

# FAQ about draft email responses using Copilot in Field Service for Outlook

Article • 08/08/2024

This article answers common questions about the AI technology used to draft email responses in Dynamics 365 Field Service for Outlook. It also includes key considerations and details about how the AI is used, how it was tested and evaluated, and lists specific limitations.

## What is draft email responses using Copilot in Outlook?

This feature allows frontline managers to easily respond to customer emails with proposed schedules or schedule confirmations on their work orders.

## What are the feature's capabilities?

The feature parses the contents of an email thread and Dynamics 365 Field Service work orders and uses that information to draft an email response to the customer. The feature generates a proposed schedule for unscheduled work orders or schedule confirmation for scheduled work orders.

## What is the feature's intended use?

The intention is to aid frontline managers in responding to emails about work order schedules in less time and with less manual effort.

## How was the feature evaluated? What metrics are used to measure performance?

This feature was evaluated using both conventional performance testing and methods targeted to AI features to ensure user safety and security. An extensive set of test cases was used to evaluate the risk of generating potentially sensitive or harmful content. Standardized internal tooling provided further testing to ensure harm filters and security mitigations functioned as intended, including prevention of attacks such as jailbreak attempts. More evaluation takes place with each subsequent update throughout the feature's lifecycle. [Learn more about Microsoft Responsible AI principles](#).

# What are the limitations of the feature? How can users minimize the impact of the Outlook email response limitations when using the feature?

Email responses are generated for work orders with a **System Status** of **Scheduled** or **Unscheduled** only.

## What are the supported geographies and languages?

For more information, go to [Copilot International Availability report](#).

## What operational factors and settings allow for effective and responsible use of the feature?

Users are reminded that AI-generated content can be inaccurate, both above the form and in the description box. Users are encouraged to review the AI-generated content before saving.

## See also

- [Draft an email response with Copilot](#)
- [FAQs for Dynamics 365 Field Service](#)

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# FAQ about work order summary with Copilot and summary configuration (preview)

Article • 12/06/2024

The work order summary is an AI-powered tool that gives you a quick and smart summary of your work orders and their related data. Summary configuration allows administrators to specify which data fields go into the summary. In this article, you get answers to common questions about how these features work and what their limitations are.

## What is the work order summary feature?

The [work order summary feature](#) in Dynamics 365 Field Service uses AI to give service managers, dispatchers, and frontline workers a concise and relevant summary of a work order and its related data. The summary is a snapshot of the work order's status, history, progress, and next steps. It also includes important information such as arrival times, work criticality, and parts usage.

To customize the summary, an administrator can use the summary configuration feature to choose the data fields that Copilot uses to summarize a record in Field Service.

## What are the feature's capabilities?

The work order summary uses your security role to access the data that you can see and summarizes it based on the work order's status. The summary might include:

- A summary of the work order's problem, resolution, and customer feedback
- Booking details such as start and end time, travel time, and resource
- Activities such as phone calls, emails, and appointments
- Notes from the technician or other users
- Products, services, and service tasks that are required or completed for the work order
- Additional information such as requirement characteristics, asset details, and invoice information, depending on the work order's status

The feature doesn't save the summary, and it doesn't expose any sensitive data that you don't have permission to see.

To customize the summary, an administrator can turn on the summary configuration feature to choose the desired fields to be summarized by choosing the table and column from drop downs. Once the selection is made, the administrator can test the configuration by generating a preview summary using actual data from a record.

## What is the feature's intended use?

You can use work order summary to quickly understand the state of a work order at any stage of its lifecycle. The feature provides a context-specific summary that helps you decide what actions to take or what details to investigate further. It's not a substitute for a thorough review of the work order and its related information.

An administrator can tailor the summary that Copilot creates to only include specific fields that the scenario calls for, thereby providing a summary more relevant to a frontline worker's needs.

## How was the feature tested and what metrics are used to measure its performance?

We tested the feature in English. For detailed information on the supported languages, [Explore Copilot features by geography and languages](#).

We checked the accuracy and performance of the summary based on the data from the work order. The summary quality depends on the quality of the data in the system. If the data is incomplete or incorrect, the summary might reflect that.

We didn't find any cases where the summary made up information that wasn't in the data. However, we did find some cases where the summary didn't summarize the data correctly.

## What are the limitations of the feature and how can I minimize their impact?

The work order summary and summary configuration features are still in preview, and we're working on improving them. You can help us by giving us feedback using the like/dislike buttons on the summary. We use this data to evaluate and improve the quality of the content.

The feature only works online. You can't use it when you're offline.

The feature was tested in English. If you use it in other languages, you might get inaccurate summaries.

The feature summarizes the data that you can see and that exists in the system. If you don't have the right permissions or if the data is poor, the summary might not be useful. The quality of the summary matches the quality of the inputs.

The default work order summary is generated with predefined optimizations. These optimizations are not applied when the summary configuration feature is enabled.

## What operational factors and settings allow for effective and responsible use of the feature?

Administrators can enable or disable the feature for your environment by going to Field Service settings and toggling the **Copilot recap** option.

To customize the summary, an administrator can enable **configure summary** to choose the fields that Copilot uses to generate the summary. No other aspects of the prompt can be customized. However, the feature respects your personalization settings for date/time format and time zone, as well as your environment-specific table and field labels. Administrators should test the chosen configuration with data from a record before saving the change.

[Learn more about the data collection policy of this feature.](#)

## Can I add the summary to other forms or records?

The form component is called **Copilot recap**. By default, it's initially available only on the new work order experience form. An administrator can [add the control to other work order forms](#).

Since the content that the control generates isn't saved in the system and uses the system status of the work order to generate a more contextually relevant summary, it's bound to the **System Status** column.

At this time, the control is built for the work order. It can't be used to summarize other records.

## See also

- [Work order summary with Copilot in Field Service](#)
  - [Responsible AI FAQ for Dynamics 365 Field Service](#)
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# FAQs for work order update (preview)

Article • 11/12/2024

These FAQs describe the AI impact of the Dynamics 365 Field Service work order update (preview) feature.

## What is work order update with Copilot?

Work order update allows frontline workers to describe work performed in natural language on their mobile device. This description of work is used by Copilot to recommend updates to fields in the new Field Service Mobile user experience. This feature reduces the effort of manually going through forms and fields to update them and saves the frontline worker time within the app experience.

## What are the feature's capabilities?

Based on user input, the feature recommends fields to update in the mobile application. The frontline worker gets suggestions for all recommended updates, which they review and confirm before updates are made to the record.

## What is the feature's intended use?

A typical workflow for the frontline worker involves updating data fields within forms to track the progress of a booking. They record start and end times of the work and log the work tasks performed. This feature assists the frontline worker with those updates on a mobile device with internet connection.

## What are the limitations of work order update with Copilot? How can users minimize the impact of the limitations when using the system?

- This feature is currently in preview. Share your feedback on the quality of the content using the like and dislike icons in the feature's control. We use this data to evaluate and improve the quality of the capability.
- It's available only in the new field service mobile user experience.
- Copilot can only update the fields of a predefined schema.

- This feature requires an active internet connection. It's not available while users are offline.
- We evaluated the feature in English only. You can get inaccurate responses with other languages. [Explore Copilot features by geography and languages ↗](#).

## What operational factors and settings allow for effective and responsible use of the feature?

While this feature is in preview and only available for environments within the North America and United Kingdom regions, administrators can enable or disable it for a given environment. This feature is only available, out of the box, on the work order form.

## Can I add update fields and forms outside of the new Field Service mobile user experience?

Work order update is limited to fields within the new mobile user interface. Work order update can modify the following fields. The feature doesn't update any fields outside of this experience and doesn't recommend updates for any fields outside of this experience.

- Booking status
- Booking times
- Work order service task completion
- Work order product quantity
- Work order product line status
- Work order service duration
- Work order service line status

Work order update is only available within the booking experience. You can't modify how to access the feature but admins can disable it for their users.

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# FAQ about Dynamics 365 Field Service Plugin for Microsoft Copilot

Article • 12/03/2024

## Important

The Dynamics 365 Field Service Plugin for Microsoft Copilot is no longer available after January 15 for users of the Field Service app in Microsoft Teams. For more information, see [Feature deprecations](#).

This FAQ answers questions about the AI impact of the Dynamics 365 Field Service Plugin for Microsoft Copilot and how the plugin helps with work orders.

## What is Dynamics 365 Field Service Plugin for Microsoft Copilot?

Dynamics 365 Field Service Plugin for Microsoft Copilot uses the power of Microsoft 365 Copilot as your AI assistant. A [Copilot for Microsoft 365 license](#) is required. The plugin enables authorized users to engage in a natural-language conversation about work orders with Field Service in Microsoft Teams.

## What are the feature's capabilities?

The feature allows you to ask questions about work orders and generate answers quickly. For example, frontline managers can ask for a list of all work orders for tomorrow or how many high-priority work orders from last week that didn't complete.

Frontline workers can ask how many work orders they have for next week or ask for detailed information on a specific work order. They can ask how to do a task or what tools they need for the job.

## What is the feature's intended use?

The feature is intended to help frontline managers and workers who use Field Service in Teams. It provides information at their fingertips without having to access the Field Service web application and search for it.

# How was the feature evaluated? What metrics are used to measure performance?

The feature is evaluated for accuracy of understanding user prompts, the generated results, and the performance of generating results.

In addition, it's evaluated with embedded monitoring for Responsible AI. Specifically, this feature has been tested with an array of scenarios to ensure it captures and mitigates issues like inappropriate language usage, malicious intention of jail break, and data fabrication.

# What are the limitations of the feature? How can users minimize the impact of the limitations when using the system?

- Only questions related to Field Service work orders are supported. Questions about information contained in tables, images, or figures within a document or PDF work order attachment aren't supported.
- You can't create, schedule, or close work orders.
- Educational and government environments or other highly regulated organizations aren't supported.

# What types of data are supported?

The feature supports:

- Structured data from the Field Service work order tables in Dataverse, typically managed in tables and columns.
- Unstructured data in the form of text within documents and PDFs attached to the Field Service work order. Support of unstructured data is in public preview.

# What are the supported geographies and languages?

[Explore Copilot features by geography and languages ↗](#)

# What operational factors and settings allow for effective and responsible use of the feature?

Admins can choose to [block the Microsoft Copilot plugin](#) from certain users or not deploy it.

Feedback you provide on your satisfaction with generated articles is used to improve system quality. To provide feedback on responses generated through Copilot, select the thumbs-up or thumbs-down icon.

## See also

- [Dynamics 365 Field Service Plugin for Microsoft Copilot](#)
- [Responsible AI FAQ for Dynamics 365 Field Service](#)

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Find tools, scripts, and guidance to help you implement solutions with Dynamics 365 Field Service.

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## Samples and tools



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[Overview](#)



### SAMPLE

[Add crew information to resource cells](#)

[Customize the template for bookings](#)

[Schedule board settings management control](#)

## Setup



### OVERVIEW

[Field mapping for the schedule board settings](#)

[Set up Azure Pipelines to deploy Field Service](#)

## Copilot and generative AI



### DEPLOY

[Use Copilot to create sample data](#)

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#### [HOW-TO GUIDE](#)

[Transport summary configurations across environments](#)

## Analytics

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#### [OVERVIEW](#)

[Field Service mobile app offline usage](#)

## Tools for testing

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#### [OVERVIEW](#)

[Load test the solution](#)

[Set up test automation with Playwright](#)

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## Tools for development

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#### [OVERVIEW](#)

[Validate the solution](#)

# Submit a support request

Article • 05/22/2024

Create a support request to get help from a Microsoft representative if you encounter an issue with Dynamics 365 Field Service or Resource Scheduling.

Try the following *before* submitting a support request to resolve the issue.

- Search the [Field Service documentation](#).
- Check out the [community forum](#).
- [Run Solution Health Hub](#) to run diagnostic tests on your environment (system administrators only).

Administrators can follow the instructions below to create a support request.

1. Go to the Power Platform admin center located at <https://admin.powerplatform.microsoft.com/support>.
2. Go to the **Help + support** section in the left navigation pane.
3. Select **New support request** in the top left.
4. Select **Dynamics 365 Field Service** and choose the environment that your issue applies to. Tell us what you need help with and proceed through the support experience.

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