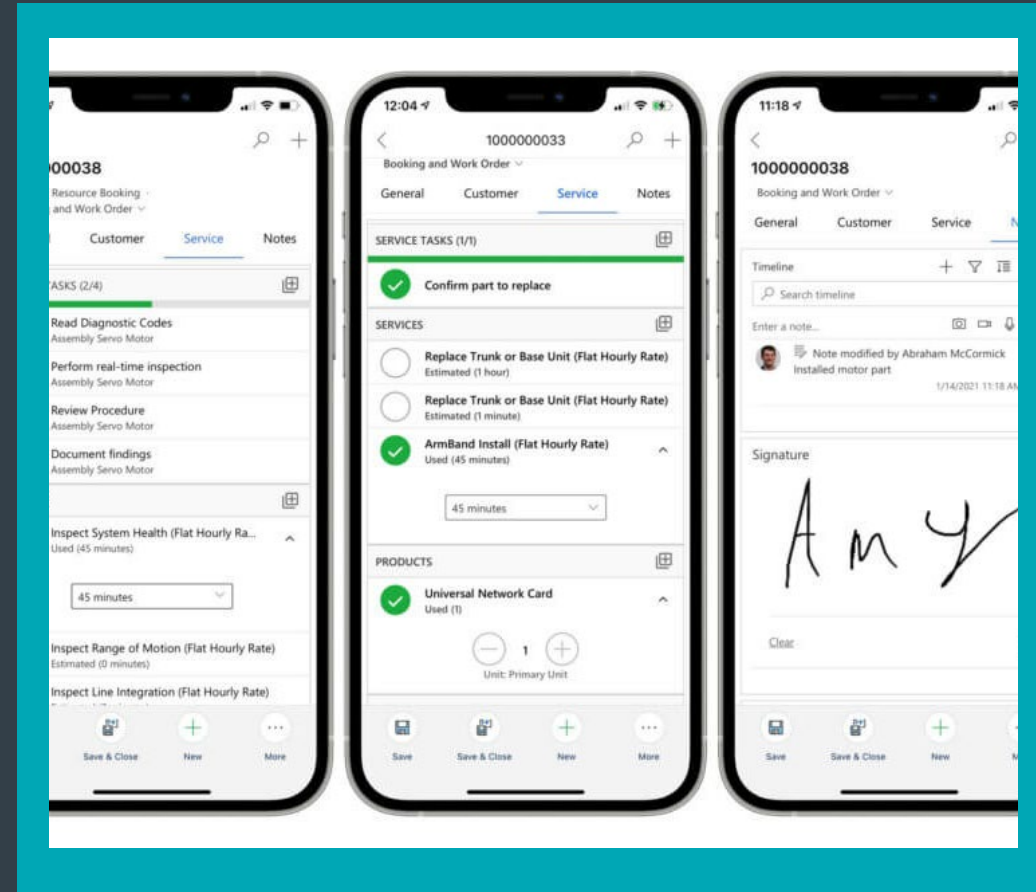
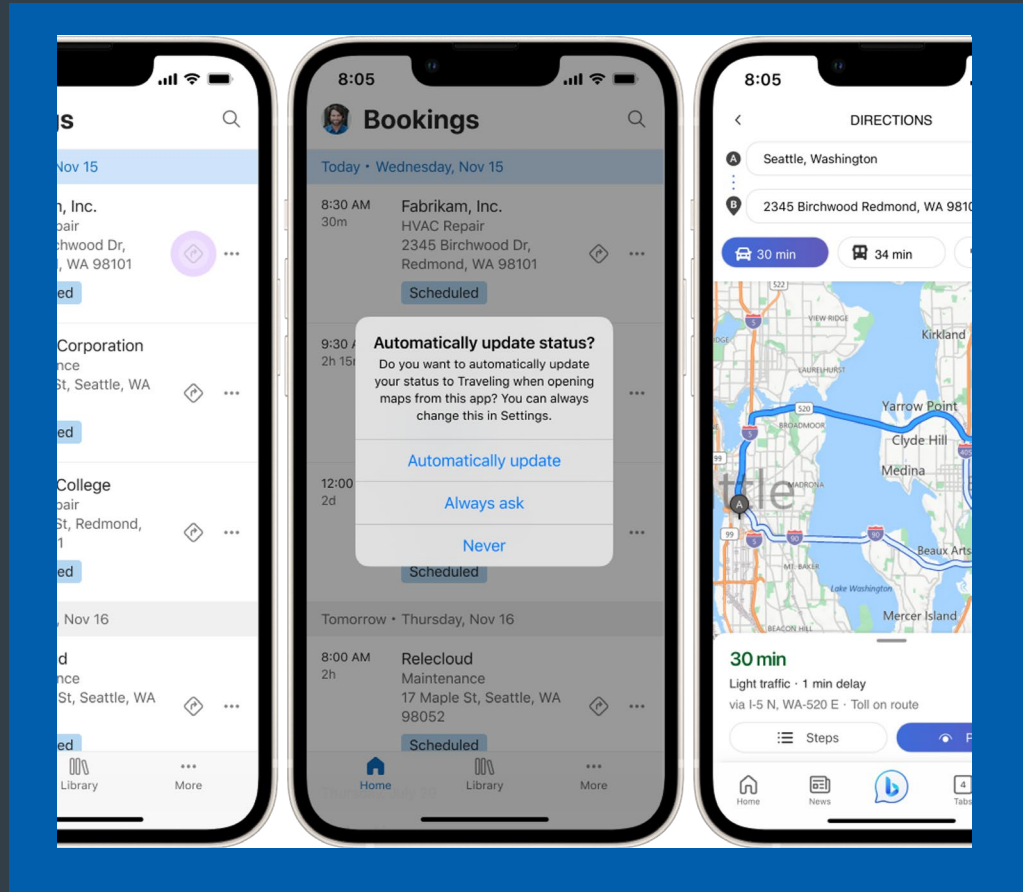
Allows engineers to still complete the data, reports and tasks in the App whether they are connected to the internet or not and then synchronises back to FS once a connection is detected.

## Historical Data

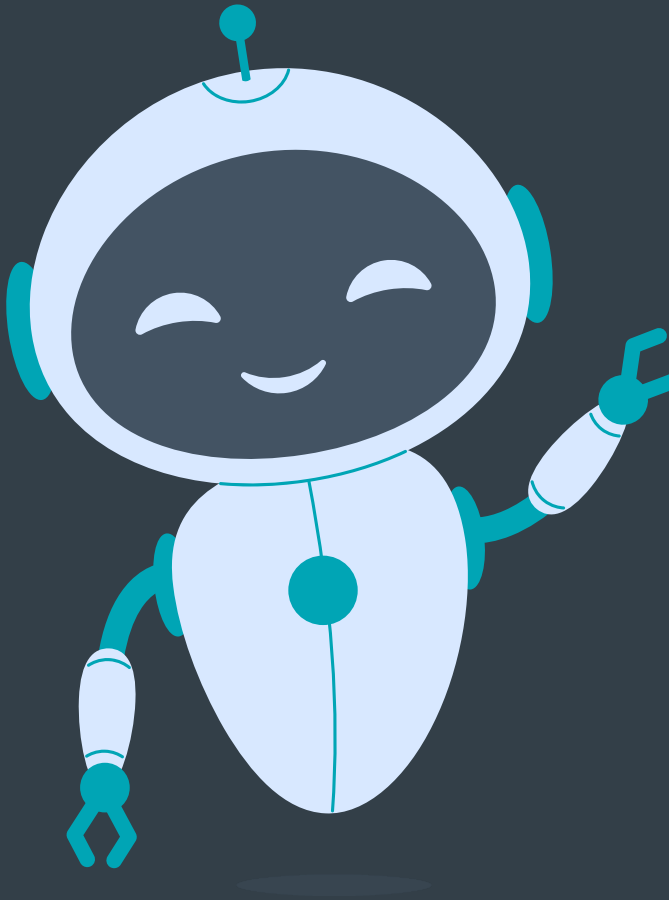
Engineers have access to historical data at the touch of a button so can use this to diagnose potential issues and identify recurrences



# Key Features – Mobile App



# Business Benefits & Outcomes



## **Improved Customer Satisfaction**

Real time updates and reports can be sent to Customers to allow them to be kept upto date on the status of their Work Orders

## **Reduced Operational Costs**

The combination of reduction of manual paperwork and smart scheduling mean that jobs and paperwork can be completed in the most efficient order and whilst still on site, leading to less 'admin' time and wasted travel time.

## **Increased First-Time Fix Rates**

Providing Knowledge Base articles and previous product fixes as insights into possible root causes mean that Engineers can diagnose the issue more effectively.

## **Enhanced Service Visibility**

Greater visibility into service operations enables better decision-making and improved management of resources. Spot trends and behaviours developing.

## **Asset Tracking**

Enables all users to see Customer Assets and the statuses of them.



# Field Service Scheduling Agent

# Field Service Scheduling Agent

## AI-Driven Scheduling Support

The Agent uses AI to determine the best route based on either time or priority

## Integration with Dispatcher Workflow

The Agent is accessed via the Scheduling Board, meaning it is already in the place most Schedulers are working.

## Balancing Automation and Control

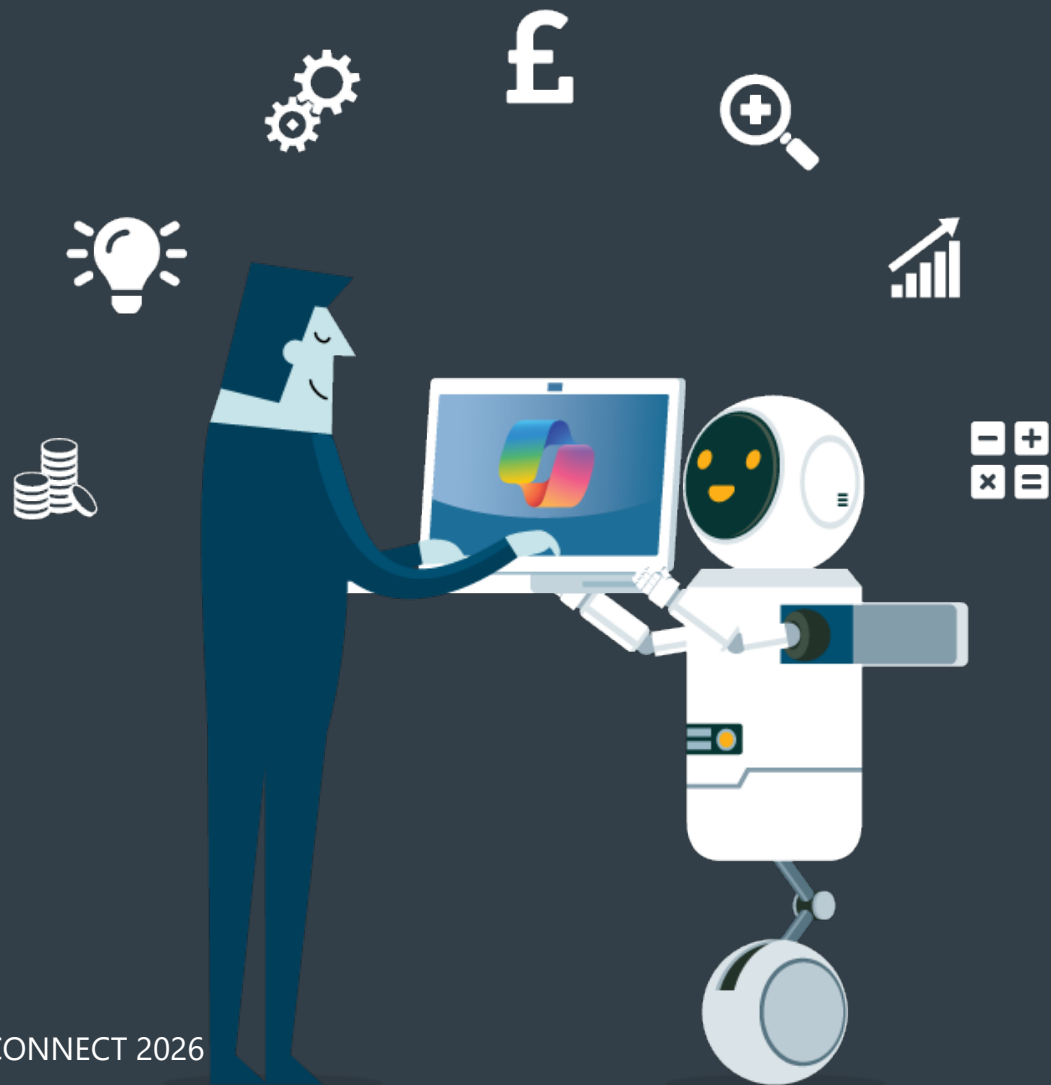
The Agent recommends a Schedule and then gives the user a chance to make changes before committing it to the board

## Strategic Evolution in Field Service

This Agent is the first step towards a more efficient and automated scheduling service and it is only the beginning.



# What the Agent Can Do Today



## Single Technician Optimization

The agent optimizes schedules for one technician at a time, balancing bookings, priorities, and travel to improve efficiency.

## Rapid Disruption Response

It quickly adjusts schedules to handle early completions, cancellations, or delays, minimizing impact on other appointments.

## Human-in-the-Loop Approach

The agent provides recommendations for dispatchers to review, ensuring human judgment guides final scheduling decisions.

## Seamless Integration

Supports various resource types within the Universal Resource Scheduling framework, ensuring easy adoption without major changes.

# What Is Being Added in Wave 1 2026

## **Multi-Resource Optimization**

Once the 2.0 version is released, up to 5 resources can be scheduled simultaneously from the Scheduling Board

## **Strategic Optimization Plans**

Optimisation Plans can be set up to run over night and can be used for up to 30 resources. These will also be reviewed before being committed to the board.

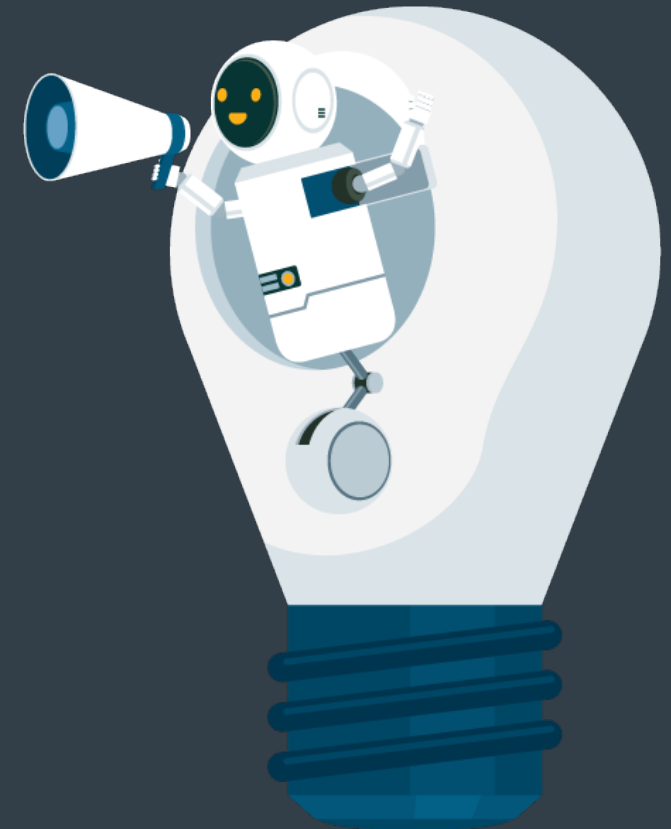
## **Optimization Scopes and Transparency**

In addition to resources, 2.0 will allow scheduling per Territory or Per Resource group to be optimized by the Agent

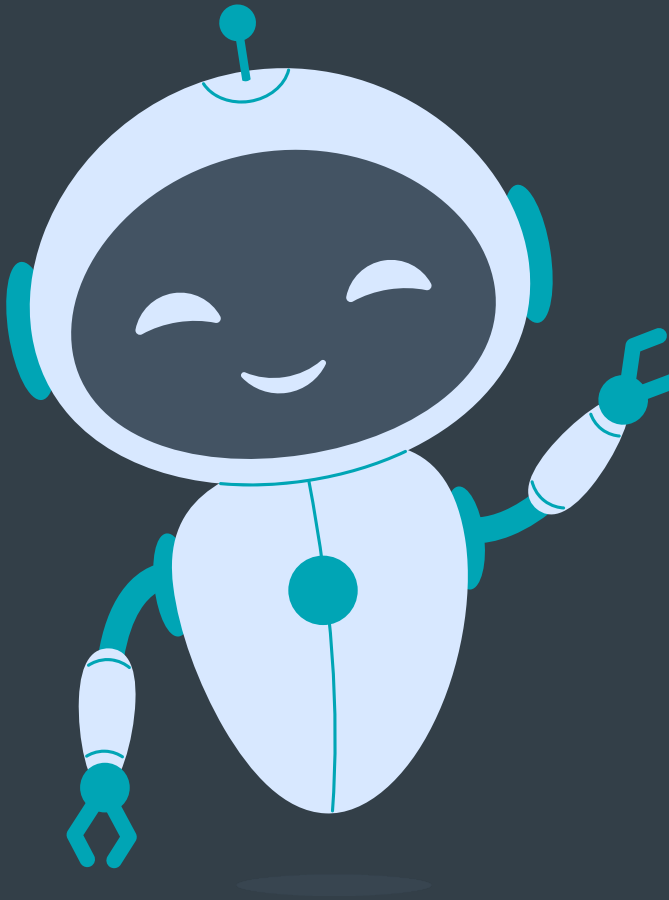
## **“From Tactical to Strategic Tool**

Enhancements transform the agent into a strategic tool aligned with AI-driven complex coordination and human oversight.” – Microsoft Docs

*Public Preview June 2026, GA March 2027*



# Business Benefits & Outcomes



## **Reduced Manual Effort**

The agent automates scheduling tasks, saving dispatchers time on recalculations and reprioritizing work orders.

## **Improved Service Reliability**

By optimising promise windows and priorities, late arrivals and missed appointments are minimised.

## **Better Technician Utilization**

The agent fills schedule gaps caused by cancellations or early completions to boost productivity.

## **Enhanced Dispatcher Confidence**

AI-backed recommendations reduce variability and support consistent, reliable scheduling decisions.



# Demonstration



# Field Service & Business Central

# Field Service Integration

## **Standard Microsoft-supported integration**

Uses the same structures and processes as the Dataverse and Sales Integration, utilising Virtual Tables for some aspects

## **Field Service manages operational work execution**

The Order are scheduled using the Universal Resource Scheduler. The completion of the orders is carried out using the dedicated Field Service Mobile app

## **Business Central manages finance, invoicing, and inventory**

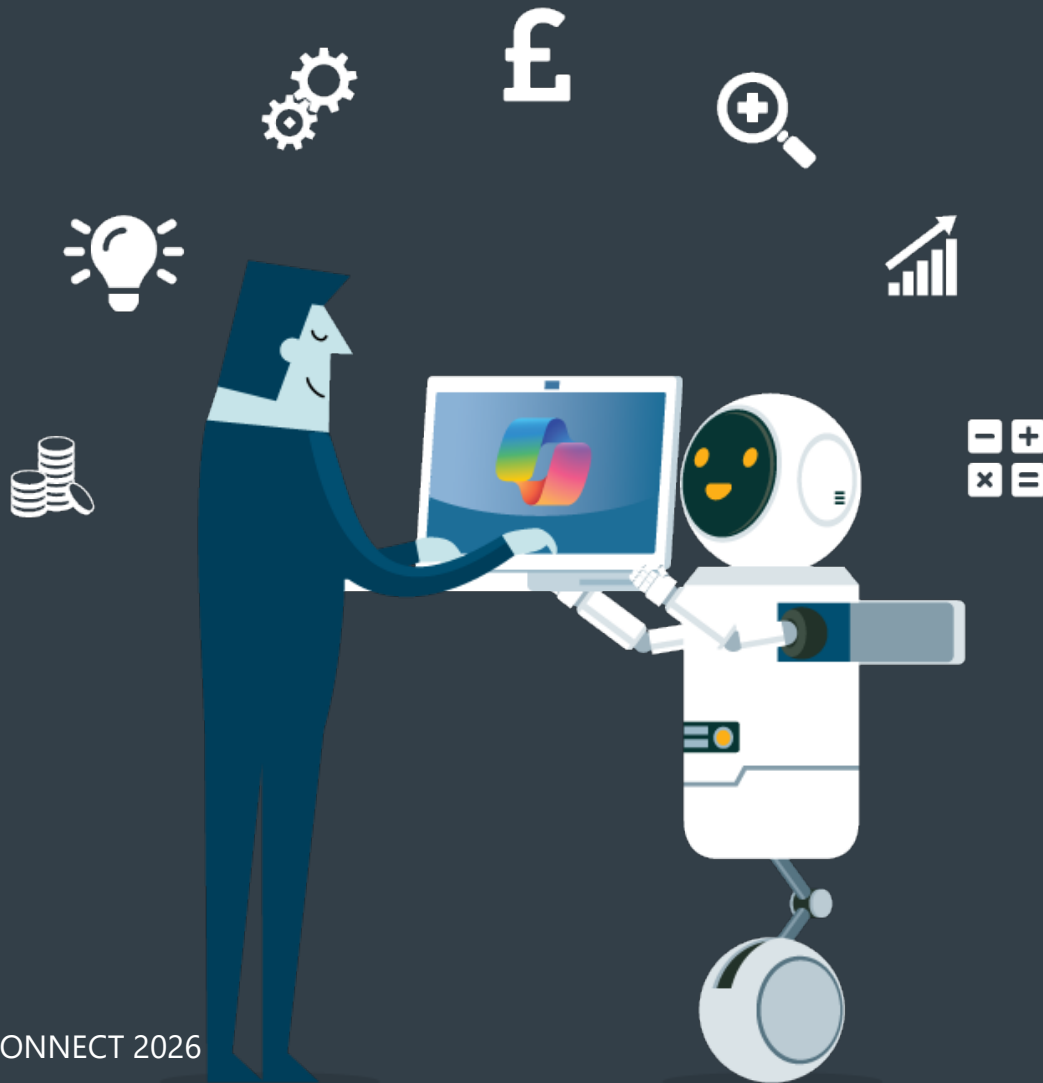
Details are returned to BC about what stock has been consumed in Van Locations for Inventory Management, and Consumption against a Service Order to be invoiced.

## **Two Types of Integration**

Either Project based for simple time billing or Service Order based for more advanced servicing and Part consumption



# Project Based



## When to Use

- Work is managed as part of a project lifecycle
- Typical for installations, long-running jobs, or contract work
- Requires detailed project tracking and financial reporting

## How it Works

- Work orders are linked to Business Central projects
- Technician time posts as project time entries
- Materials post to project consumption
- Invoices generated from the project in Business Central

# Service Order Based

## When to Use

- Combination of project work and ad-hoc service
- Recurring maintenance plus project-based work
- Different billing and operational models in one environment

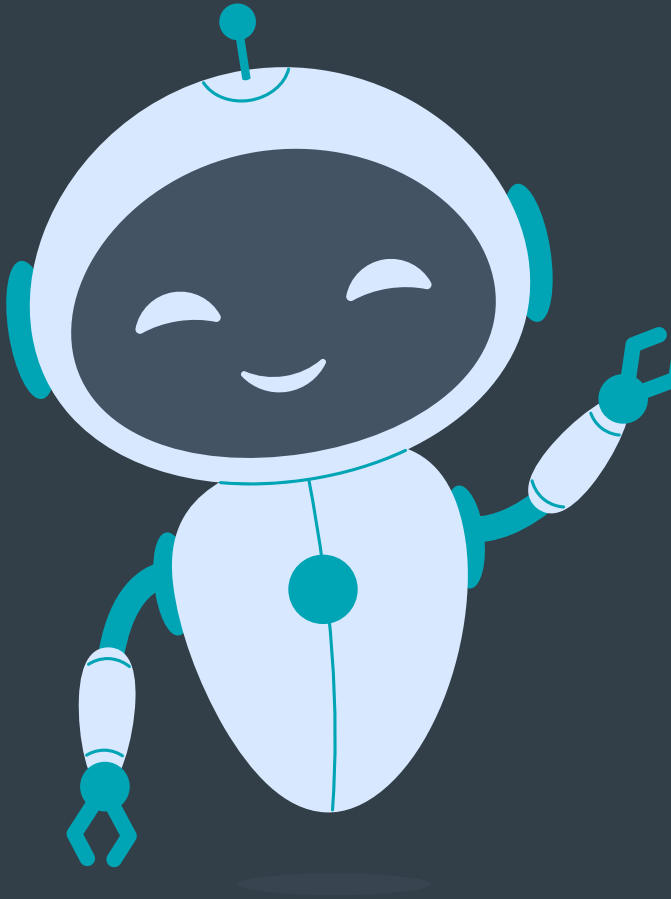
## How it Works

- Project work orders link to Business Central projects
- Break-fix or service calls create or can be created from Service Orders
- Time and materials routed based on work type
- Finance rules applied consistently in Business Central

***Requires Business Central Premium to access and use the Servicing Modules***



# Business Benefits & Outcomes



## Project Based:

- Accurate project cost and margin tracking
- Supports fixed-price or milestone billing
- Strong financial and reporting control
- Clear visibility of project performance

## Service Based

- Flexibility across service and project delivery models
- Single operational experience for technicians
- Clear separation of billing logic
- Scales as service offerings expand



# Demonstration

# Demonstration of Scheduling Assistant - Now

The screenshot displays the Microsoft Dynamics 365 Field Service interface. At the top, there's a navigation bar with 'Dynamics 365 | Field Service' and a search bar. The left sidebar contains a menu with categories like 'My Work', 'Scheduling', 'Customers', 'Service Delivery', and 'Assets'. The main content area features a welcome message for 'Kelly Warby' and a 'Learn more about Field Service' section with three cards: 'Smarter Field Execution with Dynamics 365 Project Operations', 'Optimize schedules with the Scheduling Operations Agent', and 'Try Inspection Builder'. Below this is a 'Get up and running' section with four steps: 'Set up your users', 'Create your accounts', 'Create your work orders', and 'Schedule your work orders'. Each step includes a small image, a description, and a 'Learn more' link. The bottom of the interface shows a 'Service' button in the sidebar.

**Navigation Bar:** Dynamics 365 | Field Service | Search

**Left Sidebar:** Home, Recent, Pinned, My Work (Get Started, Dashboards, Service Board, Service board Sched...), Scheduling (Work Orders, Schedule Board, Bookings, Resource Requireme..., Requirement Groups, Time Off Requests, Time Entries), Customers (Accounts, Contacts), Service Delivery (Cases, Agreements, Warranties), Assets (Assets, Functional Locations, IoT Alerts, IoT Devices), Service

**Main Content:**

Hello, Kelly Warby.  
Welcome to Microsoft Dynamics 365 Field Service  
Streamline service delivery with next-generation tools for your frontline.

**Learn more about Field Service**

- Smarter Field Execution with Dynamics 365 Project Operations**  
Unifies service and project financials to simplify execution, improve accuracy, and increase visibility into costs and margins. [Learn more](#)
- Optimize schedules with the Scheduling Operations Agent**  
Quickly and easily optimize schedules for technicians as conditions change throughout the workday, significantly improving their productivity. [Learn more](#)
- Try Inspection Builder**  
Create inspection templates in Field Service using Copilot to convert uploaded PDFs and images of forms. [Learn more](#)

**Get up and running**

- Set up your users**  
Frontline workers are primarily scheduled for on-site jobs and use Dynamics 365 Field Service mobile. [Learn more](#)  
We have enabled Bing Maps for new organizations. [Set up](#) [Resources](#)
- Create your accounts**  
Service accounts represent who is receiving the on-site service and where the frontline worker will be dispatched. [Learn more](#)  
[Create](#) [Accounts](#)
- Create your work orders**  
Work orders define what work needs to be done, for whom, and where. [Learn more](#)  
[Create](#) [Work orders](#)
- Schedule your work orders**  
Book frontline workers who best match your work orders. [Learn more](#)

# Demonstration of Work Order to Service Order

**Dynamics 365** Field Service

00079 - Unsaved  
Work Order · Work Order (New)

12/05/2026 14:29 Created on  
Arcade Republic Service account

General Products and services Tasks Reference Timeline Related

**Details**

Company: 59640a26-2cd7-ef11-b8ec-7c1e5278e2b5

Status: **Unscheduled**

Priority: No priority

Service account: Arcade Republic

Work order type: Servicing and Routine Maintenance

External Project: ---

Incident type: Preventative Measures

Agreement: ---

Summary: ---

Integrate to Service: Yes

Account instructions: ---

Time from promised: dd/MM/yyyy

Time window start: ---

Timeline notes: ---

Location: ---

**Copilot**

Generate

**Booking suggestions**

| Technician       | Start Time        | End Time | Travel Time      | Action |
|------------------|-------------------|----------|------------------|--------|
| JT Jason Tromans | 12 May 2026 14:30 | 16:30    | 0min travel time | Book   |
| BH Ben Humphries | 12 May 2026 14:30 | 16:30    | 0min travel time | Book   |
| KW Kelly Warby   | 12 May 2026 19:49 | 21:49    | 0min travel time | Book   |

**Requirements**

2h duration

Find availability

**Contacts**

Reported by: ---

Account contacts are populated from the service account's primary contact

**Assets**

Primary asset: Arcades Synergy Media Coffee Table Arcade Machine

From products and services: Arcades Synergy Media Coffee Table Arcade Machine

From tasks: Arcades Synergy Media Coffee Table Arcade Machine

Thank you!



CRM

**connect**

FOR ALL THINGS DYNAMICS 365 CRM & POWER  
PLATFORM

