

# Enhance your business with Dynamics 365 Field Service

# On today's call



PRIYANKA KOUSHIK



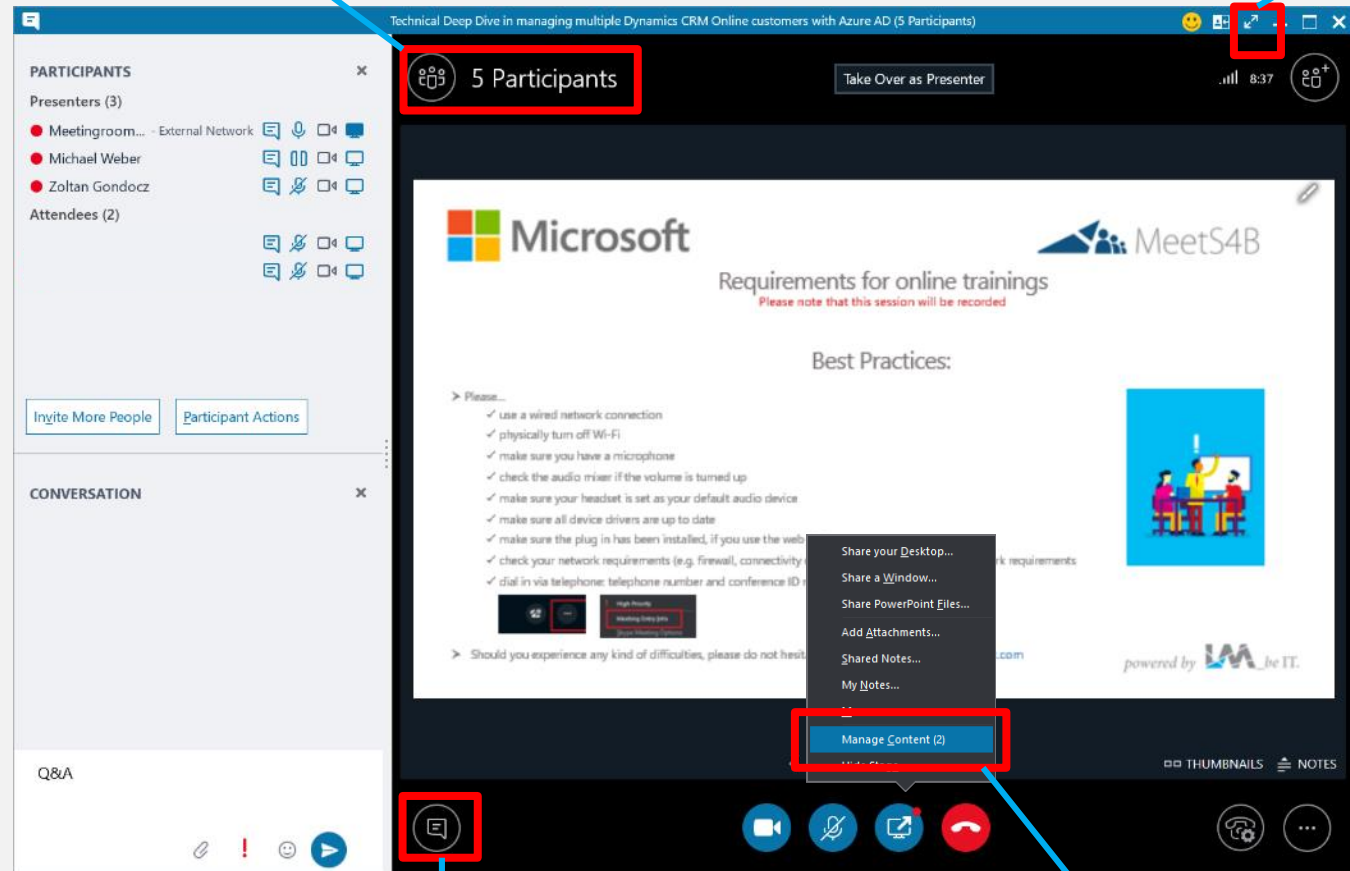
TEJASWINI RADHAKRISHNAN

# Webinar technology: Skype for Business

Presenters & Participants

Full screen

Any technical issues:  
[weregsup@microsoft.com](mailto:weregsup@microsoft.com)



Ask your question in the chat

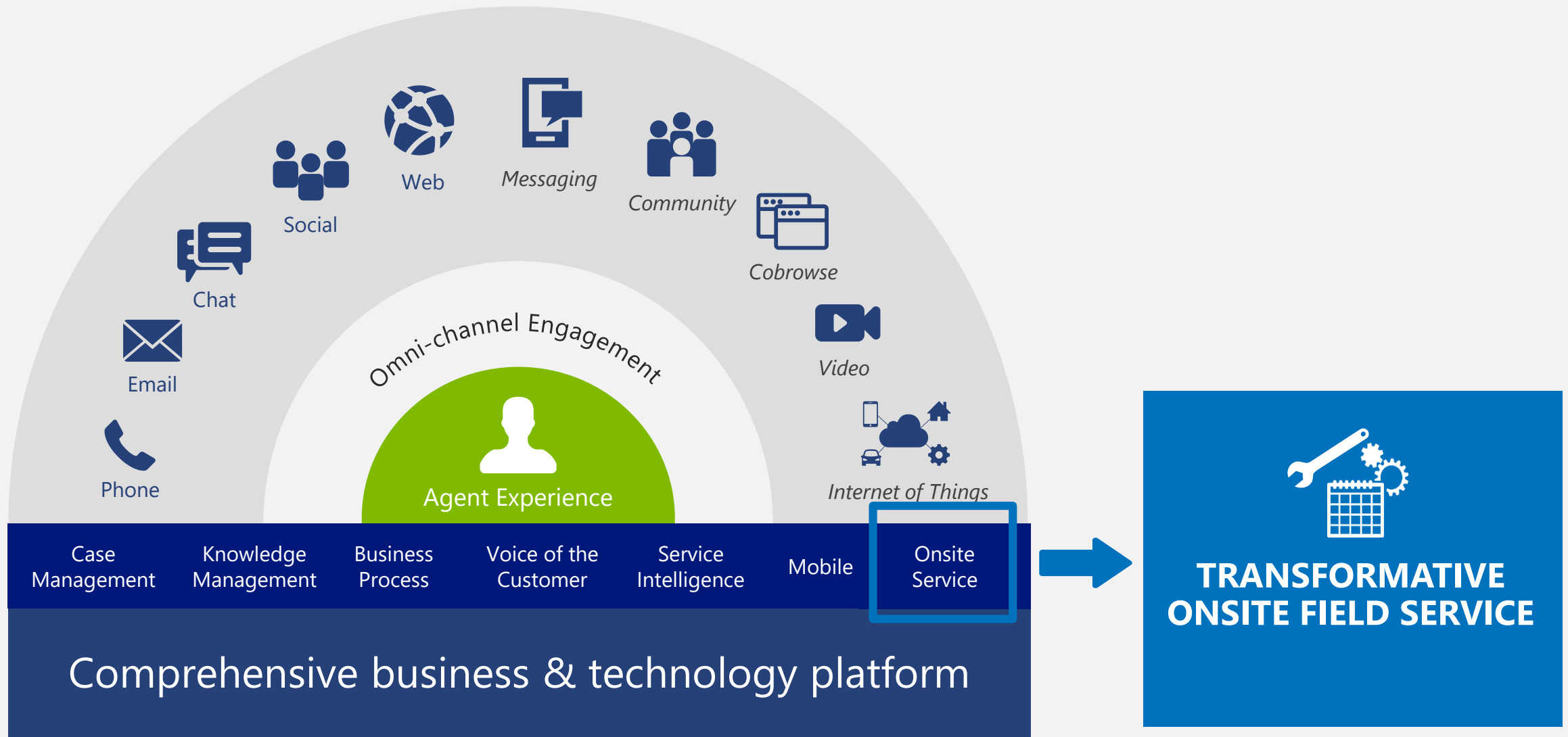
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# Agenda

- Introduction
- Generalized Concepts
- Demonstration
- Integrations and Extensions
- Concluding remarks
- Questions and Answers

# Introduction

# What is Field Service Management?



# What's top of mind for Field Service leaders

- Customer First
- Connected Interactions
- Empower organizations

1. "Shifting the Loyalty Curve" Mitigating Disloyalty by Reducing Customer Effort by the Corporate Executive Board (CEB), 2009
2. Kate Leggett, The Mandate for Intelligent Customer Service, a commissioned study conducted by Forrester Consulting on behalf of Microsoft, December 2015
3. 2016 State of Global Customer Service Report



**91%** of consumers are loyal to brands who offer low effort interactions.<sup>1</sup>

Only **4%** of service orgs can solve a service inquiry using a single application.<sup>2</sup>

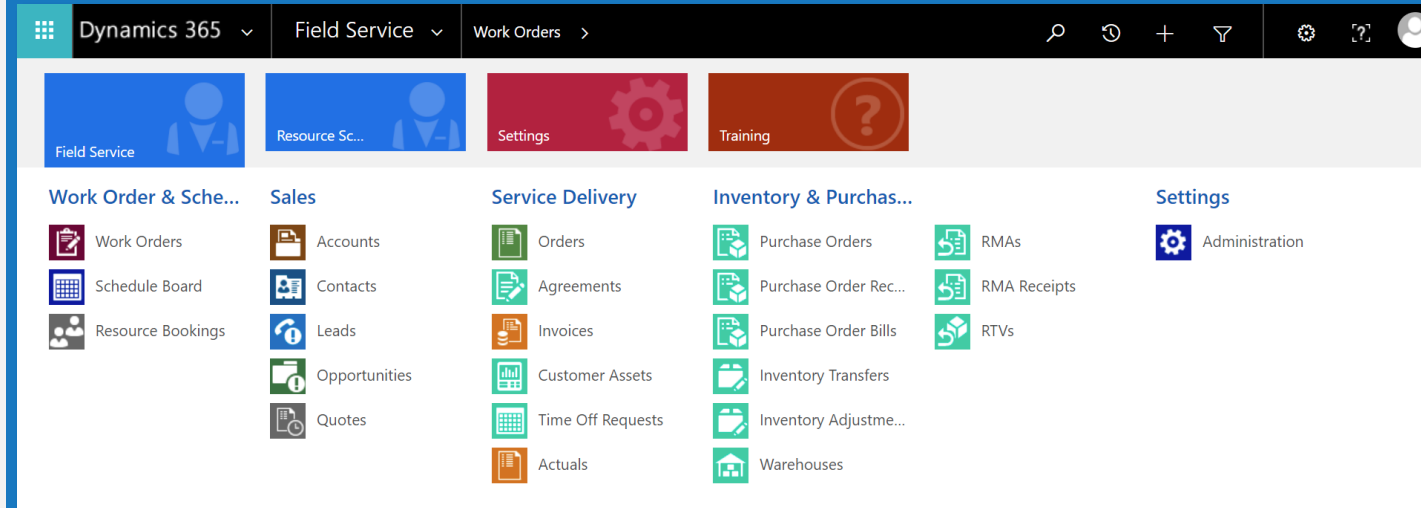
**77%** of consumers around the globe have a more favorable view of brands that offer proactive customer service notifications.<sup>3</sup>

# Generalized Concepts of Field Service

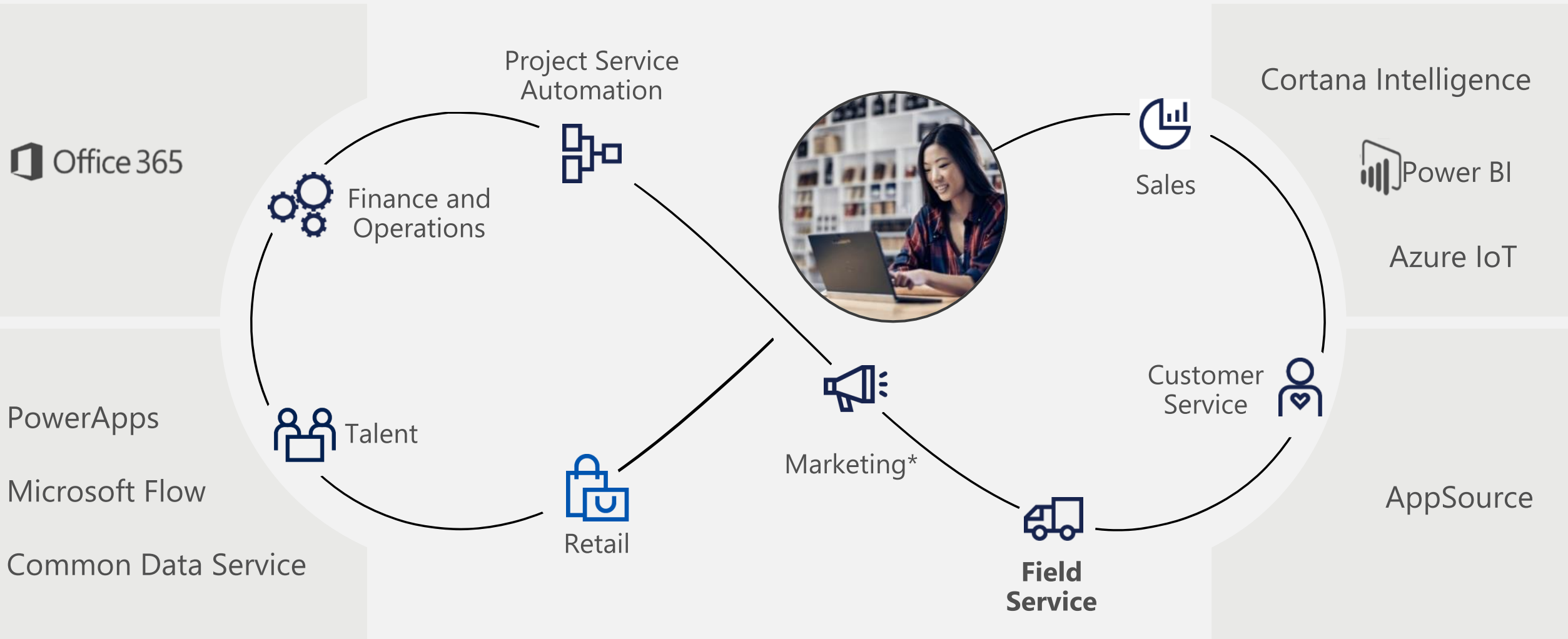


# Microsoft Dynamics 365 for Field Service Capabilities

- Built on top of Microsoft Dynamics 365
- Native Mobile Application & Field Resource Hub
- Schedule and Dispatch Optimization (Universal Resource Scheduling)
- Integration with Office 365 & Microsoft Azure



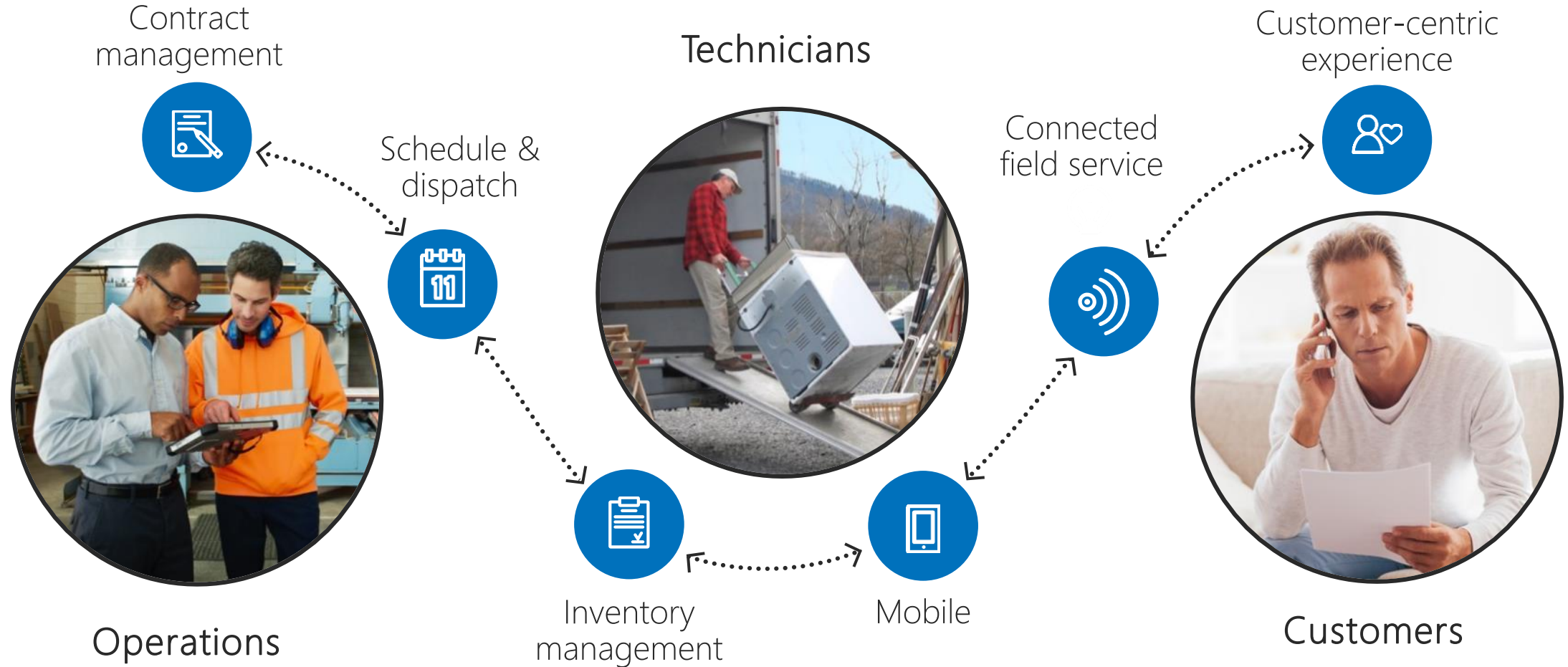
# Positioning Microsoft Dynamics 365



\*Brought to you by Adobe Marketing Cloud

# Microsoft Dynamics 365 for Field Service Process

## Master the service call



# Different User Roles of Field Service

User accounts and security roles

- CSR Agent
- Dispatcher
- Field Technician
- Inventory Manager
- Field Manager

# Work Order Creation

Can be created **manually**

Directly from a **case** or an **opportunity**....

... received via a **Portal**

**Automatically** generated based on an Agreement or device

The screenshot shows the Dynamics 365 Field Service interface for creating a work order. The top navigation bar includes 'Dynamics 365', 'Field Service', and 'Work Orders > 00031'. Below the navigation bar, there's a 'WORK ORDER' header with the number '00031'. A progress bar at the top indicates the work order is 'Active for 2 hours' and shows steps: 'Schedule Work Order' (current) and 'Close Work Order'. Below the progress bar, there are fields for 'Service Account' (Woodgrove Medical Sys), 'Billing Account' (Woodgrove Medical Systems), 'Primary Incident Type' (MRI Inspection), 'Priority' (click to enter), 'Work Order Type' (Inspection), and 'Inspection' (click to enter). A 'Work Order Business Process (Active for 2 hours)' section shows 'Next Stage' as a green circle. The main content area is divided into three sections: 'Summary', 'ACTIVITIES', and 'NOTES'. The 'Summary' section includes a 'GENERAL' tab with fields for 'Work Order Number' (00031), 'Service Account' (Woodgrove Medical Systems), 'Billing Account' (Woodgrove Medical Systems), 'System Status' (Open - In Progress), 'Sub-Status', and 'Work Order Summary'. Below this is a 'PRIMARY INCIDENT' section with fields for 'Primary Incident Type' (MRI Inspection), 'Primary Incident Description', 'Primary Incident Estimated Duration', and 'Primary Incident Customer Asset'. At the bottom of the summary is a 'TOTAL' section. The 'ACTIVITIES' section is currently empty, showing a message: 'There aren't any activity records to show. To get started, create an activity like a phone call, task, email, or appointment.' The 'NOTES' section is also empty. On the right side, there are two sections: 'CUSTOMER DETAIL' with fields for 'Primary Contact', 'Email', and 'Address Phone', and 'INCIDENTS' with a table showing incident details. Below the incidents is a 'BOOKINGS' section with a table showing booking details. The bottom of the interface shows the 'System Status' (Open - In Progress), 'Sub-Status', 'Owner' (Alex Dan), and 'Active' status.

Work Order  
Creation

Schedule  
and  
Dispatch

Service  
Delivery

Review and  
Approval

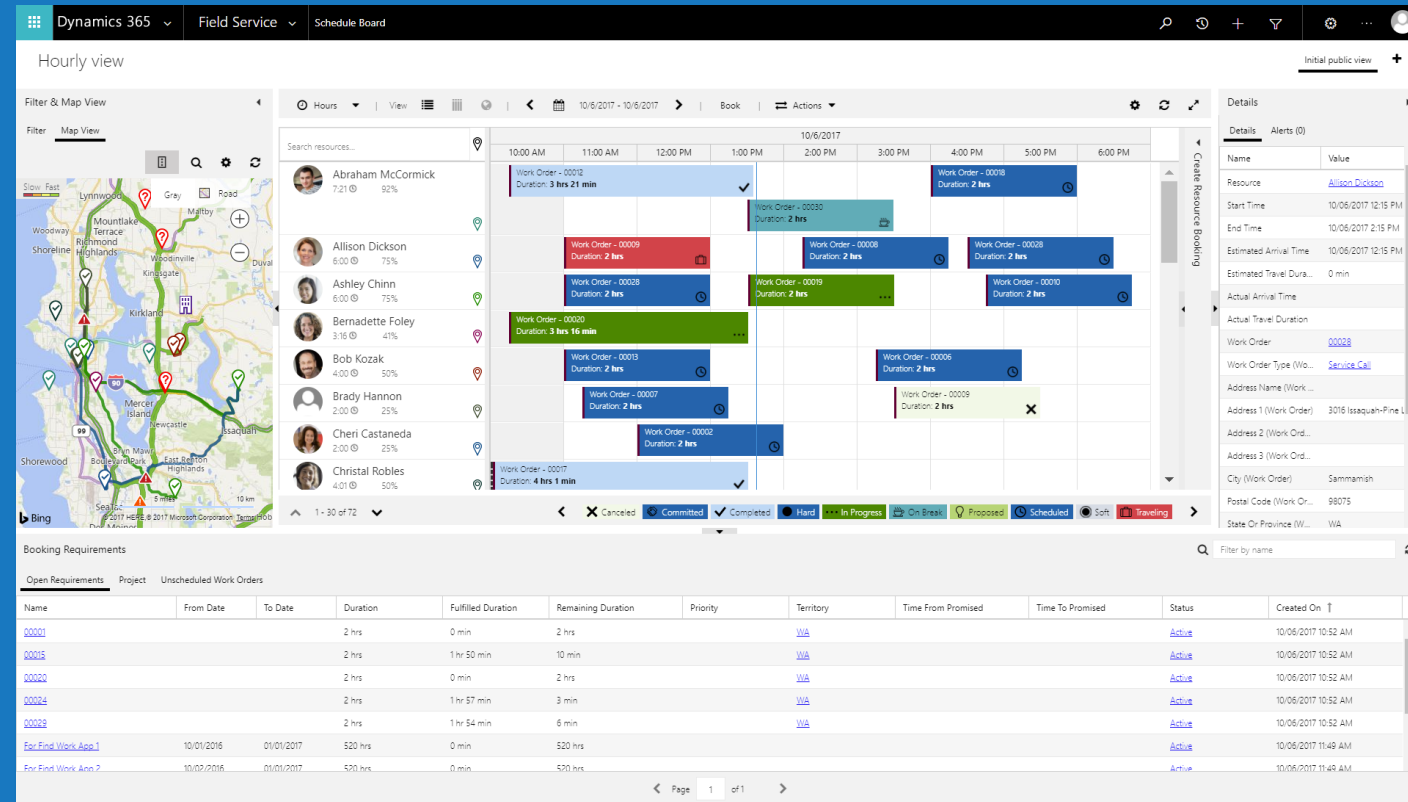
Generate  
Invoice

# Scheduling & Dispatching

Each dispatcher gets his/her own schedule board tab

Identify and organize available resources

Be smart about Schedule Status colors



Work Order  
Creation

Schedule  
and  
Dispatch

Service  
Delivery

Review and  
Approval

Generate  
Invoice

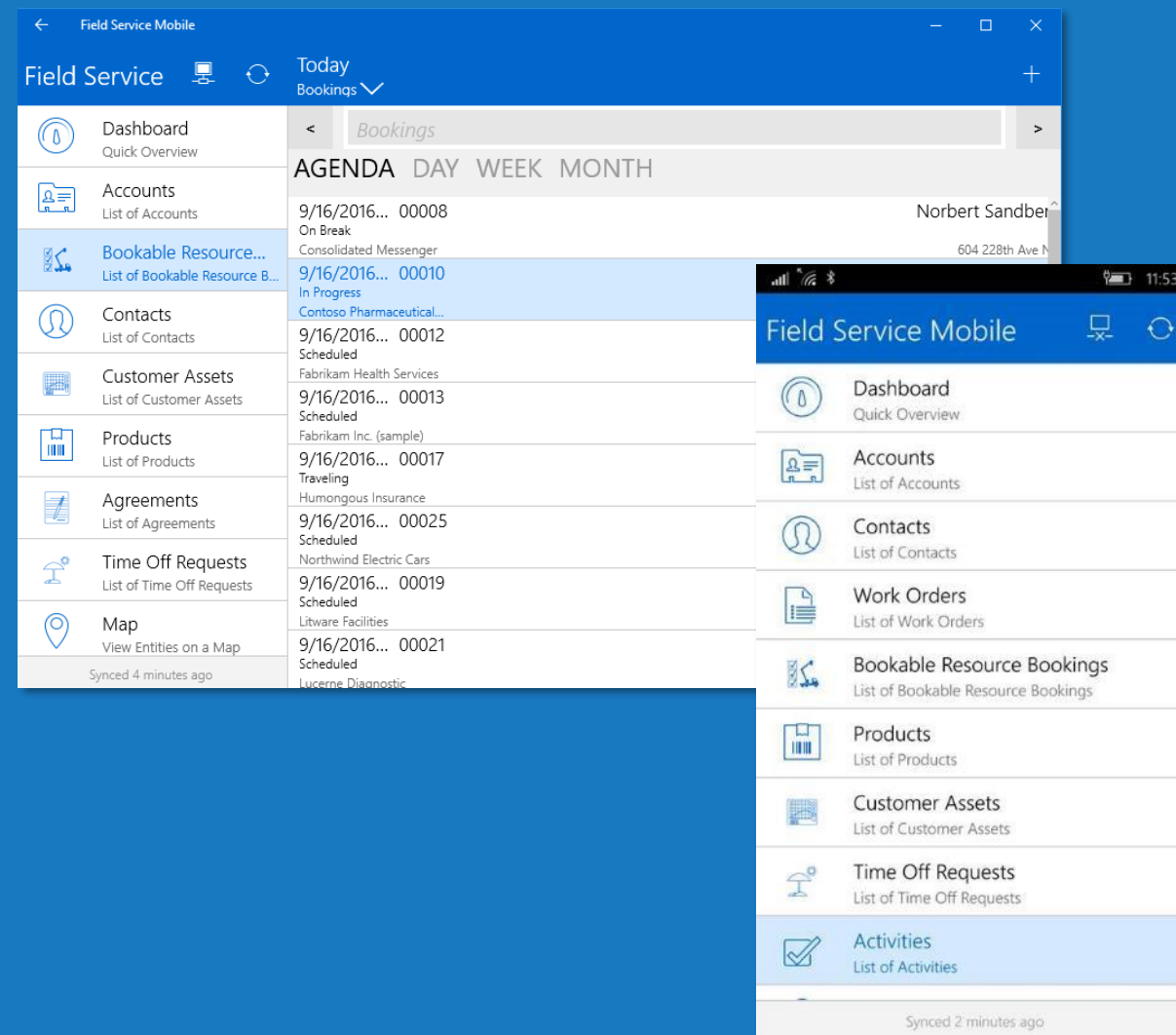
# Service Delivery

Complete customer insights

Real-time guidance

Work Order completion

Plan the next actions & tasks



Work Order  
Creation

Schedule  
and  
Dispatch

Service  
Delivery

Review and  
Approval

Generate  
Invoice

# Review & Approval

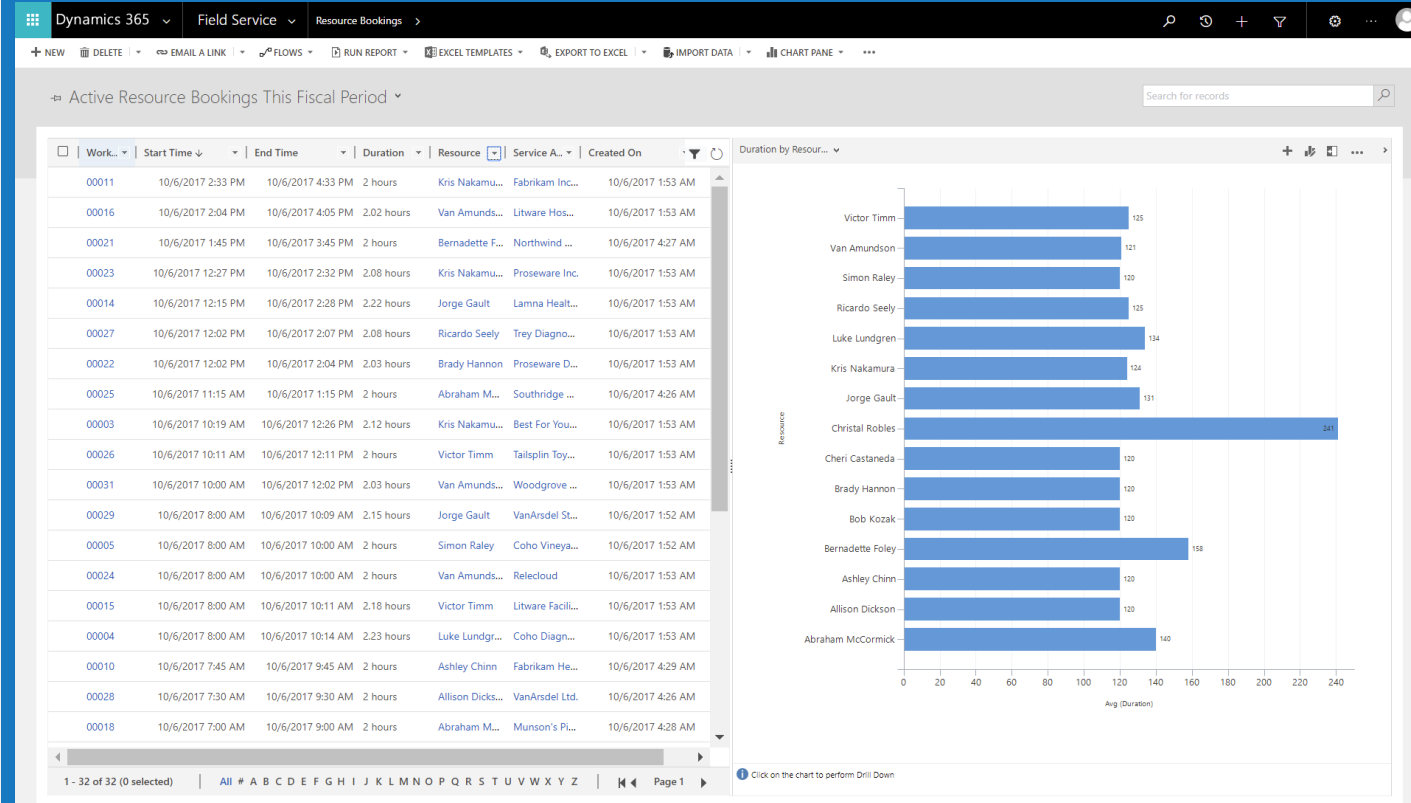
Verify & Review

Close the Work Order

Invoicing & Billing

Reporting & Analytics

Feedback and Follow-up



Work Order  
Creation

Schedule  
and  
Dispatch

Service  
Delivery

Review and  
Approval

Generate  
Invoice



# Generate Invoice

On closure of Work Order, invoice generation takes place

Any used products or services are added as line items on the invoice

Final review can be done on invoice before confirming

Invoice comprises travel time costs, if any

The screenshot displays the Dynamics 365 Field Service Invoices interface. The top navigation bar shows 'Dynamics 365' and 'Field Service'. The main header indicates the invoice is a 'PROJECT INVOICE' for 'CRM Implementation for Chic - NA'. The total amount is \$104,400.00, and the status is 'Active'. The project invoice status is 'Draft', and the owner is 'Alex Dan'.

The invoice process flow is shown as 'Draft (Active for 2 hours)' → 'In Review' → 'Sent'. The contract is 'CRM Implementation fo'.

The 'Summary' section includes the following details:

- Invoice ID: INV-01000-H8N2B2
- Name: CRM Implementation for Chic - NA
- Currency: US Dollar
- Price List: US Bill Rates 2016
- Payment Terms: Net 30
- Bill To Address: 90025 Sterling St, Irving, TX 75061, USA
- Opportunity: CRM Implementation for Chic - NA Opp
- Contract: CRM Implementation for Chic - NA
- Customer: Chic Department Stores
- Description: Won, Assuming we perform the work offshore

The 'Project-based Lines' section shows a table with columns: Write-In Product, Project, Billing Method, Contract Line Amount, Amount Previously..., and Amount. It indicates 'No Invoice Lines found for this invoice. Select Add (+)'.

The 'PRODUCTS' section shows a table with columns: Product Name, Delivered On, Quantity, Unit, Price Per Unit, and Extended Amount.

Product Name	Delivered On	Quantity	Unit	Price Per Unit	Extended Amount
CRM 3-Year Basic	10/5/2017	50.00000		\$1,800.00	\$90,000.00
CRM 3-Year Professi...	10/6/2017	10.00000		\$1,440.00	\$14,400.00

The 'Detail Amount' section shows the total amount of \$104,400.00. The 'Pre-Freight Amount' is also \$104,400.00.

Work Order  
Creation

Schedule  
and  
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Service  
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Review and  
Approval

Generate  
Invoice

# Field Resource Hub

Available anywhere on any device

Built on the Unified Interface framework

Responsive optimal viewing UI

Access: MyApps & Dynamics 365 mobile app

[Field Resource Hub User's Guide](#)



The screenshot displays the Dynamics 365 Field Resource Hub interface. The main window shows a table titled "Active Resource Bookings (Field Service Information)". The table has columns for Name, Work Order, Start Time, End Time, and Duration. The data is organized into rows, with some rows grouped under "Website Project 1 - Architect" and "Website Project 1 - Program ...".

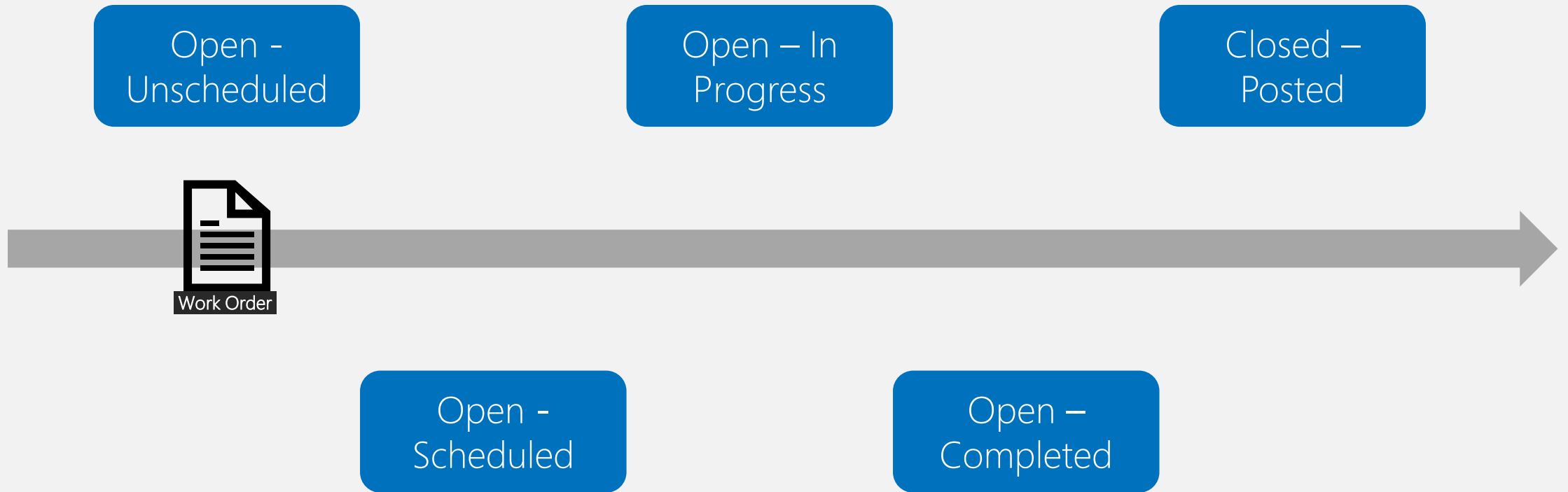
Below the table, there is a summary bar indicating "1 - 39 of 39 (0 selected)".

On the right side, there is a panel titled "Active Work Or..." with a search bar. Below the search bar, there is a list of work orders, each with a colored circle icon and a text description:

- 00031 Woodgrove Medical Systems Open - In Progress
- 00029 VanArsdel Storage Open - In Progress
- 00030 Wingtip Toys Facilities Open - In Progress
- 00028 VanArsdel Ltd. Open - Scheduled
- 00026 Tailsplin Toys Storage Facility Open - Scheduled
- 00027 Trey Diagnostic Open - Scheduled

At the bottom of the panel, there is a tab labeled "ABC".

# States of a Work Order in Field Service



# New Functionality

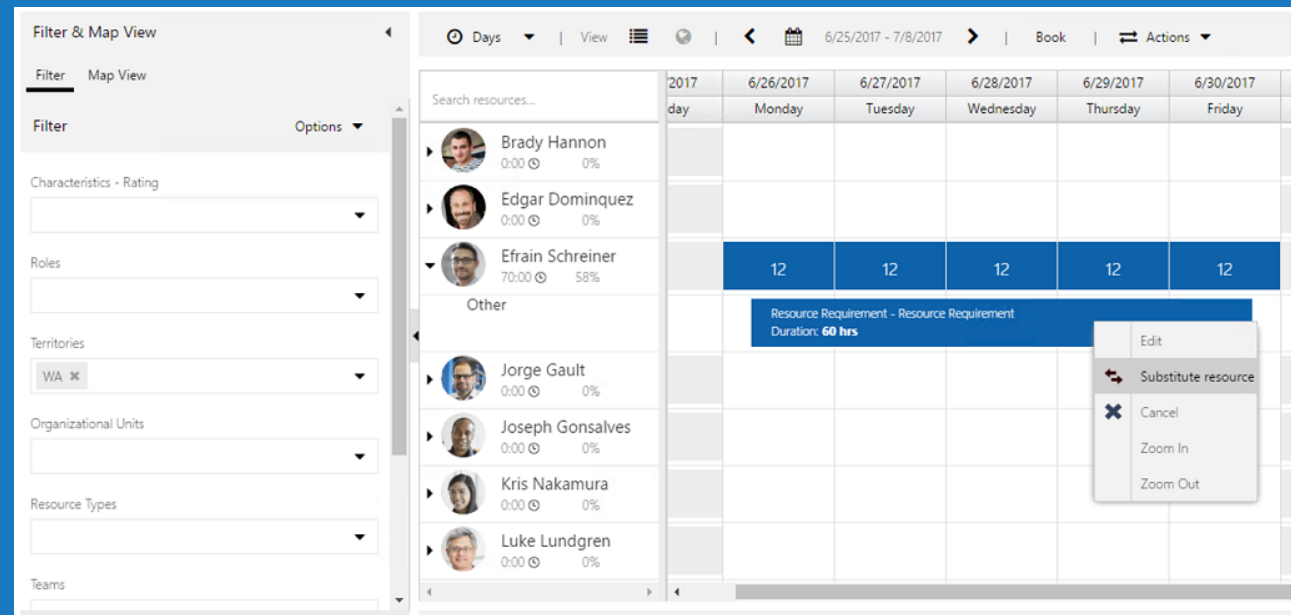
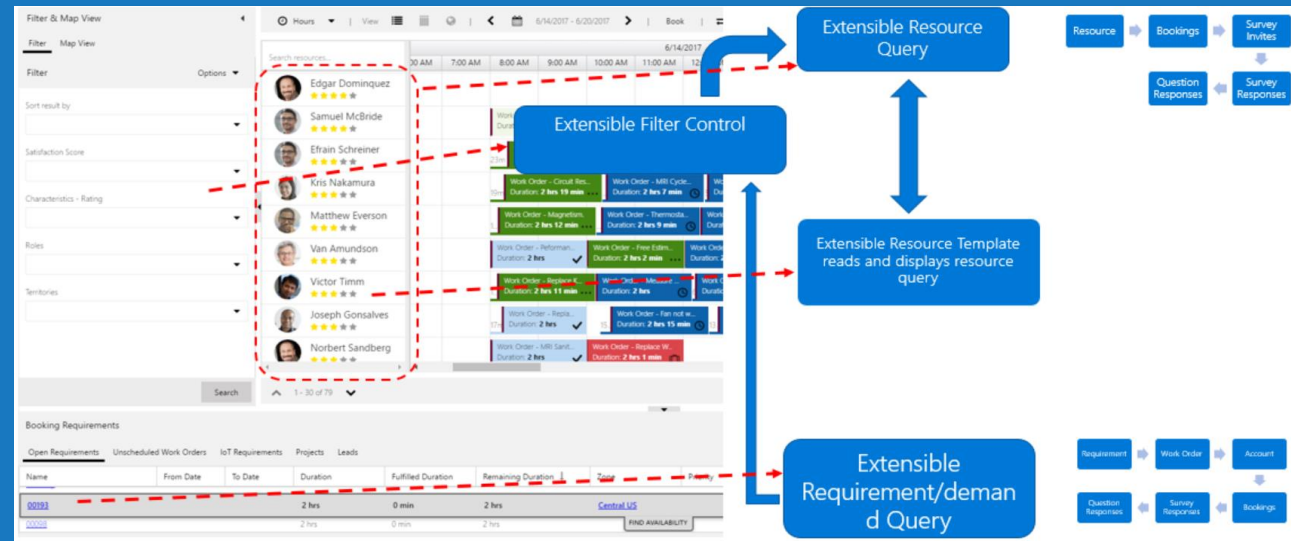
## Dynamics 365 July 2017 Update

Extensibility for Schedule Board

Productivity features

Resource Scheduling Optimization

Connected Field Service



[What's new in the July 2017 update for Field Service](#)




# Demonstration

# Demo Field Service

Try Field Service now!

AppSource
Apps
Partners
List on AppSource
Blog
How it works >

Apps > Dynamics 365 for Field Service



**Dynamics 365 for Field Service**  
Microsoft

Field service capabilities help organizations deliver to customers outstanding onsite service

FREE TRIAL

Products  
Dynamics 365 for Field Service

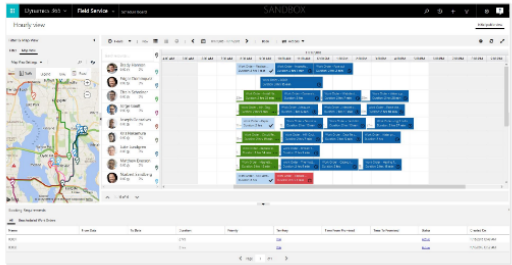
Publisher  
Microsoft


Version  
6.1.0.0

Updated  
11/29/2016

Categories

- Characteristics and proficiency ratings:** You can define proficiency and competency levels and set them as requirements for a work order. Proficiency and competency levels are also part of the worker profile, so you can make an appropriate match when scheduling resources.
- Detached schedule support:** Field Service now supports time allocation outside of a work order. For example, a field tech can schedule time for lunch or supply provisioning without having to associate that time with an empty work order.
- Shared resources across Project Service and Field Service:** Field Service and Project Service share a resource pool, with resource schedules appearing in both.
- Out-of-the-box business process:** A firm handshake between CRM incident management and work orders creates an alignment between these two

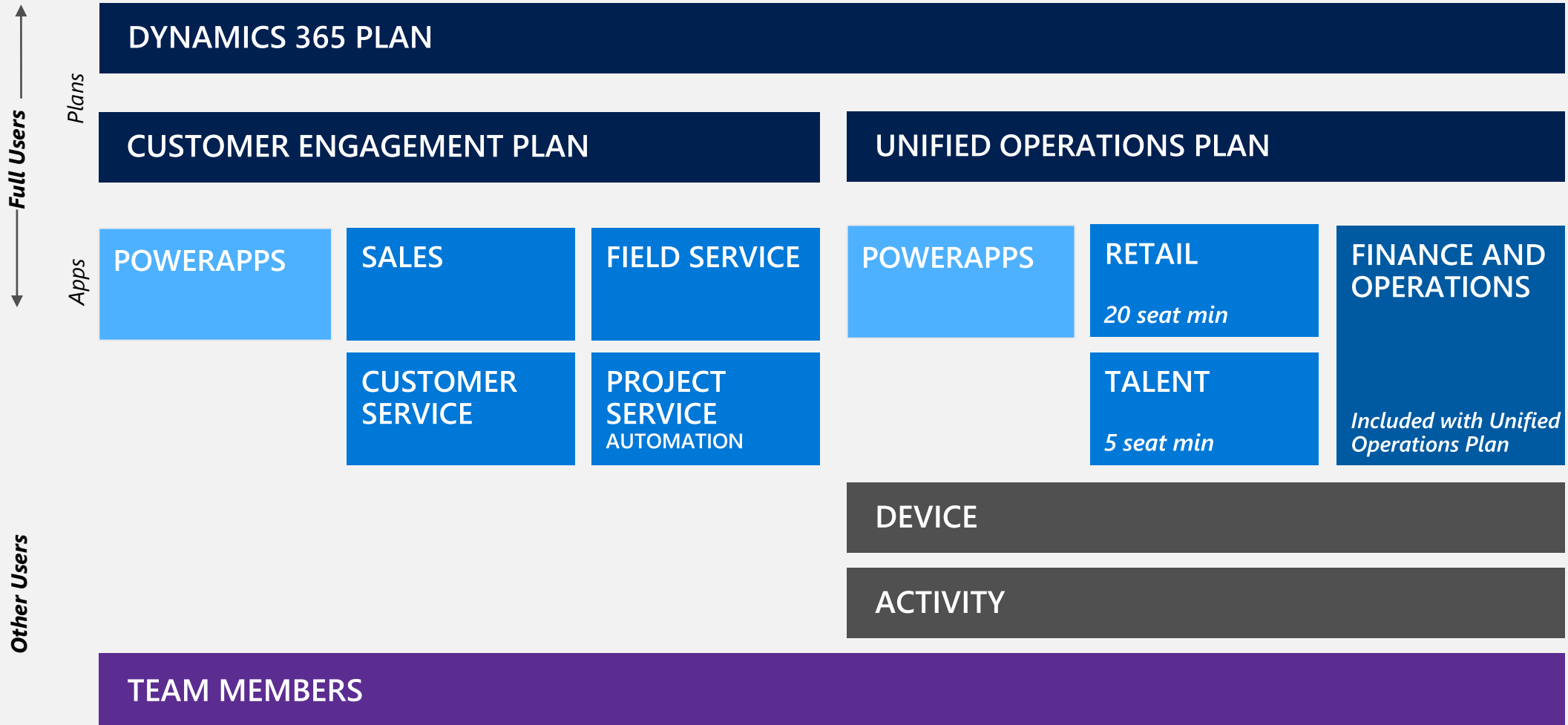




Microsoft Dynamics 365 for Field Service  
Demo Data

# Dynamics 365 Enterprise Edition

(October 2017)



# Integrations and Extensions



# Integrations with Dynamics 365 for Field Service

- Dynamics 365
- Office 365
- Power BI
- Azure IoT Suite
- Resource Schedule Optimization
- Custom Extensions
- 3<sup>rd</sup> party: Twilio & Glympse



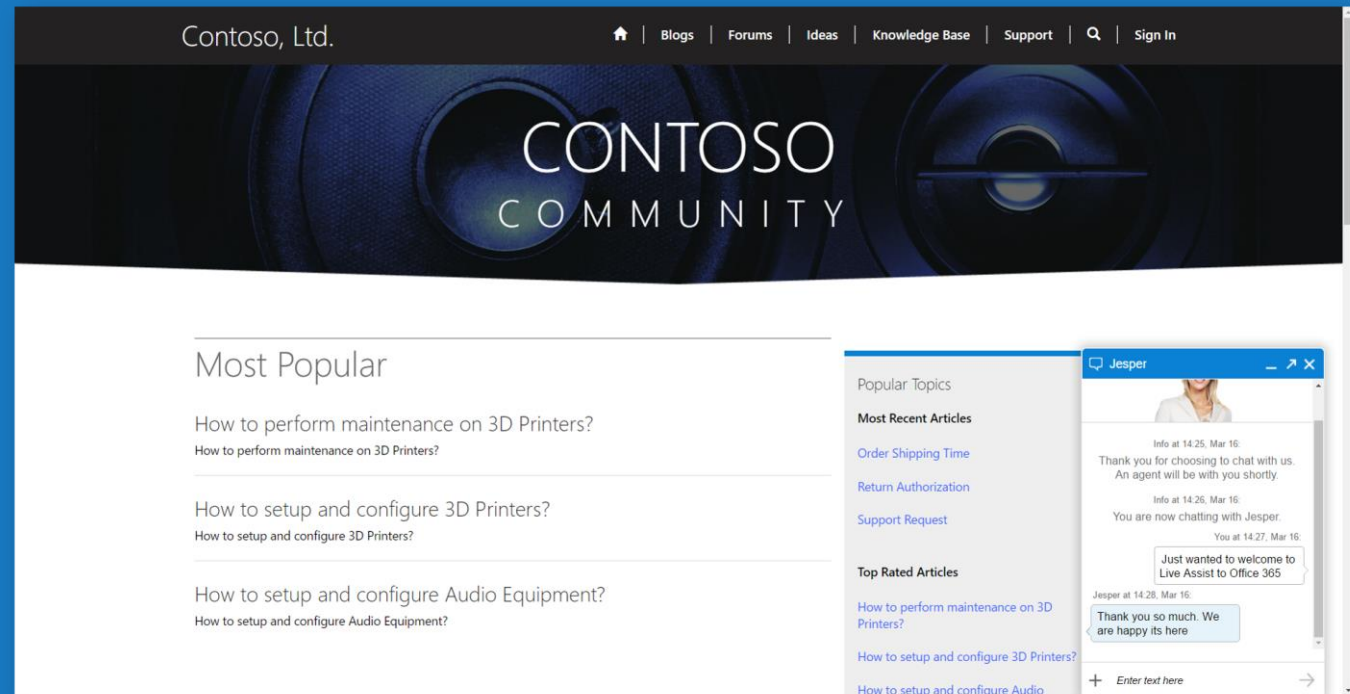
# Integration with Dynamics 365 Portals

Empower users

Build knowledge

Improve efficiency

Increase customer satisfaction



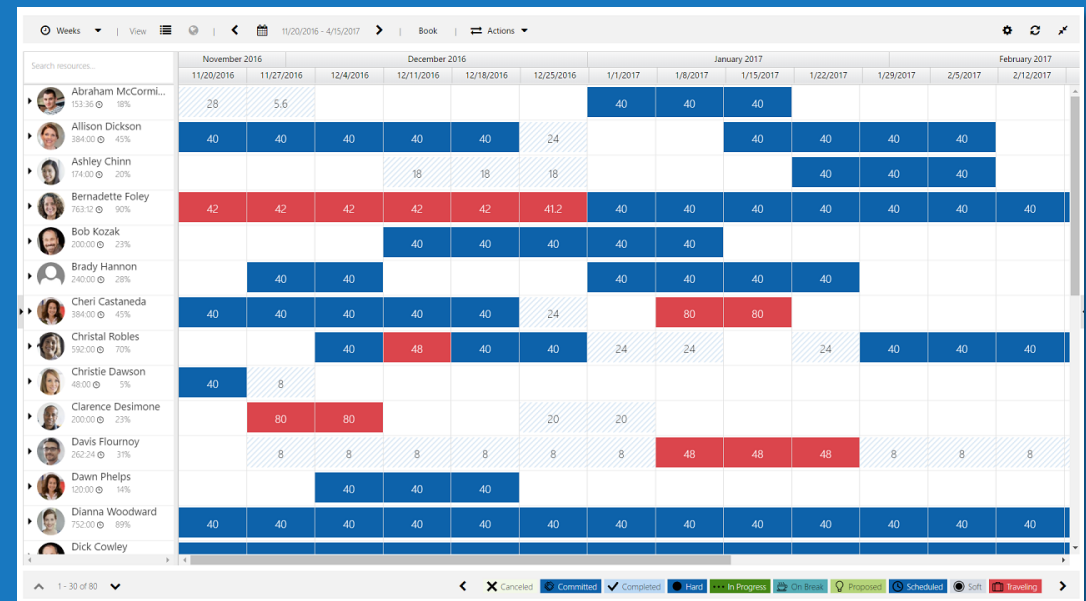
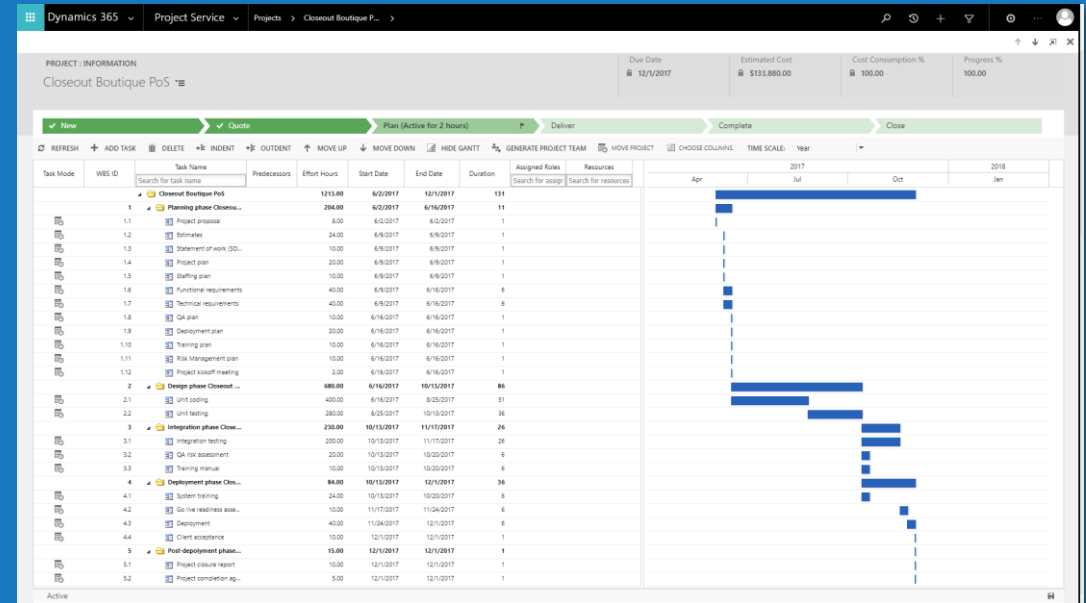
# Integration with Dynamics 365 for Project Service Automation

Shared resources across

Field & Project Service

Unification of contracts, billing and resources

One familiar user experience



# Integration with Office 365

Track incoming and outgoing Email communication

Generate quotes and share them with the customer

Manage files in document libraries

Stay in touch with your internal and external networks

Integrate telephony system



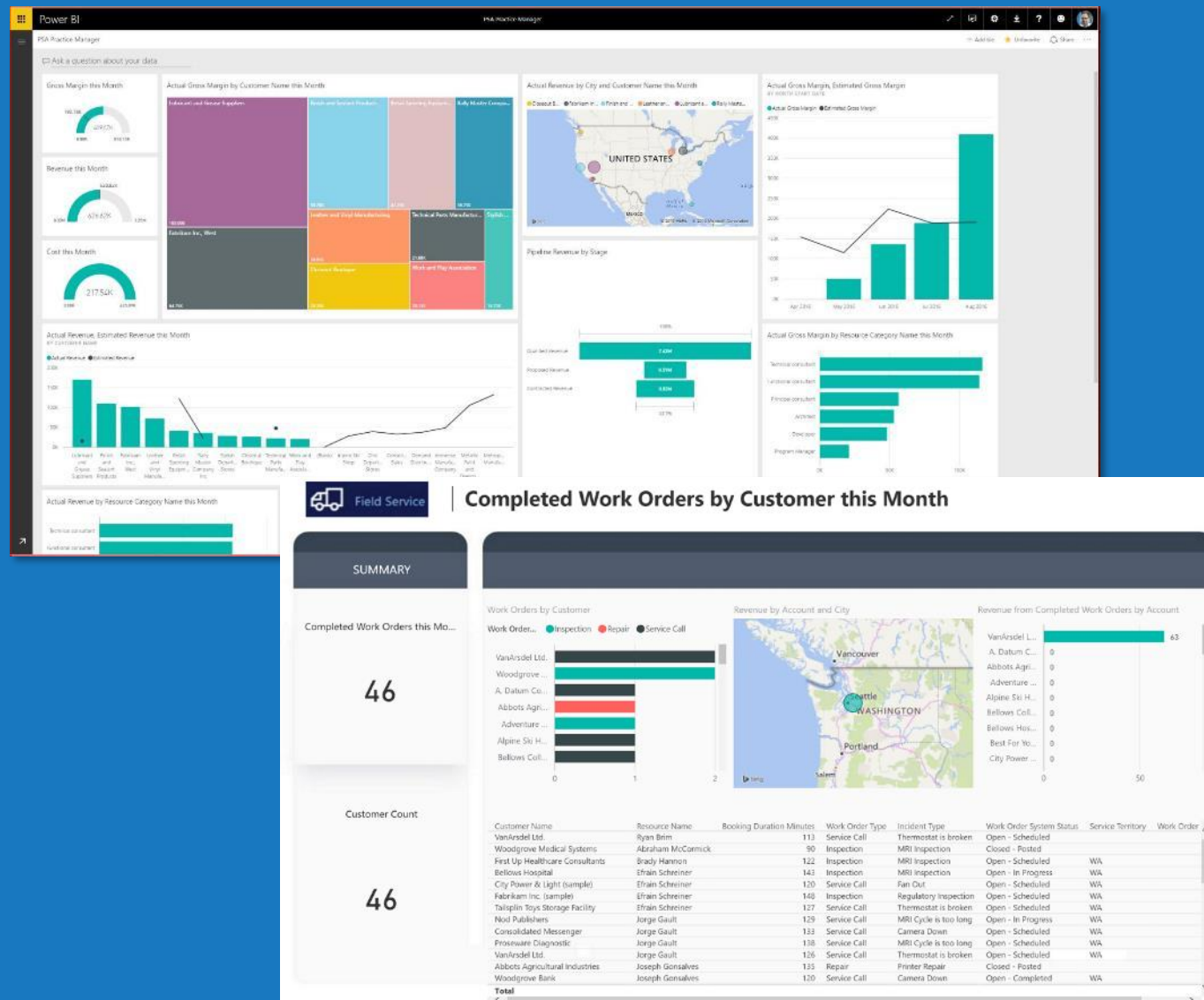
# Integration with Power BI

Real time analytics

Interactive Dashboards &  
Custom Reports

Export to Excel functionality

Business Intelligence for everyone



[Dynamics 365 Field Service Analytics](#)  
[Power BI Template](#)



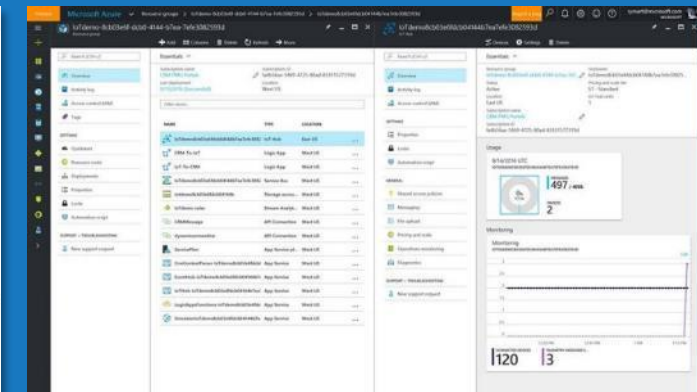
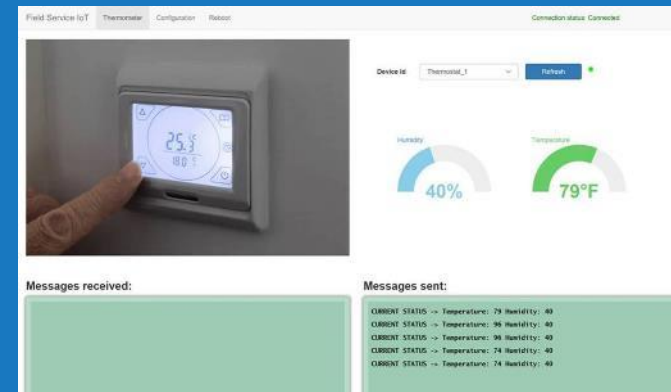
# Integration with Azure IoT Suite – Connected Field Service

Detect, troubleshoot, and resolve issues remotely with IoT

Predict when maintenance is needed

Connectivity and advanced analytics

Automate Work Order creation



[Microsoft Ignite CFS Session](#)



# Resource Schedule Optimization

## Scale automatically

### Resource Schedule Optimization Add-On

Schedule & route your selected resources:

- As scheduled
- Per trigger event
  - Ad-hoc

*A Resource is an entity which can be defined as:*

- People
- Equipment
- Crew



# Custom Extensions

Microsoft Dynamics 365 SDK

Client-side JavaScript

Plug-ins

Workflows

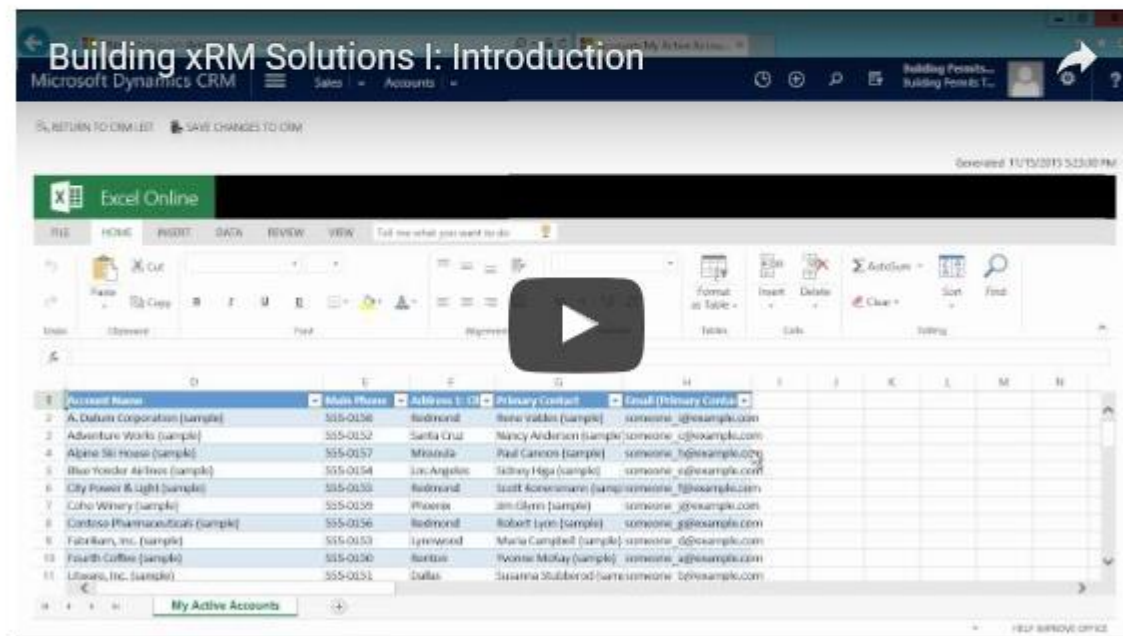
[MSDN: Support Extensions](#)



## Building xRM Solutions I: Introduction

Dynamics CRM's capabilities can be leveraged to build line of business applications, managing **any** relationship and interaction versus customer relationships and interactions. In this video, we'll walk through the the xRM framework within CRM, including:

- Rapid application development
- Business process management
- Business intelligence
- User experience





# Twilio & Glympse Apps

## Twilio

Automated outbound phone calling  
Automated SMS Notifications

## Glympse

Technicians locations tracking in real time

[Twilio](#) & [Glympse](#)



## Dynamics CRM Field Service Twilio Integration

Language: English

Download

### Twilio Integration for Dynamics CRM Field Service

+ Details

+ System Requirements

+ Install Instructions

The screenshot shows the AppSource page for the 'Glympse integration for Field Service' app by Microsoft. The page has a blue header with navigation links: AppSource, Apps, Partners, List on AppSource, and Blog. A 'How it works' button is in the top right. The main content area has a breadcrumb 'Apps > Glympse integration for Field Service'. The app card features a blue truck icon, the title 'Glympse integration for Field Service' by Microsoft, and a 'GET IT NOW' button. Below the icon, it lists 'Products: Dynamics 365 for Field Service', 'Publisher: Microsoft', and 'Version: 1.1.0.0'. To the right, there is a 'Learn more' link and a 'FieldService' tag. A description states: 'Glympse Integration for Microsoft Dynamics 365 for Field Service provides technician location tracking in real time that can be shared with the customers.' On the far right, there is a map showing a route with a location pin and a 'Contoso' logo.

# Concluding Remarks

# Why should you sell Dynamics 365 for Field Service?

## Increase Revenue

- Sell as End to End Solution
- Sell it together with other D365 Apps
- Profit from predictive services
- Deliver Excellent Customer Service

## Solution Customer Profile

- Multiple client locations
- Customer Service initiative
- Expensive labor force or Equipment

[Field Service for Microsoft Dynamics 365 Datasheet](#)



**Microsoft Dynamics 365 for Field Service**

### Master the service call

Increase customer satisfaction with intelligent scheduling, native mobile support, and remote asset monitoring to help you get the job done right the first time.

[GET STARTED >](#)

Optimize your scheduling

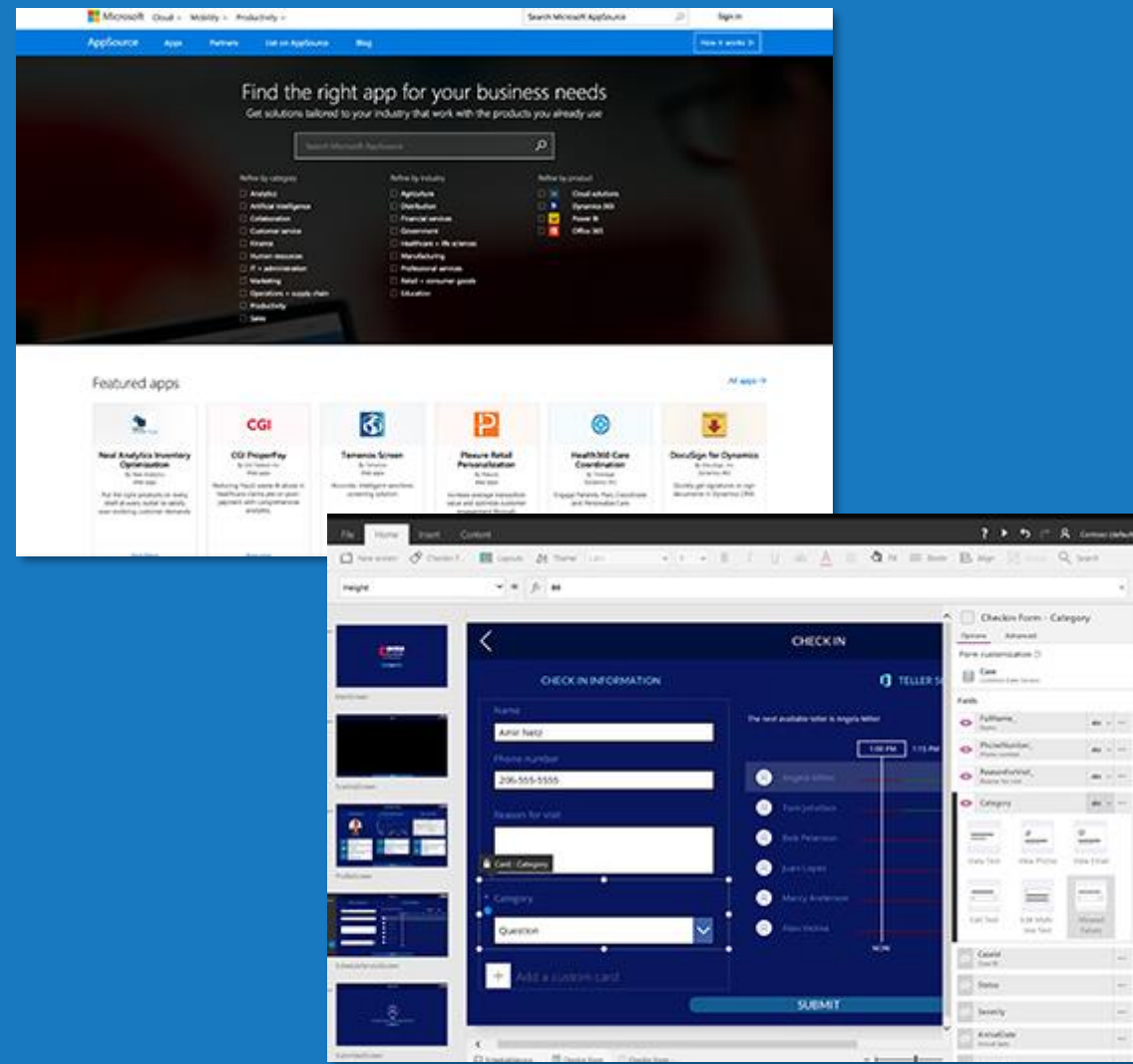
Equip your mobile workforce

Profit from predictive services

# Do more with Dynamics 365 for Field Service

Add prebuilt applications

Customize your applications



# Additional Resources

[Dynamics 365 for Field Service - User's Guide](#)

[Microsoft Field Service Click Through Demos](#)

[DLP Training - Field Service \(Technical\)](#)

[Microsoft Demos Website](#)

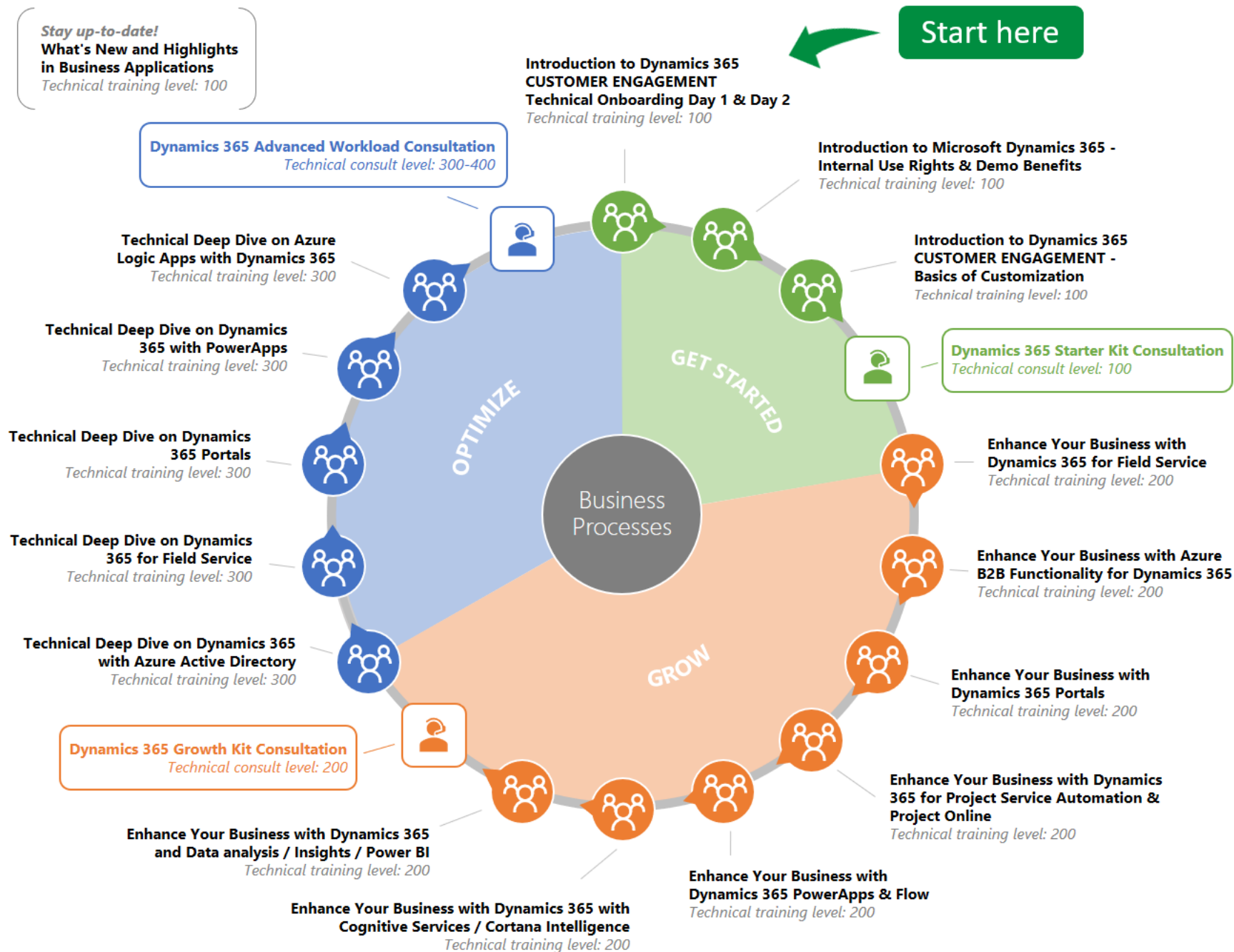
## Microsoft Dynamics 365

# Business Processes

Get started on one our of three technical journeys to expand your skillset across the business processes practice area. Through a mix of one-on-one consultations and technical training webcasts, our Dynamics 365 technical experts will help you get started, grow and optimize your business.

Get started today!  
[aka.ms/BusinessProcesses](https://aka.ms/BusinessProcesses)

MPN Technical Presales & Deployment Services



# 1:1 Packages

	1:1 UC Starter Kit	1:1 UC Growth Kit	1:1 UC Consultation (Optimize)
Phase of Lifecycle	• Get started	Grow your business	• Operate / Optimize
When to Use/Value Proposition?	<ul style="list-style-type: none"> <li>Onboard customers to Exchange &amp; SIB Online</li> <li>Chose the correct migration method</li> <li>Prepare actual environment to move it to the cloud</li> <li>Compare On-prem vs Online services features</li> </ul>	Moving email environment to ExO. Deploying a hybrid environment Federate my SIBO organization with external organizations/users	<ul style="list-style-type: none"> <li>Leverage new security solutions for ExO environment</li> <li>Leverage new Enterprise Voice Cloud features for online users</li> </ul>
Messaging	Help your customer to understand the different ways and scope to get moved to Exchange & SIB Online. In this starter kit we will enhance your knowledge on various aspects of ExO & SIBO for migration understanding, planning, remediation & initial set up	In this starter kit we will introduce your company to deploy a hybrid configuration and extend their collaboration through external companies by understanding, planning and configuring federation features.	In this advance consultation we will cover how to address the most common security scenarios that your customer may need to protect their e-mail service. We will cover too how to extend the SIBO capabilities for conference & meetings through the new Cloud Enterprise Voice features.
Technologies?	<ul style="list-style-type: none"> <li>ExO mailboxes</li> <li>SIBO: IM, Presence, Conference &amp; Meetings</li> </ul>	<ul style="list-style-type: none"> <li>EXO &amp; SIBO in Hybrid sceneries</li> <li>Skype &amp; Lync2013</li> </ul>	<ul style="list-style-type: none"> <li>EOP Anti-malware &amp; Antisoam</li> </ul>
Outcomes?	<ul style="list-style-type: none"> <li>Discovery questions</li> <li>Migration methods guidance</li> <li>Remediation guidance</li> <li>Leading best practices, planning and guidance</li> <li>Demo</li> </ul>	<ul style="list-style-type: none"> <li>Discovery questions</li> <li>Hybrid &amp; Federation</li> <li>Migration &amp; Hybrid to use</li> <li>Leading best practice</li> <li>Demo</li> </ul>	
Partner Experience	<ul style="list-style-type: none"> <li>Discovery call, 1:1 discussion</li> <li>BOM</li> <li>1:M recording (Only ExO)</li> <li>Review architecture(no sign off)</li> </ul>	<ul style="list-style-type: none"> <li>Discovery call, 1:1 discussion</li> <li>BOM</li> <li>1:M recording (Only ExO)</li> <li>Review architecture(no sign off)</li> </ul>	
BASE IP	<ul style="list-style-type: none"> <li>Current 1:Many content (Only for ExO)</li> <li>TR content</li> <li>Technet</li> </ul>	<ul style="list-style-type: none"> <li>Current 1:Many content</li> <li>TR content</li> <li>Technet</li> </ul>	

	1:1 SharePoint Online Starter Kit	1:1 SharePoint Online Growth Kit	1:1 SharePoint Online Advanced Consultation
Phase of Lifecycle	• Get started	Grow your business	• Operate / Optimize
When to Use/Value Proposition?	<ul style="list-style-type: none"> <li>Onboard customers to SharePoint Online</li> <li>Migration planning, information Architrave planning, external sharing</li> </ul>	Keep your sensitive data on-premise while leveraging SharePoint Online for collaboration and team work with your customer, partners and vendors	Leverage new solutions for user adoption and team collaboration
Messaging	Move your customer to SharePoint Online. In this starter kit we will enhance your knowledge on various aspects of SharePoint Online and OneDrive for Business including migration planning and information architecture and initial set up	In this starter kit we will introduce various way your customer can leverage and enhance their team collaboration using Microsoft Teams, Groups, Planner and use Flow / Workflow to automate their business process	In this advance consultation we will cover how to address the most complex scenarios that your customer may need to set up including Hybrid and advanced authentication using ADFS or Azure B2B and how to protect their data and make they stay complaint to any regulatory requirements
Technologies?	<ul style="list-style-type: none"> <li>File Migration</li> </ul>	<ul style="list-style-type: none"> <li>Teams</li> </ul>	<ul style="list-style-type: none"> <li>Security</li> <li>Compliance</li> <li>Hybrid</li> <li>Advanced Authentication (ADFS, Azure B2B)</li> </ul>
Outcomes?			<ul style="list-style-type: none"> <li>Discovery questions</li> <li>Sample scenarios / how to use</li> <li>Leading practices</li> <li>Demo</li> </ul>
Partner Experience			<ul style="list-style-type: none"> <li>Discovery call, 1:1 discussion</li> <li>BOM including sample Pshell scripts</li> <li>Review architecture(no sign off)</li> </ul>
BASE IP			<ul style="list-style-type: none"> <li>TD8</li> <li>Current 1:many materials</li> </ul>

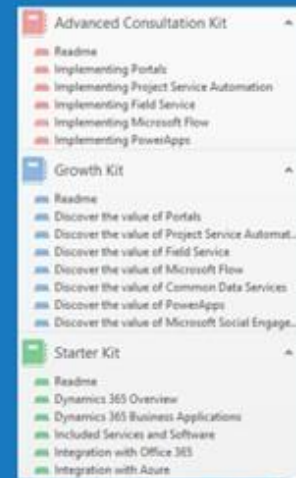
## New Packaged Services

[Dynamics 365 Starter Kit Consultation](#)

[Dynamics 365 Growth Kit Consultation](#)

[Dynamics 365 Advanced Workload Consultation](#)

5 Partner Advisory Hours per Kit + Consultation



[askmk@microsoft.com](mailto:askmk@microsoft.com)

[Dynamics 365 Starter Kit Consultation](#)

[Dynamics 365 Growth Kit Consultation](#)

[Dynamics 365 Advanced Workload Consultation](#)

# MPN technical benefits used to access Technical Presales & Deployment Services

A core part of the technical journeys is to offer personalized technical consultations as guided next steps to deep dive into presales and deployment scenarios to complete your customer projects, which require use of MPN technical benefits.

## Technical Presales Assistance

Gain a competitive advantage to win more deals by connecting with Microsoft experts for personalized remote technical assistance during the presales phase to help you position Microsoft solutions, overcome customer objections, demonstrate the value of solutions, and present solutions to your prospective customers.

## Partner Advisory Hours

Partner advisory hours are the currency used to access personalized technical assistance during the design, development and deployment phases to successfully implement Cloud and hybrid solutions for your customers.



1. [Learn how to qualify for MPN benefits](#)
2. [View available partner advisory hours](#) (advisory request)\*
3. [Review supported products and scenarios](#)
4. [Get started on your technical journey and request a consultation](#)

\*Requires access to the Microsoft Partner Network portal. To associate to your organization's MPN account, follow the steps at <http://aka.ms/SimplifiedAssociation>.



# How to submit a request for a Technical Presales & Deployment consultation request

Get personalized assistance with technical presales & deployment scenarios via an Advisory request



Requires you to sign in to the Microsoft Partner Network portal.

To associate to your organization's MPN account, follow the steps at <http://aka.ms/SimplifiedAssociation>.

<http://aka.ms/ContactPTS>



Watch the demo video

## How to submit

1. Visit <http://aka.ms/ContactPTS>  
(MPN > Support > My Support > Submit Advisory Service request)
2. Click **My Support** then **Submit Advisory Service request**.
3. In the request form:
  - complete the requested information
  - for the **description of the problem**, provide as much detail as possible (up to 3000 characters)
4. Prior to submitting the case, review the related resources (when available) to help you solve your issue from the top right side of the page.

## What's next

You will receive a confirmation email with your case information and the expected timeframe for follow-up, along with links to related resources (when available.)

## Example

### Provide request details

Provide a title for your request: \*

Using Azure Backup with IaaS

28 of 255 characters

Technology: \*

Azure Storage and Backup Services

Storage Blobs and Files, Backup, Import/Export, Site Recovery, StorSimple

Scenario: \*

Deployment/Configuration

Get assistance on Set up and Configuration of Initial Installation of Product (New Install), Pre-deployment activities

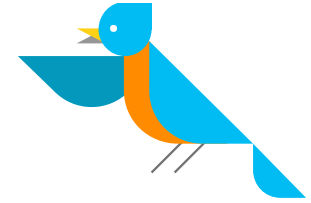
Deployment Type: \*

Cloud/Hybrid/To Be Determined

Problem Description \*

We have a client in Azure virtual machines and we would like to use Azure Backup to protect those VM's. We know that it is possible but have not worked with the feature yet. Is there anyone who could help us with how to deploy Backup for Azure infrastructure?

# Please help us to improve our sessions




Thank you for attending our event today.

We would greatly appreciate it if you would take a few minutes to complete our survey and provide feedback on your experience.

The link will be made available in your conversation window momentarily.

Thank you in advance for helping us improve our services.

Microsoft



Thank you for attending the event! We invite you to complete a brief survey to provide feedback on your event experience. As a note, this survey is not anonymous.

Did you achieve your objectives for attending this event? \*

☒ Yes  
☐ No

How satisfied are you with this Microsoft Support experience? \*

☒ 9 - Very Satisfied  
☐ 8  
☐ 7  
☐ 6  
☐ 5  
☐ 4  
☐ 3  
☐ 2  
☐ 1 - Very Dissatisfied

Tell us more about this experience \*

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