



FREE TICKETS,
LIMITED CAPACITY

DYNAMICS POWER! **CALGARY 365**

CALGARYS ANNUAL
BUSINESS APPLICATIONS
TECHNICAL CONFERENCE BY
365 SATURDAY

5 OCTOBER



365
Saturday



The background of the slide features a large satellite dish antenna in a field at sunset. The sky is a warm orange and yellow, and there are many smaller dishes visible in the distance.

Being Productive
with Dynamics
365 for Field
Service Mobile



Andrew Gingerich

- Owner of Analog IT Ltd
- Technology Consultant
- Working with Dynamics 365 since 2014



<https://www.linkedin.com/in/365ging/>
andrew@analogit.com



A large satellite dish antenna is silhouetted against a vibrant orange and yellow sunset sky. In the foreground, a dirt road leads towards the horizon where numerous smaller satellite dishes are visible, creating a sense of depth and technology.

Being Productive with Dynamics 365 for Field Service Mobile

Session Objectives & Agenda

- Dynamics 365 for Field Service and the Power Platform
 - Understanding the unique value of Field Service
 - How does Field Service Relate to the Power Platform
- Determining The Need
 - What questions to ask from a high level
- Setting up for Success
 - Key components to setup to give field technicians the best experience
- The Mobile Part of Field Service
 - Field Service Workflow
 - Dynamics 365 for Field Service Mobile (Demo)

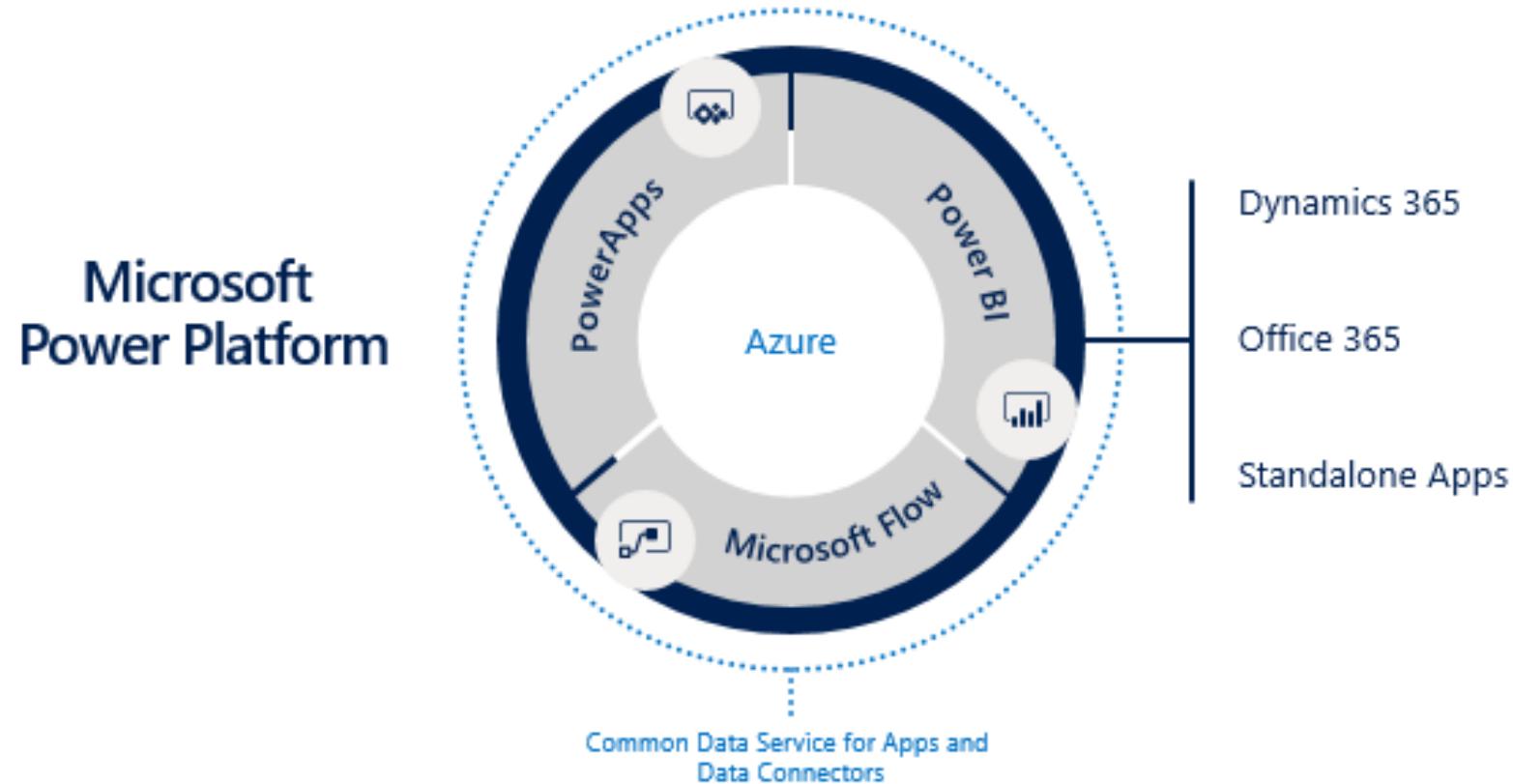
Session Objectives & Agenda

- The Mobile Configuration Tool (Woodford)
 - High level overview
 - Demo
- Integration with the wider Power Platform
- Q & A



Dynamics 365 for Field Service and the Power Platform

Microsoft Business Applications



Microsoft Business Applications



PowerApps

Model Driven | Canvas

*Internal built apps
ISV Partner Solutions*

Flow



PowerBi



Connectors



Dynamics 365

Microsoft 1st Party Apps

Dynamics 365 for Sales

Dynamics 365 for Customer Service

Dynamics 365 for Field Service

Dynamics 365 Project Service

Dynamics 365 for Marketing

Dynamics 365 for Talent

Dynamics 365 for Retail

Business Central

Dynamics 365 Finance & Operations

Common Data Service for Apps

Common Data Model | Entities | Metadata | Relational Database

Microsoft Azure

Dynamics 365 for Field Service - Key Features

Work Order

Primary Entity that is scheduled.

Universal Resource Scheduling

Schedule Any Entity

Field Service Mobile App

iOS / Android / Windows

Resources

People / Teams / Rooms / Equipment / Skills / Certifications

Products & Services

Purchase Orders / Warehouses / Inventory

IOT

Azure IOT Hub / Azure IOT Central

Agreements

Service Contracts with auto workorder creation

Shared Resources

Dynamics 365 Project Service

Resource Scheduling Optimization

RSO

Incident Types

Bundled services, tasks and products for fast Workorder creation

Invoicing / Time Entries / Actuals

Transactional data ready to integrate to ERP

Extends Dynamics 365

DYN365 for Sales and Customer Service

A silhouette of a large satellite dish antenna against a vibrant orange and yellow sunset sky. In the foreground, a dirt road leads towards the horizon where many other similar antennas are visible.

Determining the Need

Configure before Customize



- Understanding how to effectively configure Dynamics 365 for Field Service is the key
- Gathering Critical information:
 - General Business / Product & Service Delivery
 - Resources
 - Work Order Considerations
- Knowing how to configure to achieve the outcome

Gathering Information

General Business and Service Delivery

- Locations
- Transacting Currencies (Base Currency)
- Detailed information about Products and Services
- Inventory Tracking?
- Maintenance Contracts?
- Where is the Inventory?
- % of service request solved by phone / email
- IOT need



Gathering Information



Work Order Considerations – Define the work required using:

- Tasks
- Services
- Products
- Other instructions and data about the work
- Preferred Resources
- Required Skill Set / Certification / Proficiency
- Incident Types

Gathering Information

Bookable Resources

- Number of technicians
- Work Hours
- Where do technicians start their day
- How to handle time off requests
- Resources time zone
- Skills, Certification, Proficiency
- Hourly Rate



Gathering Information

Resources

- How are they booked as:
 - Individuals
 - Teams
 - Equipment / Tools
 - Space
 - Resource Capacity pool



Forms Pro Example



A silhouette of a large satellite dish antenna against a vibrant orange and yellow sunset sky. In the foreground, a dirt road leads towards the horizon where many other similar antennas are silhouetted against the bright sky.

Setting up for Success

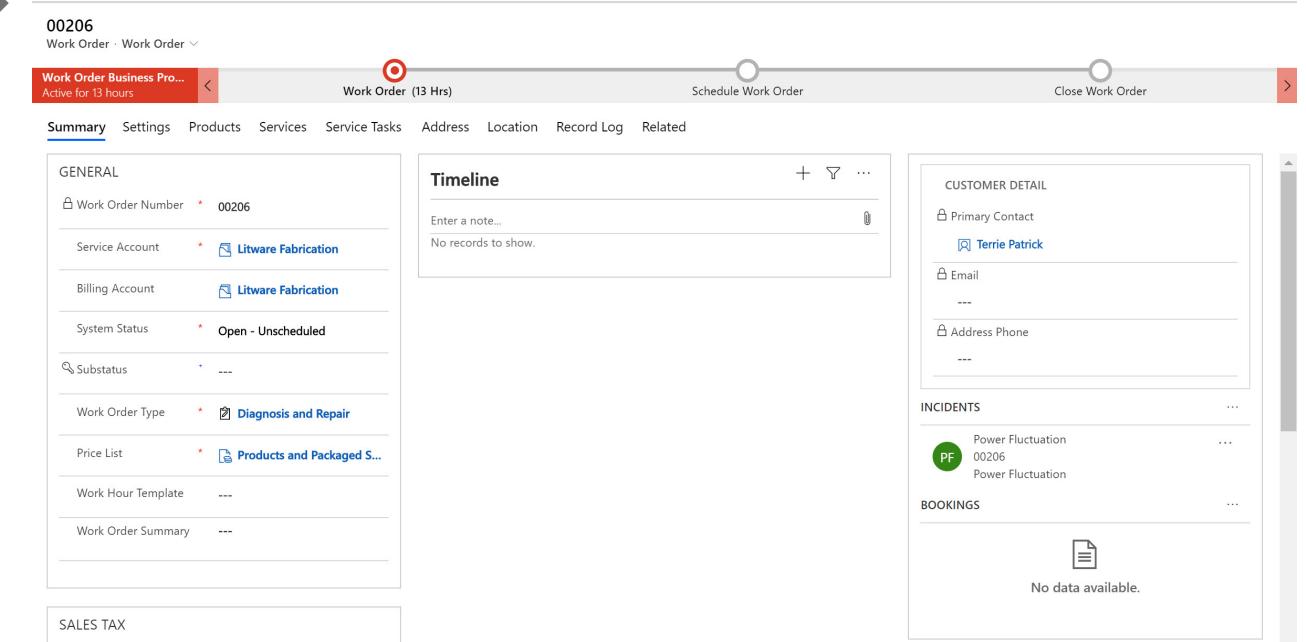
Field Service Mobile (Demo)

Demo

A wide-angle photograph of a large array of satellite dishes, likely the Very Large Array in New Mexico, silhouetted against a vibrant orange and yellow sunset sky. A dirt road leads towards the dish in the foreground.

The Mobile Part
of Field Service

Microsoft Business Applications



Dynamics 365 Saturday | Power Platform Saturday Calgary

Microsoft Business Applications



Hourly view

Filter & Map View

Brady Hannon 0:00 0%
David So 2:30 6%
Edgar Doming... 0:00 0%
Efrain Schreiner 0:00 0%

Tuesday - 10/1/2019

Work Order - 00223 Duration: 2 hrs 30 min

Bing

Open Requirements Unscheduled Service Activities Project Unscheduled Work Orders

Name	From Date	To Date	Duration	Proposed Due	Fulfilled Duration	Remaining Duration	Priority	Territory	Time From Promised	Time To Promised	Status	Created On
00218	08/09/2018	08/12/2018	2 hrs	0 min	2 hrs	WA	Active	09/30/2019 8:33 PM				
00224	08/09/2018	08/12/2018	3 hrs	0 min	3 hrs	WA	Active	09/30/2019 8:33 PM				
00330			6 hrs 45 min	5 hrs 3 min	1 hr 42 min	FL	Active	09/30/2019 8:33 PM				
00213	08/09/2018	08/12/2018	2 hrs	0 min	2 hrs	WA	Active	09/30/2019 8:33 PM				

Dynamics 365 Saturday | Power Platform Saturday Calgary

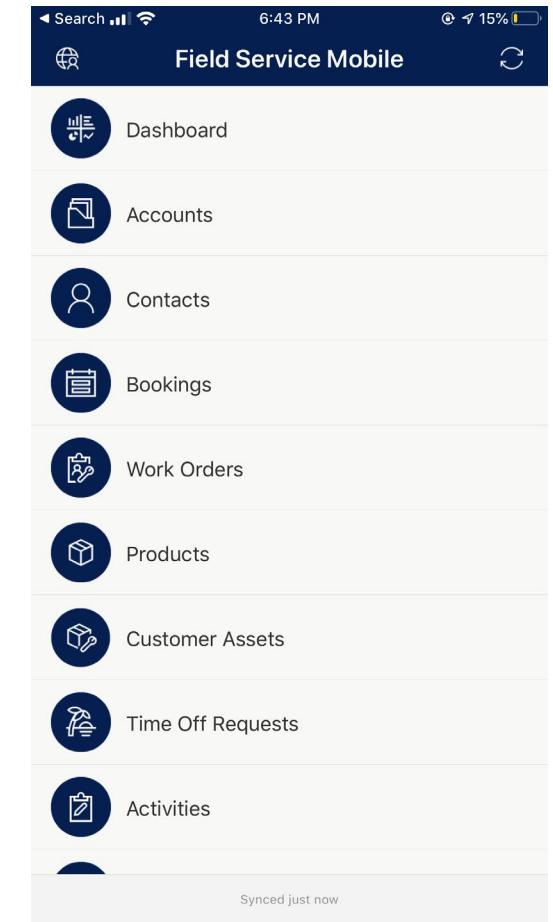
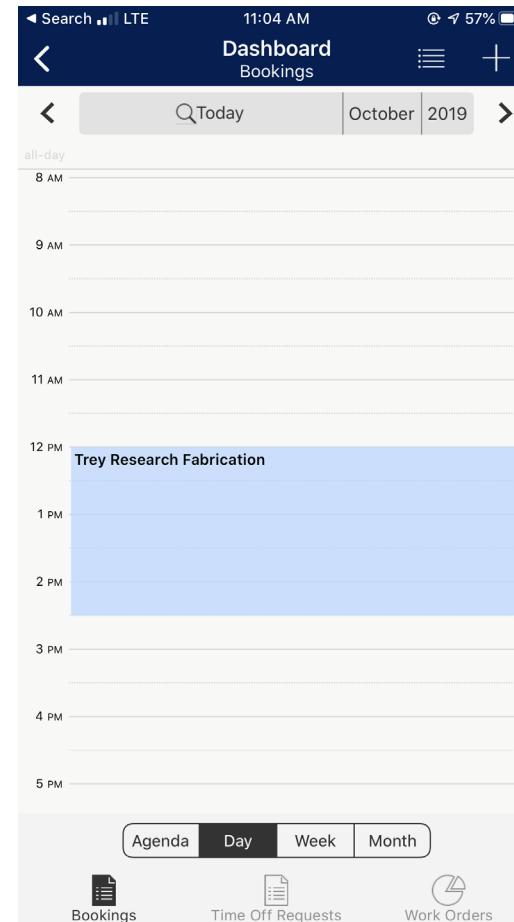
Microsoft Business Applications

Work Order Generation

Schedule & Dispatch

Service Delivery

Review & Bill



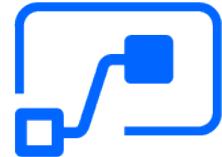
Field Service Mobile (Demo)

Demo

A silhouette of a large satellite dish array, likely the Very Large Array, against a vibrant orange and yellow sunset sky. The foreground shows a dirt road leading towards the dish. Several other smaller dishes are visible in the background across a field.

Extending Field Service with the Power Platform

Integrating the Power Platform



Active - Pending Approval ▾

Search for records

✓	Created On	Project Nu...	(LEGACY) Contract...	Status Reason	Filename	Sender	Owner	Approver	Class	Division																			
✓	10/1/2019 10:25 AM	1801-011097	---	Requires Approval	20191001090653783.pdf				Envelope	EREC																			
	10/1/2019 10:21 AM	1801-011097	---	Requires Approval	1910-115486.pdf				---	EREC																			
	10/1/2019 9:51 AM	1901-012397	---	Requires Approval	Inv_761431_31831334.pdf				---	EREC																			
	10/1/2019 9:08 AM	1901-012087	---	Requires Approval	epic - 5681.pdf				---	EREC																			
	10/1/2019 8:49 AM	1801-011480	---	Requires Approval	INVOICE_69213-0.pdf				---	EREC																			
	10/1/2019 8:44 AM	1801-011480	---	Requires Approval	Inv54957954_.pdf				---	EREC																			
	10/1/2019 8:21 AM	1901-012161	---	Requires Approval	eReceipt.pdf				---	EREC																			
	10/1/2019 8:19 AM	1801-011759	---	Requires Approval	invoice_310.pdf				---	EREC																			
	10/1/2019 8:17 AM	1901-012366	---	Requires Approval	eReceipt.pdf				---	EREC																			
	10/1/2019 8:14 AM	1901-012314	---	Requires Approval	eReceipt.pdf				---	EREC																			
	10/1/2019 7:28 AM	1801-011097	---	Requires Approval	Invoice IN0000118563.pdf				---	EREC																			
	10/1/2019 6:57 AM	---	---	Requires Approval	IE2019019145.pdf				---	EREC																			
	10/1/2019 1:53 AM	---	---	Requires Approval	beaconroofingca_007359_20191001_				Service	EREC																			
	9/30/2019 4:14 PM	1801-011097	---	Requires Approval	InvoiceAndContract.pdf				Envelope	EREC																			
	9/30/2019 3:43 PM	---	---	Requires Approval	eReceipt.pdf				Service	EREC																			
All	#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z		
1 - 50 of 121 (1 selected)																													

Integrating the Power Platform

Model Driven Powerapp



APPROVAL
20191001090653783.pdf

Owner * Approval Number
Approval-001241

General Related

Filename 20191001090653783.pdf

Approval Type Project Contract

Project Contract Number

(LEGACY) Contract / Project Name ---

Vendor

Customer ---

Project Number 1801-011097

Invoice Date 10/1/2019

Due Date ---

Modified By

Exchange Rate 1.000000000

Internal PO Number ---

Approver

Document Status Requires Approval

Approval Batch ---

Division

Timeline

Enter a note...
No records to show.

TO: FROM: BRANCH #: EXTENSION: October 1st 2019
Date

INVOICE NUMBER 12135340-0001 DRB DATE 8/27/19 CUSTOMER NAME ACCOUNT NUMBER DISPUTED AMOUNT

DISPUTE/COMMENTS (MANDATORY)

ORIGINAL CHARGES CREDITS NEW CHARGES

A screenshot of a Microsoft Dynamics 365 approval form. The top section shows basic document metadata: 'APPROVAL' and '20191001090653783.pdf'. To the right, the 'Owner' field is populated with 'Approval-001241'. Below this is a 'General' tab with various fields like 'Filename', 'Approval Type' (set to 'Project Contract'), and 'Project Contract Number'. A large central area contains a blurred preview of a document, likely a PDF, showing fields such as 'TO:', 'FROM:', 'BRANCH #:', 'EXTENSION:', and dates like 'October 1st 2019'. At the bottom of the document preview, there are sections for 'INVOICE NUMBER', 'DRB DATE', 'CUSTOMER NAME', 'ACCOUNT NUMBER', and 'DISPUTED AMOUNT', each with a corresponding input field. Below the document preview, there are buttons for 'ORIGINAL CHARGES', 'CREDITS', and 'NEW CHARGES'.

Integrating the Power Platform

Model Driven
Powerapp



IT Support

Accounts Payable - Vendor Invoice Approvals

Search 1 / 1

eReceipt.pdf
Home Depot Credit Services
September 20, 2019

September 20, 2019

More saving.
More doing.SM
1818 16TH AVE, NW CALGARY, AB T2M 0L8
GERALD MONTGOMERY (403)284-7925

Entries must be completed within 14 days of purchase. Entrants must be 18 or older to enter. See complete rules on website. No purchase necessary.
(Le sondage est également offert en français sur le Web.)

eReceipt.pdf
Home Depot Credit Services

Division
Class
Project Number
Project/Contract Name
Project / Contract Name
GL Type
Internal PO
InternalPO
Notes (optional)

Approve Reject

Integrating the Power Platform

Dynamics 365

- Project Contract
- Work Order

The screenshot shows a Dynamics 365 Work Order record. At the top, there's a navigation bar with tabs: ORDER (highlighted), Summary, Project Site Address, Contract Performance, Project Price Lists, Contract Lines, AP Approvals (which is underlined and highlighted in blue), and Related. Below the navigation, the work order details are shown: Total Amount (\$0.00), Status (Draft), Status Reason (In review), and Owner (a blurred user profile). A large callout box highlights the 'AP Approvals' section. This section is titled 'Related Approval Totals' and lists four categories: Not Assigned (\$0.00), To Be Approved (\$0.00), Approved (No GST) (\$0.00), and Paid (No GST) (\$0.00). Each category includes a 'Last updated' timestamp: 10/3/2019 11:59 PM.

Category	Amount
Not Assigned	\$0.00
To Be Approved	\$0.00
Approved (No GST)	\$0.00
Paid (No GST)	\$0.00

A silhouette of a large satellite dish against a vibrant orange sunset sky. In the foreground, a dirt road leads towards the horizon where many other similar dishes are visible.

Summary

Resources

- [docs.microsoft.com](https://docs.microsoft.com/en-us/dynamics365/field-service/user-guide)
 - Getting Started with Field Service - <https://docs.microsoft.com/en-us/dynamics365/field-service/user-guide>
 - Learn at your own pace - <https://docs.microsoft.com/en-us/learn/browse/?products=dynamics-field-service>
- Blogs
 - <https://community.dynamics.com/365/fieldservice/b>
 - The Weekly Dispatch -
<https://www.youtube.com/watch?v=M2krVz6nYGw&list=PLVfLMM2Wnmx0ZGTNbUe71rh7lamFdqZeC>
- Woodford Guide - <https://www.resco.net/support/guides/woodford/>

A silhouette of a large satellite dish antenna against a vibrant orange and yellow sunset sky. In the foreground, a dirt road leads towards the horizon where many other similar antennas are visible.

Q&A

Overall Event Feedback



Agenda

Time	Room 1	Room 2
09:00 – 10:00		Keynote – Matthew Mead
10:10 – 11:10	Empower! Improving business processes with the Power Platform – Victor Dantas	Getting started with PowerApps Component Framework (PCF) – Alex Shlega
11:15 – 12:15	Enterprise CRM Implementation – An Analyst's perspective – Lyndsay Kowalick	Get started with Dynamics 365 Virtual Agent for Customer Service – Dhina Gajavarathan
12:15 – 1:00		Lunch Break
1:00 – 2:00	Setting up Continuous Integration (CI) and Continuous Delivery (CD) for PowerApps/D365 CE – Alex Shlega	Dynamics 365 Data Migration Demystified – Kunal Tripathy
2:10 – 3:10	PowerApps Lab – 365 Saturday Team	Getting the Most Out of the Field Service Mobile App – Andrew Gingerich
3:15 – 4:00		Close & Swag