

```
{  
  "CalendarEventInfo": "{\"CalendarId\":\"a68245c9-ba2e-4496-9c18-  
3bee75fda396\",\"InnerCalendarDescription\":\"Family  
Vacation\",\"EntityLogicalName\":\"bookableresource\",\"TimeZoneCode\":5,\"R  
ulesAndRecurrences\":[{\"Rules\":[{\"StartTime\":\"2021-06-  
15T00:00:00.000Z\",\"EndTime\":\"2021-06-  
17T00:00:00.000Z\",\"Effort\":1,\"WorkHourType\":3}]]}}"  
}
```

## Response

```
{  
  "InnerCalendarIds": "[\"266c434e-d5be-eb11-a81d-000d3a6e4359\"]"  
}
```

## Create all-day working hours

Tim has a 72-hour shift starting May 20, 2021. Debbie uses the `msdyn_SaveCalendar` API to create Tim's work hours.

### Request

```
{  
  "CalendarEventInfo": "{\"CalendarId\":\"a68245c9-ba2e-4496-9c18-  
3bee75fda396\",\"EntityLogicalName\":\"bookableresource\",\"TimeZoneCode\":5  
,\"RulesAndRecurrences\":[{\"Rules\":[{\"StartTime\":\"2021-05-  
20T00:00:00.000Z\",\"EndTime\":\"2021-05-  
22T00:00:00.000Z\",\"Effort\":1,\"WorkHourType\":0}]]}}"  
}
```

### Response

```
{  
  "InnerCalendarIds": "[\"6e160a8e-d5be-eb11-a81d-000d3a6e4359\"]"  
}
```

## FAQs

## I'm getting the error, "StartTime can't be greater or equal to EndTime."

Make sure there are no overlaps in the time slots of the different calendar rules. Check the dates to make sure **StartTime** isn't later than **EndTime**. Also, verify that the times follow the 24-hour format.

## Can the APIs be used to update the "Work Hour Templates" entity?

Yes, you can use this API to create and update work hour templates in addition to resource work hours.

I'm getting the error, "There was an error deserializing the object of type Microsoft.Dynamics.UCICalendar.Plugins.SaveCalendarContract+CalendarEventInfo. The input source is not correctly formatted.  
or  
Expecting state 'Element'.. Encountered 'Text' with name "", namespace ""."

Make sure that the string is parsed correctly. There might be missing brackets, commas, or semicolons.

## I'm getting the error, "Invalid recurrence pattern. Refer to the documentation for supported patterns."

We currently only support this pattern:

`FREQ=DAILY;INTERVAL=1;BYDAY=SU,MO,TU,WE,TH,FR,SA.` `BYDAY` can be changed to include fewer days; however, `FREQ` and `INTERVAL` can't be changed. Make sure there are no spaces in the pattern.

## How do we get information of the CalendarId and the InnerCalendarId of the resource?

The `CalendarId` can be retrieved from resource attributes. Make this call to get this information: `[org-url]/api/data/v9.1/bookableresources([bookableresourceGUID])`.

An example of the previous call would be `[org-url]/api/data/v9.1/bookableresources(7bb0224b-6712-ec11-94f9-000d3a6d888e)`.

The `InnerCalendarId` can be retrieved from calendar attributes. Make this call to get this information: `[org-url]/api/data/v9.1/calendars([calendar-id-from-above-call])?$expand=calendar_calendar_rules`.

An example of the previous call is `[org-url]/api/data/v9.1/calendars(02481736-1b6a-4d49-9ebd-a5bd041c1c99)?$expand=calendar_calendar_rules`.

## What happens if there are overlapping rules?

There are a couple different ranks that rules fall under:

- *Rank 1* - daily occurrence (working/non-working), and time off occurrence.
- *Rank 0* - weekly recurrence (working/non-working).

## V2 overlapping rules

- The Rank 1 rules have a higher priority than Rank 0 rules. if there are two rules (one of each rank) on the same day, the daily occurrence or time-off occurrence take the priority over the weekly recurrence.
- When there are multiple Rank 0 rules within the same date span:
  - If the times don't intersect, they'll both remain on the calendar.
  - If the times intersect, the rule that was most recently created/modified is the one that is considered for the resource's calendar. All other intersecting rules in the date span are removed. If some rank 0 rules have intersections on some dates but not on others, the rule gets spliced to retain the non-intersecting sections, while the intersecting portions are removed.

Examples of V2 calendar behavior:

### Example 1 - Repeating work hours: Overlapping dates with no overlapping days/times

For a given date span, a technician works morning, afternoon, or night shifts across different days.

1. Create a first repeating calendar rule for a given date range. For example: *Repeat Mon, Tue; 1.1-4.1; 8am-5pm ET*.
2. Create a second repeating calendar rule for an intersecting date range, while ensuring that the work hours don't intersect with the previous days or times. For example: *Repeat Wed, Thu; 1.1-4.1; 8am-5pm ET* or *Repeat Mon, Tue; 1.1-4.1; 5pm-8pm ET*.

Result: Both calendar rules remain and coexist alongside each other.

## **Example 2 - Repeating Work Hours: Some overlapping dates, with all overlapping days and second rule starts/ends before or after the first rule**

A technician gets a new work schedule, which replaces some weeks of their old schedule. By contract they always works the same days every week.

1. Create a first repeating calendar rule for a given date range. For example: *Repeat Mon, Tue; 2.1-4.1; 8am-5pm ET.*
2. Create a second repeating calendar rule for an overlapping date range, where all days have overlapping work hours. Choose start/end dates for this new rule that are before or after the start/end date for the first rule. For example: *Repeat Mon, Tue; 3.1-5.1; 1pm-8pm ET.*

Result: The first rule gets truncated to accommodate the start/end date of the second rule. For example: *Repeat Mon, Tue; 2.1-2.28; 8am-5pm ET AND Repeat Mon, Tue; 3.1-5.1; 1pm-8pm ET.*

## **Example 3 - Repeating Work Hours: All overlapping dates, with some overlapping days/times**

The technician is a contract worker for a fixed 2-month period. They have agreed to take on additional work on some days. They want to shift the Tuesday work hours to an earlier/later time.

1. Create some repeating calendar rules for a given date range. For example: *Repeat Mon, Tue; 2.1-4.1; 8am-12pm ET AND Repeat Tue, Wed; 2.1-4.1, 1pm-5pm ET.*
2. Create a new repeating calendar rule for the same date range. Choose days/times that partially overlap with the original rules. For example: *Repeat Tue, Thurs; 2.1-4.1; 10am-2pm ET.*

Result: The new rule overwrites the old where there are overlaps, and leaves the others unchanged. For example: *Repeat Mon; 2.1-4.1; 8am-12pm ET AND Repeat Wed; 2.1-4.1; 1pm-5pm ET AND Repeat Tue, Thurs; 2.1-4.1; 10am-2pm ET.*

## **Example 4 - Repeating Work Hours: New rule dates contained within old rule, some overlapping days/times**

A technician works 8am-5pm, Mon-Fri every week. Just for two weeks, they'll be handling a special emergency project every Mon-Wed with different work hours 6am-6pm.

1. Create a first repeating calendar rule for a given date range. For example: *Repeat Mon,Tue,Wed,Thu,Fri; 1.1-No End Date; 8am-5pm ET.*
2. Create a second repeating calendar rule contained within the above date range, choose work hours that overlap on some days. For example: *Repeat Mon,Tue,Wed; 5.1-5.14; 6am-6pm ET.*

Result: The calendar should have four repeating rules by the end of this exercise:

- truncate the first rule to the start date of the second rule
- the second calendar rule
- create a new rule similar to the first rule but with the dates of the second rule for the non-overlapping days
- truncate the first rule to start from the end date of the second rule, with no end date

For example: *Repeat Mon,Tue,Wed,Thu,Fri; 1.1-4.30; 8am-5pm ET AND Repeat Mon,Tue,Wed; 5.1-5.14; 6am-6pm ET AND Repeat Thu,Fri; 5.1-5.14; 8am-5pm ET AND Repeat Mon,Tue,Wed,Thu,Fri; 5.15-No End Date; 8am-5pm ET*

### **Example 5 - Non-repeating work hours (occurrence, rank 1 rule)**

A technician has a number of team cohesion days, which take precedence over all other work hour instances for the day.

1. Create a repeating calendar rule for a given date range. For example: *Repeat Mon,Tue,Wed,Thu,Fri; 1.1-No End Date; 8am-5pm ET.*
2. Create a non-repeating calendar rule contained within the above date range. Choose work hours that overlap on some days. For example: *Non-repeat; 6.21; 7am-1pm ET.*

Result: The calendar should have 1 non-repeating rule (occurrence) by the end of the exercise. The non-repeating rule overrides the overlapping repeat event for the entire day. For example: *Repeat Mon,Tue,Wed,Thu,Fri; 1.1-No End Date except 6.21; non-repeat; 6.21; 7am-1pm ET.*

## **V1 overlapping rules**

- The Rank 1 rules have a higher priority than Rank 0 rules. So if there were two rules (one of each rank) on the same day, the daily occurrence or time-off occurrence take the priority over the weekly recurrence.
- If there are two rules of the same rank, the rule that was most recently created/modified will be the one that is considered for the resource's calendar.
- Keep in mind that all-day occurrences are of Rank 1, so you may want to consider changing it to a weekly recurrence in order to be able to add occurrence work hours and have them be respected.
- When a working hour exists and a time off occurrence is created overlapping it, the rules split in a way that ensures the time off is respected, and any remaining time as working hours will stay as is. For example, if there are working hours from 8 AM to 5 PM on September 21, and a time-off occurrence is added from 3 PM to 7 PM on September 21, this would be resolved as working hours as 8 PM to 3 PM and time off from 3 PM to 7 PM. However, if the rules were created in the opposite order (time off created first and then working hours were created) regardless of the timeslots, only the working hour would be reselected. The time off would be overridden.

## Time zone codes

[ ] [Expand table](#)

Enum	Time zone
0	(GMT-12:00) International Date Line West
1	(GMT+13:00) Samoa
2	(GMT-10:00) Hawaii
3	(GMT-09:00) Alaska
4	(GMT-08:00) Pacific Time (US & Canada)
5	(GMT-08:00) Baja California
6	(GMT-11:00) Coordinated Universal Time-11
7	(GMT-10:00) Aleutian Islands
8	(GMT-09:30) Marquesas Islands
9	(GMT-09:00) Coordinated Universal Time-09
10	(GMT-07:00) Mountain Time (US & Canada)

Enum	Time zone
11	(GMT-08:00) Coordinated Universal Time-08
12	(GMT-07:00) Chihuahua, La Paz, Mazatlan
15	(GMT-07:00) Arizona
20	(GMT-06:00) Central Time (US & Canada)
25	(GMT-06:00) Saskatchewan
29	(GMT-06:00) Guadalajara, Mexico City, Monterrey
33	(GMT-06:00) Central America
34	(GMT-06:00) Easter Island
35	(GMT-05:00) Eastern Time (US & Canada)
40	(GMT-05:00) Indiana (East)
43	(GMT-05:00) Haiti
44	(GMT-05:00) Havana
45	(GMT-05:00) Bogota, Lima, Quito, Rio Branco
47	(GMT-04:00) Caracas
50	(GMT-04:00) Atlantic Time (Canada)
51	(GMT-05:00) Turks and Caicos
55	(GMT-04:00) Georgetown, La Paz, San Juan
56	(GMT-04:00) Santiago
58	(GMT-04:00) Cuiaba
59	(GMT-04:00) Asuncion
60	(GMT-03:30) Newfoundland
65	(GMT-03:00) Brasilia
69	(GMT-03:00) Buenos Aires
70	(GMT-03:00) Cayenne, Fortaleza
71	(GMT-03:00) Salvador
72	(GMT-03:00) Saint Pierre and Miquelon

Enum	Time zone
73	(GMT-03:00) Greenland
74	(GMT-03:00) Montevideo
75	(GMT-02:00) Mid-Atlantic
76	(GMT-02:00) Coordinated Universal Time-02
77	(GMT-03:00) Araguaina
80	(GMT-01:00) Azores
83	(GMT-01:00) Cabo Verde Is.
84	(GMT+01:00) Casablanca
85	(GMT+00:00) Dublin, Edinburgh, Lisbon, London
90	(GMT+00:00) Monrovia, Reykjavik
92	(GMT) Coordinated Universal Time
95	(GMT+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague
100	(GMT+01:00) Sarajevo, Skopje, Warsaw, Zagreb
105	(GMT+01:00) Brussels, Copenhagen, Madrid, Paris
110	(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna
113	(GMT+01:00) West Central Africa
115	(GMT+02:00) Chisinau
120	(GMT+02:00) Cairo
125	(GMT+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius
129	(GMT+02:00) Amman
130	(GMT+02:00) Athens, Bucharest
131	(GMT+02:00) Beirut
133	(GMT+02:00) Damascus
134	(GMT+03:00) Istanbul
135	(GMT+02:00) Jerusalem
140	(GMT+02:00) Harare, Pretoria

Enum	Time zone
141	(GMT+02:00) Windhoek
142	(GMT+02:00) Gaza, Hebron
145	(GMT+03:00) Moscow, St. Petersburg
150	(GMT+03:00) Kuwait, Riyadh
151	(GMT+03:00) Minsk
155	(GMT+03:00) Nairobi
158	(GMT+03:00) Baghdad
159	(GMT+02:00) Kaliningrad
160	(GMT+03:30) Tehran
165	(GMT+04:00) Abu Dhabi, Muscat
169	(GMT+04:00) Baku
170	(GMT+04:00) Yerevan
172	(GMT+04:00) Port Louis
173	(GMT+04:00) Tbilisi
174	(GMT+04:00) Izhevsk, Samara
175	(GMT+04:30) Kabul
176	(GMT+04:00) Astrakhan, Ulyanovsk
180	(GMT+05:00) Ekaterinburg
184	(GMT+05:00) Islamabad, Karachi
185	(GMT+05:00) Toshkent
190	(GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi
193	(GMT+05:45) Kathmandu
195	(GMT+06:00) Astana
196	(GMT+06:00) Dhaka
197	(GMT+06:00) Omsk
200	(GMT+05:30) Sri Jayawardenepura

<b>Enum</b>	<b>Time zone</b>
201	(GMT+07:00) Novosibirsk
203	(GMT+06:30) Yangon (Rangoon)
205	(GMT+07:00) Bangkok, Hanoi, Jakarta
207	(GMT+07:00) Krasnoyarsk
208	(GMT+07:00) Barnaul, Gorno-Altaysk
209	(GMT+07:00) Hovd
210	(GMT+08:00) Beijing, Chongqing, Hong Kong, Urumqi
211	(GMT+07:00) Tomsk
215	(GMT+08:00) Kuala Lumpur, Singapore
220	(GMT+08:00) Taipei
225	(GMT+08:00) Perth
227	(GMT+08:00) Irkutsk
228	(GMT+08:00) Ulaanbaatar
229	(GMT+09:00) Pyongyang
230	(GMT+09:00) Seoul
231	(GMT+08:45) Eucla
235	(GMT+09:00) Osaka, Sapporo, Tokyo
240	(GMT+09:00) Yakutsk
241	(GMT+09:00) Chita
245	(GMT+09:30) Darwin
250	(GMT+09:30) Adelaide
255	(GMT+10:00) Canberra, Melbourne, Sydney
260	(GMT+10:00) Brisbane
265	(GMT+10:00) Hobart
270	(GMT+10:00) Vladivostok
274	(GMT+10:30) Lord Howe Island

Enum	Time zone
275	(GMT+10:00) Guam, Port Moresby
276	(GMT+11:00) Bougainville Island
277	(GMT+11:00) Norfolk Island
278	(GMT+11:00) Sakhalin
279	(GMT+11:00) Chokurdakh
280	(GMT+11:00) Solomon Is., New Caledonia
281	(GMT+11:00) Magadan
284	(GMT+12:00) Coordinated Universal Time+12
285	(GMT+12:00) Fiji
290	(GMT+12:00) Auckland, Wellington
295	(GMT+12:00) Anadyr, Petropavlovsk-Kamchatsky
299	(GMT+12:45) Chatham Islands
300	(GMT+13:00) Nuku'alofa
301	(GMT-05:00) Chetumal
302	(UTC+02:00) Khartoum
303	(GMT-03:00) Punta Arenas
304	(GMT+04:00) Volgograd
305	(GMT-07:00) Yukon

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

# Reports overview

Article • 09/04/2024

Reports are a collection of charts and visuals, built with Microsoft Power BI. They're based on a data set to get a quick view into core metrics. Resource and operations managers can monitor key operational metrics to gauge the performance of resources and their scheduling strategy. Reports can help explore important business-related questions, such as:

- Are my resources being used efficiently over a given time period?
- What is the average discrepancy between estimated and actual completion times for tasks and work orders?
- Are tasks and resources being matched effectively?

With answers to these questions, scheduling managers can develop an effective resource scheduling strategy and that saves cost and time and improves customer experiences.

Dynamics 365 Field Service and the Resource Scheduling Optimization Add-in provide reports that focus on different scenarios and user needs:

- The [Resource and utilization report](#), which is included with Field Service.
- The [Work order summary report](#), which is included with Field Service.
- The [Admin report](#), included with the Resource Scheduling Optimization Add-in.
- The [Optimization summary report](#), included with the Resource Scheduling Optimization Add-in.

Other than editing filters and drill-down actions, the reports aren't configurable or customizable.

## **Important**

Reports are intended to help dispatchers or scheduling managers improve their scheduling strategies and more efficiently schedule resources to improve customer satisfaction. Reports are not intended for use in making, and should not be used to make decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements.

Customers are solely responsible for using Dynamics 365, including this Reports feature, and any associated feature in compliance with all applicable laws, including laws relating to accessing individual employee analytics and location.

# Prerequisites

Reports are only available to users with **System Administrator** or **Field Service-Administrator** security roles.

 Expand table

Report name	Required apps
Resource and utilization	Field Service
Work order summary	Field Service
Admin report	Field Service Resource Scheduling Optimization Add-in
Optimization summary	Field Service Resource Scheduling Optimization Add-in

## Refresh cadence and data retention

The system refreshes the reports automatically once a day (every 24 hours). The report shows a time stamp in the top right corner when it was last updated.

A warning icon next to the time stamp on the report indicates a delay or an issue with the data refresh. Contact your system administrator to investigate or open a support ticket if the issue persists.

The system pauses the data refresh for reports that aren't opened for two weeks. When a user opens the report again, data will get refreshed in the next refresh cycle.

Report data get retained for 24 months. Storage file size automatically increases when using analytics features. If this increase causes issues or concerns, contact Microsoft Support.

## Provide report access to a security role

Administrators can provide access to reports through security roles.

1. In Field Service, go to **Advanced Settings**.
2. Go to **Settings > Security**.
3. Go to **Security Roles**.

4. Select the security role that needs access to the reports (for instance, **Field Service – Dispatcher**).

5. Select **Show all tables**.

6. Search for and select each of the following reports. Then, select the Read privilege for the report.

- Field Service historical analytics - work order summary report
- Resource scheduling historical analytics - admin and optimization summary report

7. **Save and Close**.

Now the **Field Service - Dispatcher** can see the corresponding report.

## Supported regions for reports

Expand table

Region	Name
North America	NAM
South America	SAM
Canada	CAN
Europe (except Germany)	EUR
Asia Pacific Japan	APJ
Australia	OCE
Japan	JPN
India	IND
United Kingdom	UK
United Arab Emirates	UAE

## Data model

The system uses the following list of entities to generate reports. If there's no data or you customized these entities, parts of it might show blank.

Field Service entities:

- *bookableresource*
- *bookableresourcebooking*
- *msdyn\_resourcerequirement*
- *territory*
- *calendarrule*
- *bookableresourcegroup*
- *bookingstatus*
- *msdyn\_bookingtimestamp*
- *organization*

Resource Scheduling Optimization entities:

- *resource*
- *bookableresource*
- *territory*
- *bookableresourcebooking*
- *msdyn\_optimizationrequestbooking*
- *msdyn\_resourcerequirement*
- *msdyn\_priority*
- *msdyn\_routingoptimizationrequest*
- *msdyn\_routingprofileconfiguration*
- *calendar*
- *calendarrule*
- *bookableresourcegroup*
- *bookingstatus*
- *organization*

## Next steps

- [Resource and utilization report](#)
- [Optimization summary report](#)

---

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

# Configure scheduling parameters

Article • 07/23/2024

Define settings for scheduling your resources.

1. In Dynamics 365 Field Service, select the **Resources** area.
2. Under **Administration**, select **Scheduling Parameters**.
3. Select **Resource Scheduling** in the list.
4. Select the tab for the settings that you want to change, and then fill in the information as required. The following sections describe the settings on each tab.
5. Select **Save** to apply your changes.

## General

[[ Expand table

Field	Description
Schedule Board Refresh Interval Seconds	Define how often the schedule board is refreshed.
Auto Update Booking Travel	Enable or disable automatic updates to travel time and distance in the hourly view of the schedule board.
Include Appointments	Enable <a href="#">tracking of appointments for resources</a> on the schedule board.
Connect to Maps	Enable a <a href="#">mapping service</a> to calculate travel and show maps. If you want to use a specific map, enter the map API key. By default, Bing is used.

## Schedule assistant

[[ Expand table

Field	Description
Default Radius Unit	Select <i>miles</i> or <i>kilometers</i> .
Default Radius Value	Select the default radius that the schedule assistant uses when it searches for resources for work orders. For example, if you select a 20-mile radius, the schedule assistant finds resources within 20 miles of the work order booking location.

Field	Description
Include Outlook Free/Busy in Search	Select whether the system should include the resource's Outlook schedule when it searches for resource availability in the scheduling API.
Resource Availability API	

## Geo data

Field Service integrates with third-party providers to enable the real-time location of resources or vehicles to appear on schedule maps. Use these settings to map the integrated location data to the Field Service system.

[\[+\] Expand table](#)

Field	Description
Enable Custom Geolocation	Select whether the system should use a custom entity for its source of geolocations for resources in the map view.
Custom Geo Location Entity	The logical name of the customer entity for geolocations.
Custom Geo Resource Field	The logical name of the resource for geolocations.
Geo Location Refresh Interval Seconds	Define how often, in seconds, the system checks for the updated geolocation of a frontline worker's mobile device that runs Field Service (Dynamics 365 mobile app) or a custom GPS device.
Custom Geo Latitude Field	The logical name of the latitude for geolocations.
Custom Geo Longitude Field	The logical name of the longitude for geolocations.
Custom Geo Timestamp Field	The logical name of the timestamp for geolocations.
Geo Location Expires After X Minutes	Define how long, in minutes, the geolocation from a previous synchronization persists. For example, if you set the value to 60 minutes, the geolocation of a frontline worker persists for 60 minutes after synchronization and is shown as the worker's current location on the schedule board. After 61 minutes, the location reverts to either the location of the previous work order or the resource's starting location.

# Resource Scheduling Optimization

This tab appears only if your organization uses [Resource Scheduling Optimization](#).

[Expand table](#)

Field	Description
Enable Resource Scheduling Optimization	Enable or disable automated scheduling in the environment.
Default Goal	An <a href="#">optimization goal</a> is what the Resource Scheduling Optimization solution aims to optimize. Examples of optimization goals include maximizing working hours and minimizing travel time. A default goal helps speed up interactions with Resource Scheduling Optimization within the schedule board by predefining how the engine optimizes data. <a href="#">Single Resource Optimization</a> is the default goal.

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback](#) 

# Dynamics 365 Field Service mobile app overview

Article • 08/28/2024

Service technicians and frontline workers are the essence of any field service organization. They're the vanguard of providing excellent customer service. It's critical that frontline workers have the best digital tools that enable them to engage with their peers, the back office, and customers while staying on top of their field duties. The Field Service mobile app enables technicians and frontline workers to perform better service and achieve high first-time fix rates.

The app is available for [Apple iOS](#), [Google Android](#), and [Windows 10+ devices](#). It's included in your Field Service license at no extra charge.

<https://www.microsoft.com/en-us/videoplayer/embed/RWN1Bb?postJs||Msg=true>

The mobile app is built on Microsoft Power Platform as a [model-driven app](#), which makes it customizable to your business needs.

In 2024, Microsoft released a refreshed user experience for parts of the mobile application. Administrators can enable the new experience for their users. For more information, see [Set up the Field Service mobile app](#).

## Feature list

[\[+\] Expand table](#)

Feature	Persona	Supported	Details
<a href="#">Camera capture (photo + video)</a>	Technician	Yes	Use the device camera to capture images and video.
<a href="#">Barcode scanning</a>	Technician	Yes	Scan bar code from global search or at a field level.
<a href="#">Offline data</a>	Technician	Yes	Offline-enabled application allows you to access your data regardless of internet connectivity.
<a href="#">Calendar view</a>	Technician	Yes	Customize your calendar with data relevant for your organization.
<a href="#">Driving directions</a>	Technician	Yes	Use your favorite in-app map application for turn-by-turn directions.

Feature	Persona	Supported	Details
Speech to text	Technician	Yes	Insert notes with native device speech-to-text capabilities.
Microsoft Intune	Integration	Yes	Provide an extra layer of device and data protection with Microsoft Intune.
Time entry	Technician	Yes	In-application Time Entry enabled by default.
Connected Field Service and IoT alerts	Technician	Yes	Receive IoT signals and send commands directly from your mobile app.
Inspections	Technician	Yes	A Field Service technician can find and capture inspections associated with a work order.
Dynamics 365 Remote Assist	Integration	Yes*	Get help from remote collaborators with integrated Dynamics 365 Remote Assist.
Push notifications	Technician	Yes	Send user notifications, such as a new booking appointment and other out-of-the-box triggers.
Geofencing	Technician	Yes	Automatically set booking status as a technician arrives or leaves a location.
Reporting	Technician	Yes	Generate customer service reports with a signature, with the option to email a PDF.
Scan to find asset (Global search)	Technician	Yes	Not applicable
Location sharing and auditing	Admin	Yes	Enable real-time sharing of the technician's location with the back office.
Enhanced offline sync filters	Admin	Yes	Data available offline by default and the data available offline can be customized. For example, offline data available by location or by accounts for scheduled bookings.
Offline by default	Technician	Yes	The app is offline by default, so the technician is always ready.
Allow technician to force data sync	Technician	Yes	The technician can manually force data sync.
Bulk-add users	Admin	Yes	Quickly assign an offline data sync profile to users.
Checklist for service tasks	Technician	Yes	Use a checklist to quickly mark a task as complete.

For information about planned features, see [Dynamics 365 Field Service release plans](#).

## Next steps

- [Install and set up the mobile app](#)
  - [Set up offline data and sync filters](#)
  - [Download and install the app on a mobile device](#)
- 

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback](#) 

# Set up the mobile app

Article • 08/28/2024

The Dynamics 365 Field Service mobile app is designed and optimized for technicians in the field. They can work with Field Service work orders, customer assets, accounts, and contacts. The app is built on Microsoft Power Platform as a [model-driven app](#). You can customize it to your business needs like other [model-driven apps](#).

For a guided walkthrough, check out the following video.

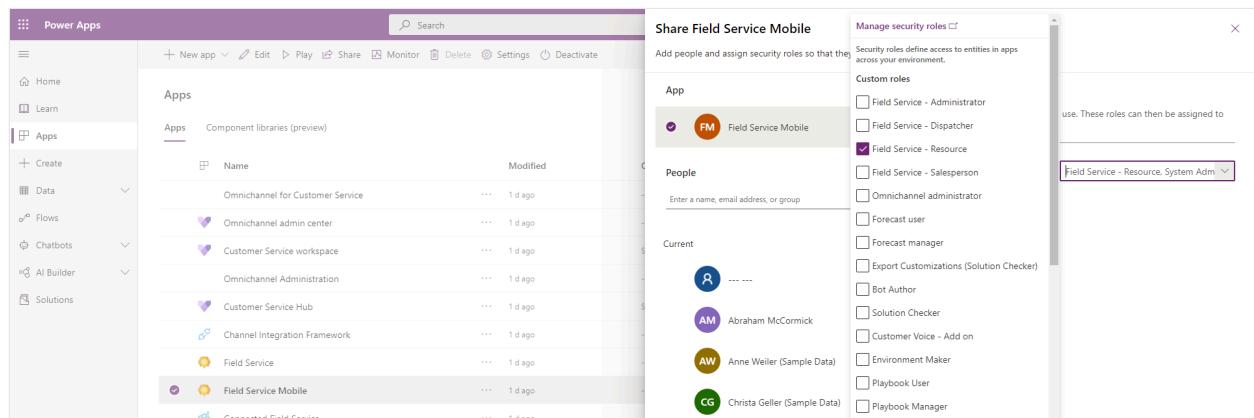
<https://www.microsoft.com/en-us/videoplayer/embed/RE4HKRL?postJs||Msg=true>

## Prerequisites

To use the Field Service mobile app, you need [Field Service installed](#) and [set up](#).

## Assign security roles to the Field Service mobile app

1. Go to <https://make.powerapps.com/> > **Apps** in the left pane.
2. Find the **Field Service Mobile** model-driven app and select the ellipses (...).
3. Select **Share** and assign the app to **Field Service-Resource**, **Field Service-Administrator**, or other security roles that need access to the mobile app.



## Assign mobile app users appropriate security roles

Assign Field Service users the **Field Service-Resource** security role and **Field Service-Resource** field security profile. For more information, see [Set up users, licenses, and security roles](#). Alternatively, go through the [frontline worker setup](#) to quickly create a frontline worker and automate setup steps.

Users with these security roles can sign in to the mobile app as a technician.

## Refreshed mobile user experience

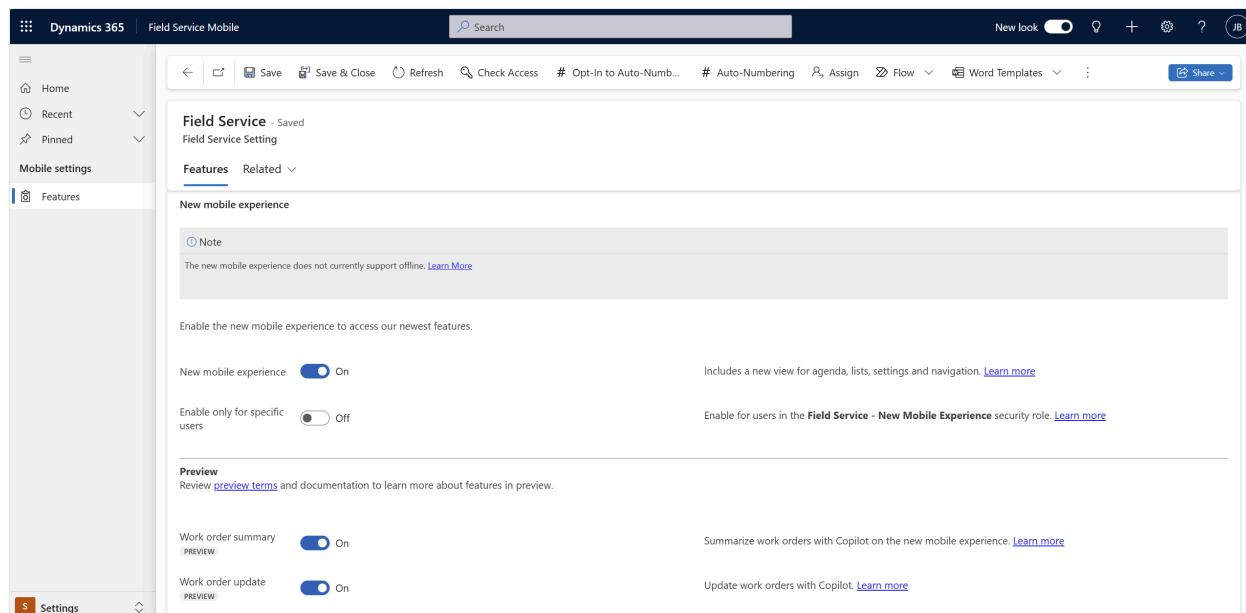
The refreshed user experience in the Dynamics 365 Field Service mobile app helps service technicians swiftly access all the information they need. It offers familiar mobile navigation, gestures, and controls to manage work orders, tasks, services, and products. Technicians save valuable time with Copilot in Field Service to quickly update the status of a booking or get a summary of a work order. They can even get detailed information about tasks with [embedded Dynamics 365 Guides](#), which provides step-by-step instructions, pictures, and videos.

Configuration options for the refreshed mobile user experience are in the settings area of the Field Service Mobile app module. Makers in an organization can access these settings to enable the new user experience and its features.

If you use a custom app module and don't see the settings area, [review the troubleshooting guide to show the settings area](#).

## Enable the new mobile user experience

You need Field Service - Administrator permissions to enable the refreshed user experience.



1. Open the Field Service Mobile app module in a web browser.
2. Change to the **Settings** area and go to **Mobile settings > Features**.
3. Turn on the **New mobile experience** setting to see all configuration options for the new experience. You can enable the new experience for all users in the environment or individual users. If you choose to enable it for individual users only, existing users will continue to receive the Unified Interface experience while users with the **Field Service – New Mobile Experience** security role will get the new mobile experience.
4. Save the changes and [publish the updated app](#) to make them visible for your users.

Users don't need to download a new app. However, make sure you have at least the app version 2408.2 and the solution version 8.8.122.6 installed.

## Turn on features for the refreshed experience

After enabling the new mobile experience, you can choose to enable preview features, such as copilot skills that are available in the new mobile experience.

1. Open the Field Service Mobile app module in a web browser.
2. Change to the **Settings** area and go to **Mobile settings > Features**.
3. In the **Preview** section, enable the features that your users can access:
  - [Summarize records with Copilot in Field Service \(preview\)](#)
  - [AI-powered work order update \(preview\)](#)

## Limitations of the new experience

- Offline mode isn't supported. Users who are enabled for offline use don't see the new experience. If a user is in offline mode while trying to access the new mobile experience, they fall back to the classic Unified Interface experience instead.
- The new experience isn't available in the [Windows app](#) and the app shows the Unified Interface experience instead.

## Download the app and sign in

Download the Field Service mobile app for your preferred platform and sign in with your user credentials.

## Next steps

- Set up offline data and sync filters
  - Five tips for implementing the Field Service mobile app ↗
  - Get started with Dynamics 365 Field Service
- 

## Feedback

Was this page helpful?

 Yes

 No

Provide product feedback ↗

# Set up the mobile offline profile

Article • 11/08/2024

Field Service comes with an offline profile that has default settings for Field Service record types. Administrators control what data the Field Service mobile app downloads with the offline profile. In the offline profile, you can:

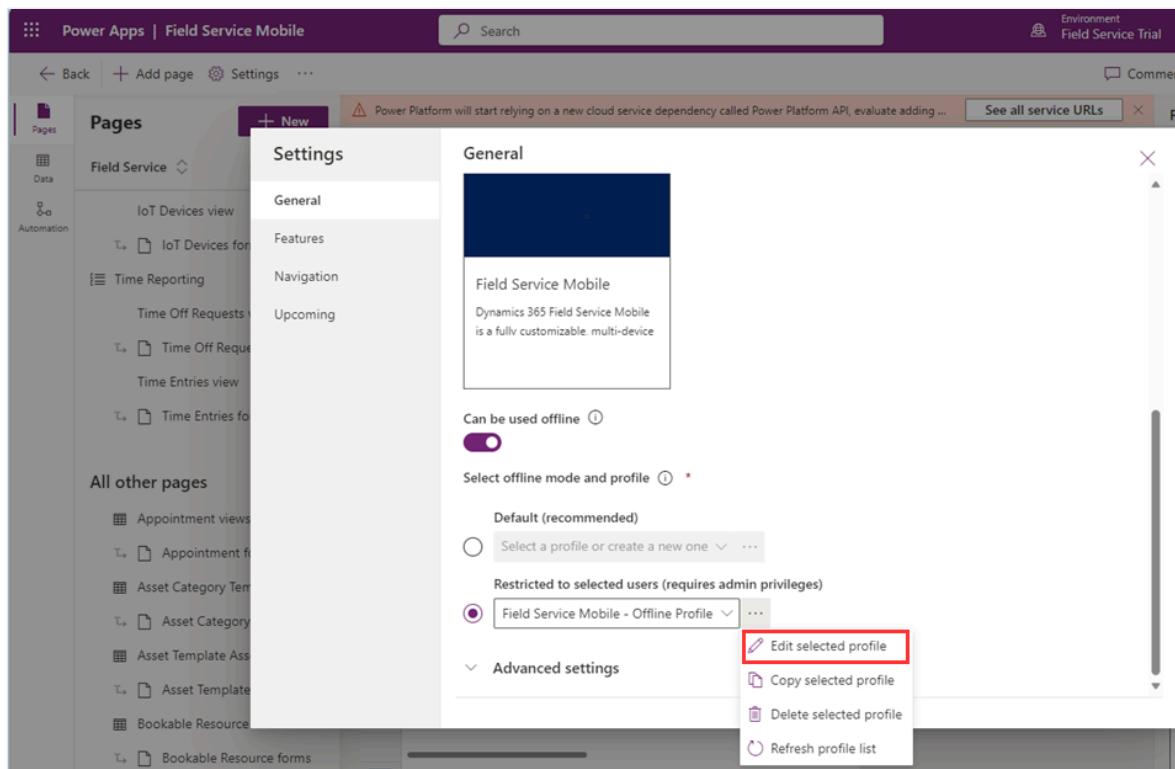
- Define record types that are available offline and how often they sync.
- Define filters for each record type. For example, by default the offline profile downloads bookings that start within the next seven days.
- Set up item association by creating relationships between tables. Item association saves time because not every record type needs a filter. Associated records follow the filters that are set on the related record type.

## Prerequisites

- You have admin privileges in Dynamics 365 Field Service.
- You have access to Power Apps.
- [Review the best practices for using the offline profile.](#)

## Set up the default mobile offline profile

1. Sign in to Power Apps at <https://make.powerapps.com/>, and select your environment.
2. Select **Apps**, and then open **Field Service Mobile**.
3. Select **Settings**, and then select the **General** tab.
4. Scroll to **Select offline mode and profile**.
5. Choose which users should have access to the mobile app offline:
  - **Default (recommended)**: All your users who have access to the app can also use it in offline mode.
  - **Restricted to selected users (requires admin privileges)**: Restrict access to the app in offline mode to certain users.
6. Select the ellipsis (...) next to **Field Service Mobile - Offline Profile**, and then select **Edit selected profile**.



7. If you chose to restrict access to selected users, [add those users now](#). Otherwise, go to the next step.

8. Review the **Data for offline use**. For each table:

- Select a table, and then select **Edit**.

## ← Edit Bookable Resource Booking



Choose which records are available offline. Be selective to minimize the data download impact on people's devices. [Learn more](#)

Choose the rows that you want to make available offline \*

Organization rows

All rows

Related rows only ⓘ

Custom

Include Bookable Resource Booking rows related to these tables ⓘ

▼ Relationships (0/23)

Include these files and images ⓘ

▼ Files (0/0)

▼ Images (0/0)

Sync frequency ⓘ

Every 5 minutes

Save

Cancel

- Select the rows or filters, relationships, files, and images to make available offline.
- Select the sync frequency.
- Select **Save**.
- [Add a table to the offline profile if needed.](#)

### 9. Save the offline profile.

The default offline profile is updated periodically as part of Field Service updates. If you edit a table's offline sync filter, the sync filter isn't updated. Table sync filters that haven't been edited are updated, but the updates are unpublished. Administrators can review the updates and decide to take them or continue with the previous sync filters. This only applies to sync filters. Relationships receive updates while keeping your specific changes.

If you have user roles that need different sync settings or tables available offline, you can [create more offline profiles](#). For example, a Field Service manager might need to view a broader scope of work orders than the ones that are assigned to a field

technician. If you create an offline profile, remember to add it to the Field Service mobile app in the app designer.

## Optimize columns included within the offline profile (Preview)

You can optimize the mobile offline profile by selectively enabling columns to include with a sync. For guidance and best practices, see [Optimize downloaded data with Offline Table Column Selection \(Preview\)](#).

## Move a mobile offline profile between environments

To control changes and keep your offline profiles in sync, your organization might require that you make changes to the profiles in one environment and then move them into other environments.

1. Sign in to Power Apps at <https://make.powerapps.com/>, and select your environment.
2. Select **Apps**, and then open **Field Service Mobile**.
3. Select **Settings**, and then select the **General** tab.
4. Scroll to **Select offline mode and profile**.
5. Select the ellipsis (...) next to **Field Service Mobile - Offline Profile**, and then select **Copy selected profile**.
6. Modify the copied profile as needed.
7. [Create a managed solution](#) that includes the mobile offline profile.
8. Export the managed solution from the original environment.
9. Import the managed solution into the new environment.

## Best practices for offline mode

Our team recently published a series of blog posts with additional details around using the offline profiles in the Field Service mobile app, including best practices and advanced scenarios.

- Best Practices for Offline Mode in the Field Service mobile app – Part 1 [↗](#)
  - Best Practices for Offline Mode in the Field Service mobile app – Part 2 [↗](#)
  - Best Practices for Offline Mode in the Field Service mobile app – Part 3 [↗](#)
- 

## Feedback

Was this page helpful?

 Yes

 No

Provide product feedback [↗](#)

# Configure offline data synchronization

Article • 11/08/2024

After the offline profile is set up and data is downloaded to the mobile device for the first time, the mobile app always runs [offline-first](#). Prioritizing offline use optimizes the app's performance. It also creates a consistent experience for field technicians as they move through areas with and without an Internet connection.

## Sync intervals

Sync intervals define how often data automatically syncs on users' devices. They can be as short as five minutes or as long as one day. With variable sync intervals, administrators have greater control over data sync and can help improve app performance. Records that change often can sync more often, and records that don't change as often don't need to sync as often.

The default offline profile, **Field Service Mobile - Offline Profile**, has predetermined sync intervals for each record type, based on typical usage patterns.

A sync is initiated only when the app is active and the device is connected to the Internet. On Android and iOS devices, after the sync is initiated, it can complete even if the [app is in the background](#).

Dependencies that are based on selected relationships and custom filters that include related tables are analyzed during each sync request. A sync interval for a table might not be respected if a related table has a lower sync interval.

## Sync settings and online mode (preview)

Admins can [enable more sync settings](#) for end users to provide more control over the sync experience. For example, an option to sync only when the device is connected to a Wi-Fi network. These settings can help save mobile device bandwidth and battery life when technicians work in areas with regularly poor cellular connectivity.

Admins can also [activate online mode](#) for the offline-first application. This setting provides frontline workers the option to switch from offline mode to online mode, allowing them to view live Dataverse data outside the parameters of their offline profile configuration. While in this mode, the application continues to sync data and changes back to offline mode if network connection is lost.

# Sync conflicts

Sync conflicts happen if there's a mismatch between data on the device and data on the server. That can happen when a field technician and a dispatcher edit the same work order without synchronizing their changes. The system doesn't know which modification to apply to the record because it gets conflicting information.

Conflicts happen at the table level, not the field level. For example, if a field technician changes the *Start Time* of a work order and a dispatcher changes the *End Time*, that's a conflict. The system doesn't try to merge changes field by field. Instead, it looks at the entire record and tries to determine which one to keep.

Conflicts are resolved based on what the administrator selects for the **Set conflict detection for mobile offline synchronization** setting. This setting is available in the [mobile client system settings](#).

- **No:** The system doesn't check for conflicts when an offline device comes back online. The changes the field technician made offline "win," overwriting the changes the dispatcher made. This setting is the default.
- **Yes:** The system checks for conflicts when an offline device comes back online. The changes the dispatcher made "win," overwriting the changes the field technician made offline. The field technician might see a sync conflict error.

[Learn more about working offline.](#)

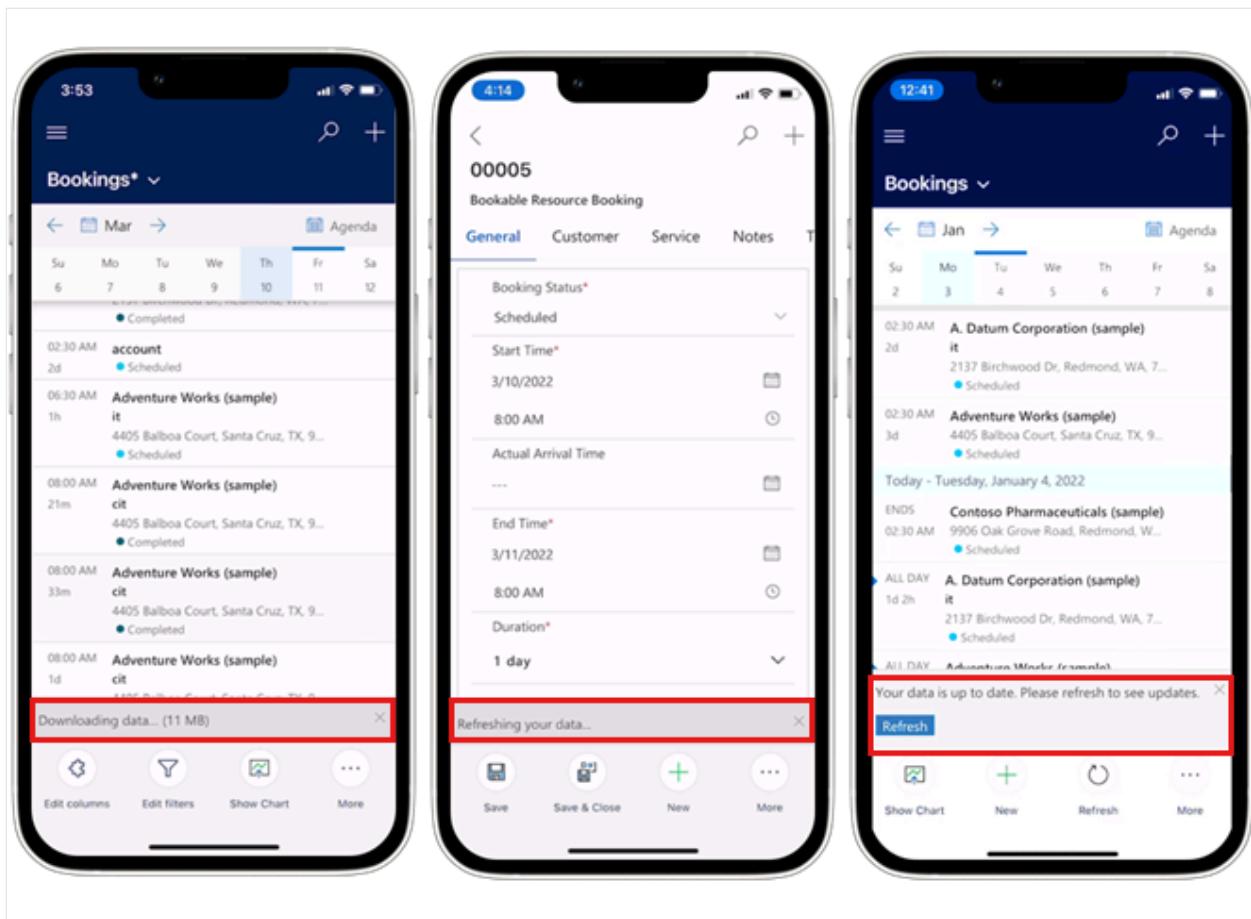
Administrators can view past sync errors by going to **Settings > Sync Errors**.

# Sync notifications

Users receive an in-app notification when:

- The app is downloading data during the initial sync.
- The user selects **Refresh** on a table.
- A large incremental sync runs after the app hasn't been used for a while.

The notifications appear while the sync is in progress. After a large incremental sync is finished, the user can refresh the view to get the latest updates.



## View offline sync status

The **Offline Status** page in the app shows the last date and time that synced tables were updated.

The [offline sync icon](#) shows the sync status of the mobile app itself. It's always visible in the main app navigation on Windows, iOS, and Android devices. Know at a glance whether your app is connected to the network, a sync is in progress, or there are sync errors.

To view details, select the offline sync icon to open the [Device Status page](#).

If the app detects a weak or no network connection, the message "Network or Service Unavailable" appears. The app doesn't sync new data, and some network-dependent features of the app, such as maps or Dataverse searches, don't work. The following events can cause the app to display this message:

- The app boots into offline mode before it detects the network's availability.
- The app's network check gets no response or the response takes too long.

## Analyze telemetry for offline synchronization

Data related to offline synchronization events can be used to evaluate the health and performance of the offline sync.

You can set up an [Application Insights](#) environment to receive telemetry on diagnostics and performance. You can enable or disable the telemetry feed at any time.

For detailed information about the data you can get, see [Telemetry events for mobile app synchronization and actions](#).

## Data removal from the mobile device

After a sync, data that no longer meets the offline profile filter criteria might be removed from the mobile device. Data removal is most common in two instances:

- After the first sync. For example, a field technician might see all past bookings while online, but after moving to an area without connectivity, see only bookings that start today or in the future.
- After an incremental sync. For example, if the mobile offline profile filters out completed bookings, a newly completed booking is removed from the agenda after a sync and no longer accessible in the app.

If a user is viewing a record that's removed from the mobile offline database, the app shows a **Record Not Found** error. If this error appears frequently, we recommend you review the filters to make sure that they aren't overly restrictive.

If the mobile app is reset, the offline database on the device is cleared.

## Next steps

- [Configure the mobile offline profile](#)
- [Mobile offline capabilities](#)

---

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

# Best practices and limitations for the offline profile

Article • 12/13/2024

Field technicians often need to work in areas without Internet access, like remote places or underground. When an admin [sets up the Field Service mobile offline profile](#), technicians can continue using the mobile app when there's no Internet connection. Important data syncs to the device for viewing in the field. Changes on the device are stored locally, and then uploaded automatically when an Internet connection becomes available.

Read our blog post about [best practices for offline mode](#).

Even if you think your field technicians will always have a reliable Internet connection, we strongly recommend that you set up offline capabilities to create a fast and consistent experience.

The offline profile manages offline record types, relationships, and user assignments. For a guided walkthrough, watch this brief video.

<https://www.microsoft.com/en-us/videoplayer/embed/RE4J8no?postJsIMsg=true>

The Field Service mobile app follows the same architecture and security as a Power Apps mobile app. [Learn more about Power Platform security](#).

## Best practices for using the offline profile

Before you set up the offline profile, consider these important guidelines:

- **Use the default offline profile.** Although you can create your own mobile offline profile, we highly recommend that using the default offline profile provided by Field Service. The **Field Service Mobile - Offline Profile** provides an ideal starting point for offline scenarios. It has common Field Service tables preconfigured for offline use, and recommended filters to limit the data that gets downloaded. Build on it by including your custom record types. Make sure to limit the amount of data you include in the offline profile for the best sync performance.

The default offline profile receives updates to unchanged table sync filters. You can copy the default profile and make changes to the copy, but the copy is unmanaged and doesn't receive any updates.

If you make changes to the default offline profile and want to see the latest offline profile later, create a new trial of Field Service.

- **Don't remove default record types from the offline profile.** We purposefully added default record types to make sure that the right data is available to field technicians. Focus on adding the record types you need rather than removing ones you don't.
- **Don't use "All records" as an offline filter.** The offline profile is the gate that controls the amount of data to download to users' devices. Technically, there's no limit to the number of records the offline profile supports. Practically, however, the less data that gets downloaded the faster and more efficient syncing is. Don't use "All records" as a table filter, and avoid wide date ranges. For example, rather than downloading all customer asset records, download only the records that are related to scheduled work orders. It reduces the number of customer asset records that need to be synced without affecting the work at hand.
- **Use offline JavaScript.** Organizations often need to run workflows on mobile devices to execute business processes. However, Power Automate flows only run when the device has a network connection or on the next sync. If you need to run workflows on the device on-demand and without Internet access, use offline JavaScript instead. [Learn more about workflows and scripts for the Field Service mobile app.](#)

[Learn more best practices for using mobile apps offline.](#)

## Limitations of the offline profile

Keep these limitations in mind when you set up the offline profile:

- [Field Mapping](#) isn't supported in offline mode.
- Records that are created on the device in offline mode and don't meet filter conditions aren't synced until they meet the conditions.
- Make sure that commands or capabilities that are set up for Internet connectivity call the correct APIs: `Xrm.WebApi.online`.
- Tables that support offline use are part of the default **Field Service Mobile - Offline Profile**. You can add tables to the offline profile, but some, such as Purchase Order, Agreements, return to vendor (RTV), and return merchandise authorization (RMA), can't be used offline. If you add these tables and run the app offline, users might get errors.

- The **Field Service Mobile - Offline Profile** can have a maximum of 15 linked tables, including downstream tables. For example, if Table A has a relationship with Tables B, C, and D and Table B has a relationship with Tables F, G, and H, then Table A has six relationships: B, C, D, F, G, and H. Add Table J with a relationship to table K and no relationship with any other table, then the total number of linked tables is seven. [Learn more about profile filter limitations](#).
- Inventory validation doesn't run without network connectivity.
- Access to SharePoint documents isn't supported.
- Access to knowledge articles isn't available in offline mode.
- **Web resources are partially supported in offline mode.** We recommend that you use the [Power Apps component framework](#) to implement custom capabilities that work in both the mobile app and the browser.
- The **Export to PDF** option isn't available while the application is in offline mode. Other options might be hidden while in offline mode or without device connectivity. Learn more: [Ribbon and Command Bar Button is Hidden](#).

## Data reduction checklist

To reduce the amount of data the mobile app uses, consider the following actions:

- Limit customization. To understand how customizations are consuming data, use debugging tools like F12 in the browser or Fiddler with the Windows app.
- [Create an offline profile](#) and enable offline-first mode. Make sure business can be performed offline and large synchronizations can be handled over Wi-Fi.
- Limit views and forms to the minimum required.
- Use default views that filter data to only the data that's important to the field worker. For example, my recent bookings instead of all bookings.
- Allow image resolution to default to smaller file sizes for photo capture.
- Review other [performance considerations for customizing the mobile app](#).

## Next steps

- [Configure the mobile offline profile](#)
- [Offline data synchronization](#)

---

## Feedback

Was this page helpful?

 Yes

 No

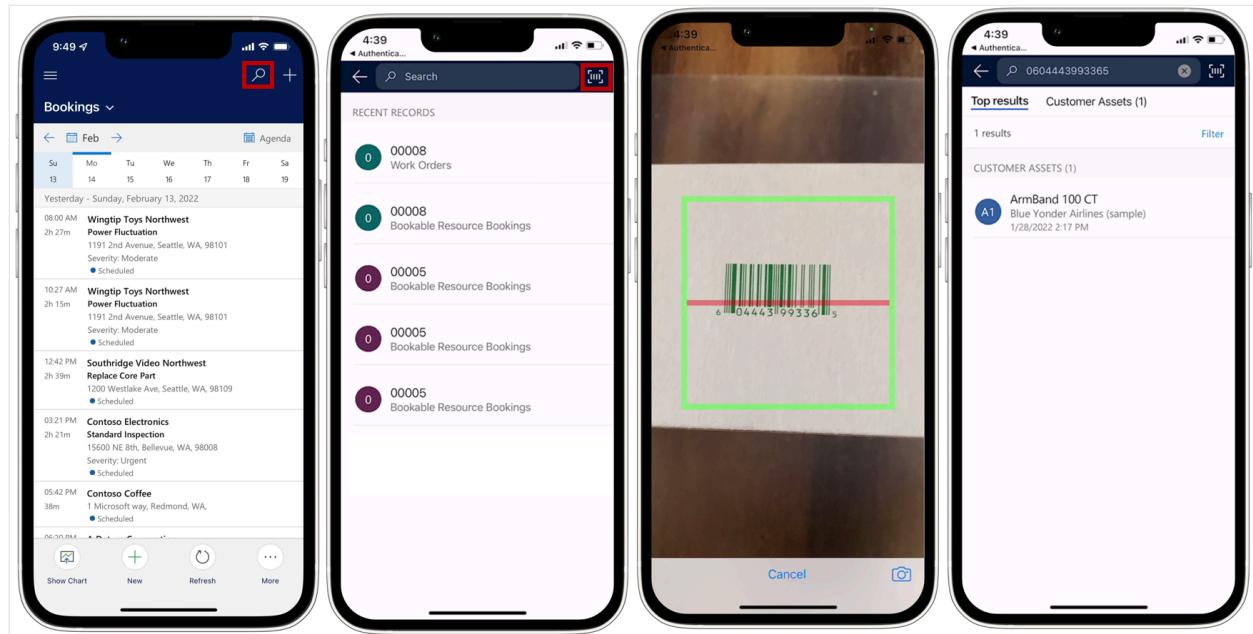
Provide product feedback 

# Configure barcode scanning

Article • 08/28/2024

Technicians can use the Dynamics 365 Field Service mobile app to scan a barcode.

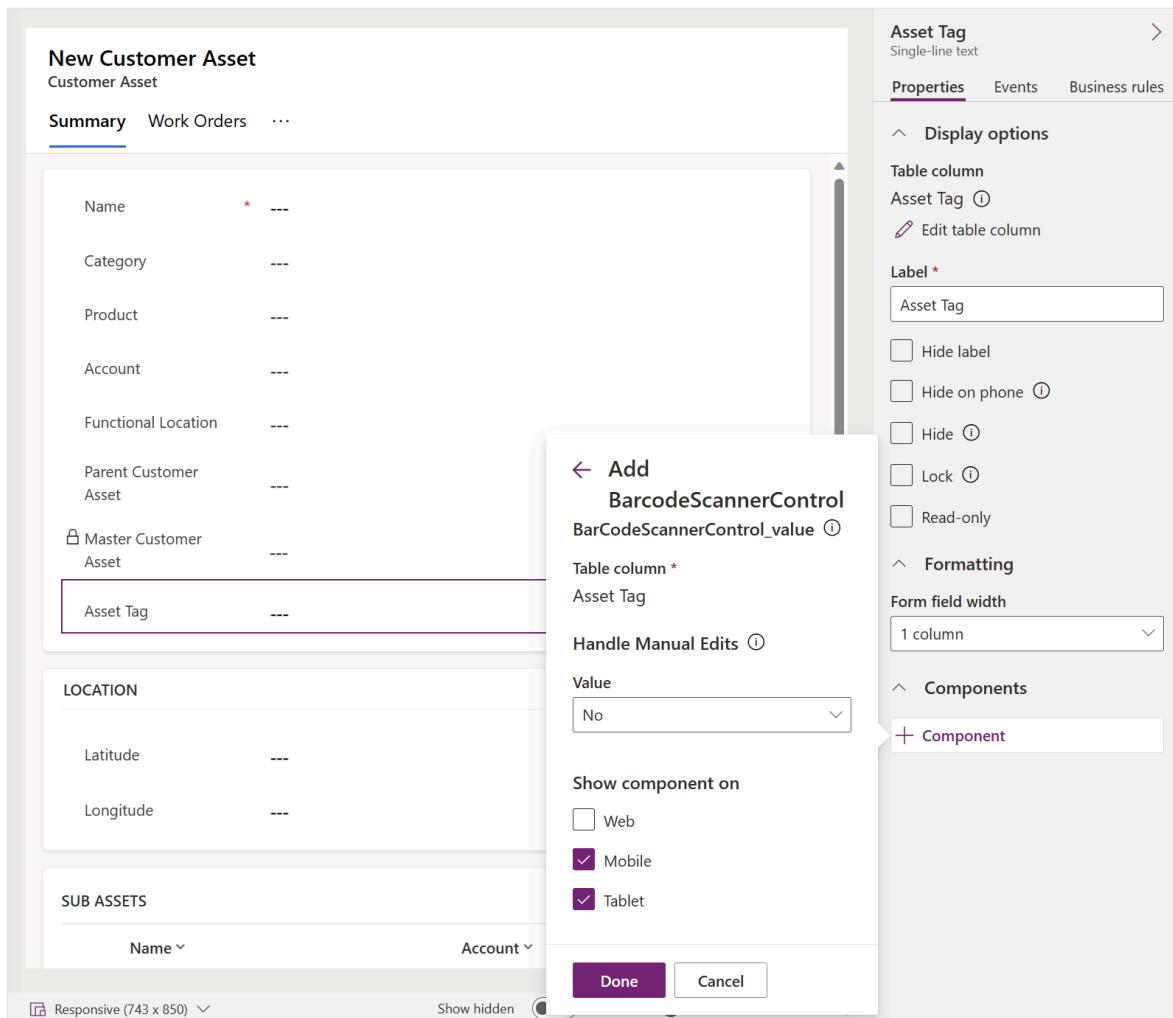
Scanning a barcode simplifies data entry and lets technicians search the database for records that match the barcode for easy lookup.



## Add a barcode field to a form

Make sure there's a barcode field on the form you want to add the barcode information. Customer frequently add the barcode field to the customer asset form. For more information about customizing your app, see [Model-driven app interface design overview](#) and [Overview of the model-driven form designer](#).

1. Find the **Field Service Mobile** app module in your list of Dynamics 365 apps and select the ellipsis (...) > **Open in App Designer**.
2. In the navigation, select the form you want to use barcode scanning on. In the list of available forms, choose the one you want to change and select **Edit**.
3. Add a table column for which you want to use barcode scanning to the form.
4. Select the newly added column and add the **BarcodeScannerControl** component in the **Properties** side pane. Make sure you enable **Show component on** for **Mobile and Tablet**.



## 5. Save and publish the changes.

### ! Note

Currently, the barcode scanner control doesn't support setting control-level error notifications. For more information, see [setNotification docs](#).

## Scan a barcode to populate the field value

In the mobile app, a barcode-enabled field has a barcode icon. Select the barcode icon to open the camera and scan a barcode or QR code. After a successful scan, the barcode value is added to the field. Save the form to write the scanned value to the database.

## Enable search

Field Service uses [Dataverse search](#) and includes a barcode scanner option within the search view. Dataverse search requires an active internet connection. If the device has no connectivity, the search experience falls back to [categorized search](#) experience. If you configure the application to offline-first mode, tables that are indexed for search need

to be added to categorized search. When using the online-only mode, add them to the Dataverse search index.

By default, Dynamics 365 Field Service is configured to search against activity, contact, user, customer asset, incident type, work order, and IoT alert/device. You can customize search to include more record types, such as products. Expanding search parameters can help technicians search, find by keyword, and scan to search by barcode, UPC, or QR code.

To enable a new barcode field for search within a table:

1. If the desired table isn't enabled for search, [follow these steps](#) to enable the table for search.
2. Add the barcode-enabled field to the [table's quick-find view](#).
3. **Save and publish** the changes.

 **Note**

- Create custom integrations using barcode on mobile devices with [getBarcodeValue API](#).
- Currently, global search with barcode scanning isn't available on tablet and Windows versions of the app.

---

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback](#) ↗

# Enable push notifications

Article • 08/28/2024

In the Dynamics 365 Field Service mobile app, push notifications send updates to technicians through their mobile phones or tablets. Push notifications use Microsoft Power Automate and support many scenarios. For example, to notify about a newly assigned booking or as a reminder to capture and enter important data.

There are two ways to enable push notifications for your organization.

1. Enable the push notification cloud flow included with Dynamics 365 Field Service.  
The included push notification notifies technicians when they have been assigned a booking.
2. Create a custom push notification based on custom triggers using the **Send Push Notification V2** connector in Power Automate.

## Prerequisites

- A license and permissions for [Power Automate](#).
- Enabled notifications in your device settings for the Field Service mobile app.
- Review and agree to the [privacy notes for Field Service push notifications](#).

## Turn on push notifications included with Field Service

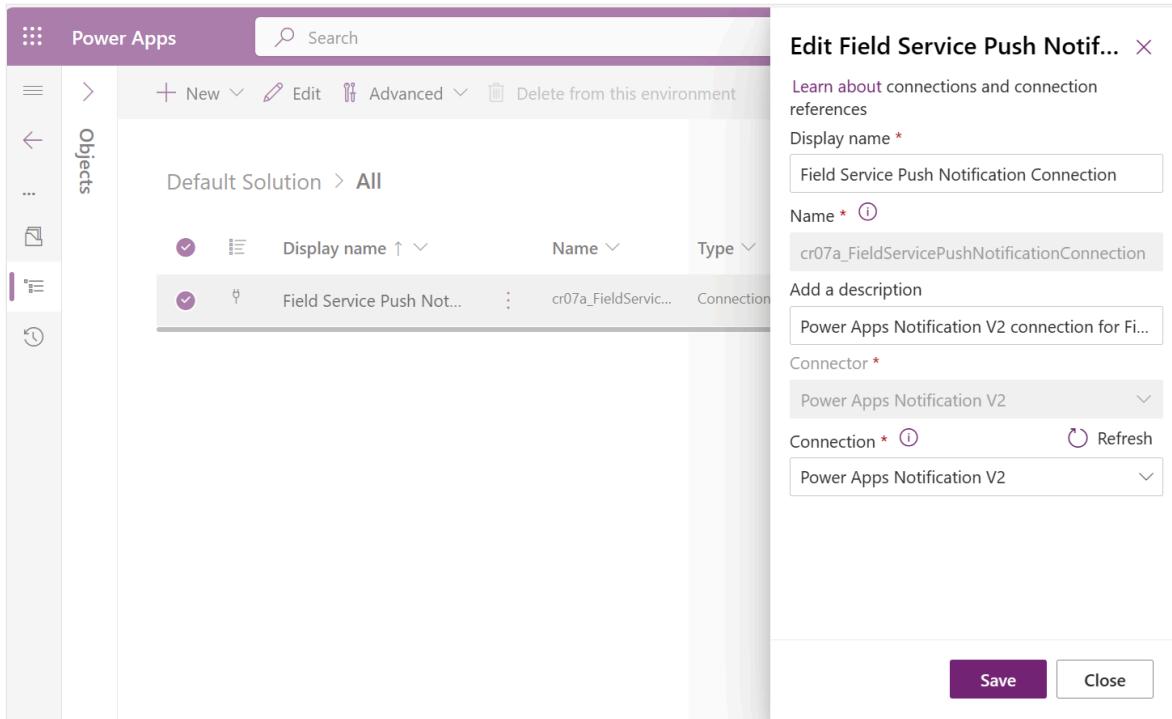
Field Service includes a template to enable push notifications for new bookings. You can also [create push notifications based on custom triggers](#).

Configure the following cloud flow to send frontline workers a push notification on their mobile device when they're booked for a work order.

1. Sign in to [Power Apps](#) and select the environment with your Field Service installation.
2. In the left pane, select **Solutions**. From the list of solutions, select the **Default Solution**.
3. Create two new connection references:

- **Field Service Push Notification Connection**, using the **Power Apps Notification V2** connector.
- **Dataverse Connection Reference**, using the **Microsoft Dataverse** connector.

For both connection references, add a new connection and make sure they're enabled.



4. In the Solutions area, edit the solution with the name `msdyn_FieldService_patch_update`.
5. Open the details of the cloud flow called **Field Service – Notify user about booking (UCI app)**.
6. Select the **Save as** option to create a copy of the cloud flow [add it to an unmanaged solution](#).
7. In the unmanaged solution, select the **Turn On** option for your new cloud flow.
8. Open the details for the **Field Service – Notify user about booking (UCI app)** cloud flow. Make sure the **Connection References** section contains both connection references that you created in step 3.

## Test push notifications

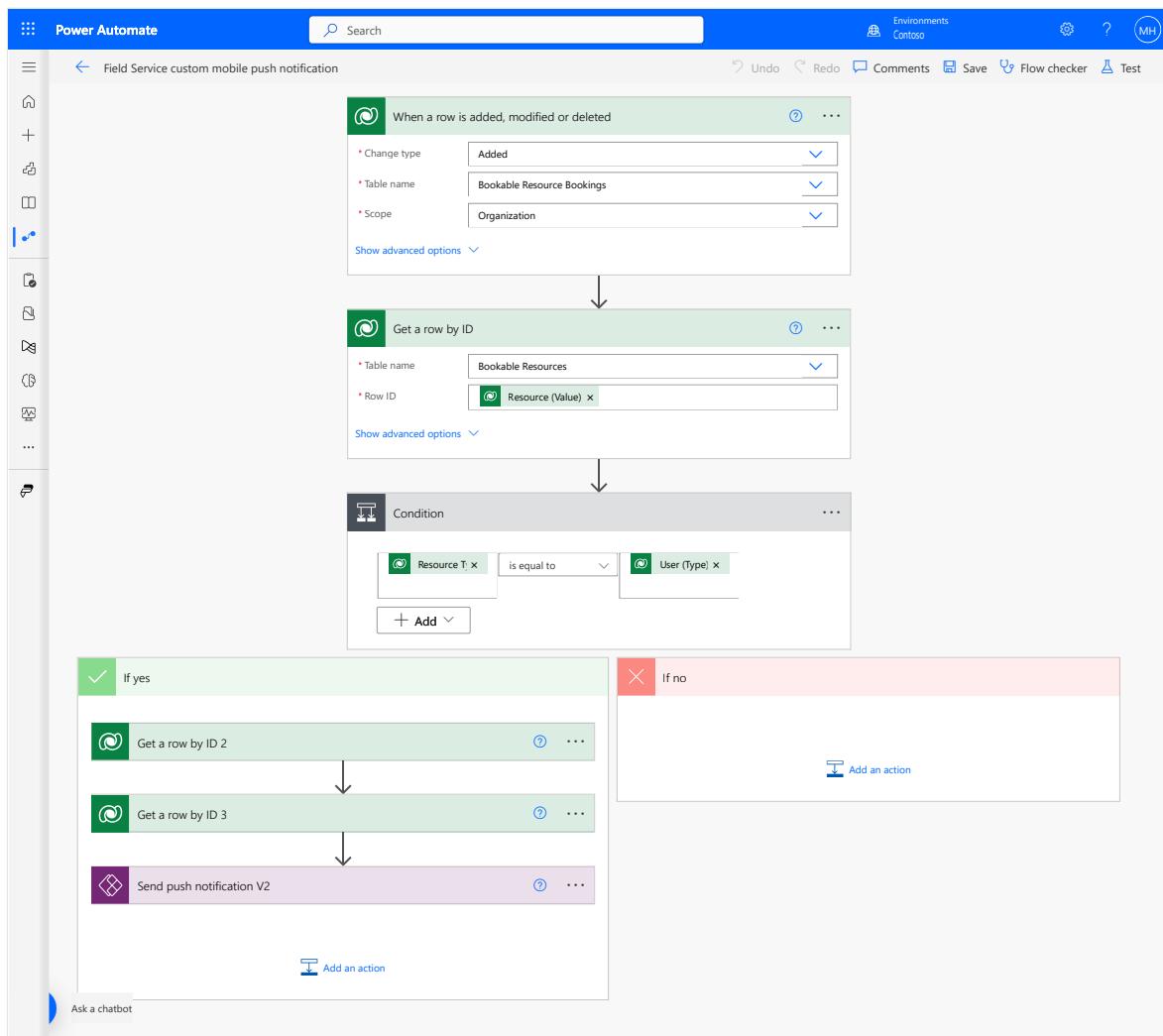
Schedule a work order to a frontline worker that has a user set up for the mobile app.

Within 60 seconds, you should receive a push notification from the Field Service mobile app.

# Create a custom push notification

You can create push notification with custom triggers to match your business scenarios. The following steps outline an example flow that sends a push notification to users of the mobile application when they get a new booking assigned. The notification includes the work order associated to the booking.

1. Sign in to [Power Automate](#) and select **Create**. Power Automate supports hundreds of connectors that can be used to trigger and provide data to the push notifications. You can use any of these triggers to send targeted push notifications to the desired set of users.
2. Select **Automated cloud flow**, give your flow a **Name** and choose the Microsoft Dataverse connector. For this example, we use the Dataverse connector that triggers **When a row is created, updated, or deleted**.
3. Choose the trigger options. In this example, we choose *Added, Bookable Resource Booking, and Organization*.
4. Add another step and choose the **Get row by ID** option to get the associated resource value. Set the table name to *Bookable Resource* and the Row ID to *Resource (Value)*.
5. Add a condition. For our example, we want to send notifications to users, rather than resources that represent equipment, pools, and contractors. Set the condition to *Resource Type* is equal to *User (Type)*.
6. When the condition matches, we need the associated user values. Technicians sign into the mobile app with their Dynamics 365 user credentials. This step ensures that push notifications go to the appropriate users. In the **If yes** box, add a **Get row by ID** option and choose the *User (Value)* row from the *Users* table.
7. To include work order information in the push notification message, configure the flow to get work orders. Add another **Get row by ID** option and choose the *Work Order (Value)* row from the *Work Orders* table.



8. With all information available and the flow logic defined, it's time to add the **Send push notification V2** action.

9. Enter the necessary information to the action:

- Mobile app: Field Service
- Your app: Field Service Mobile

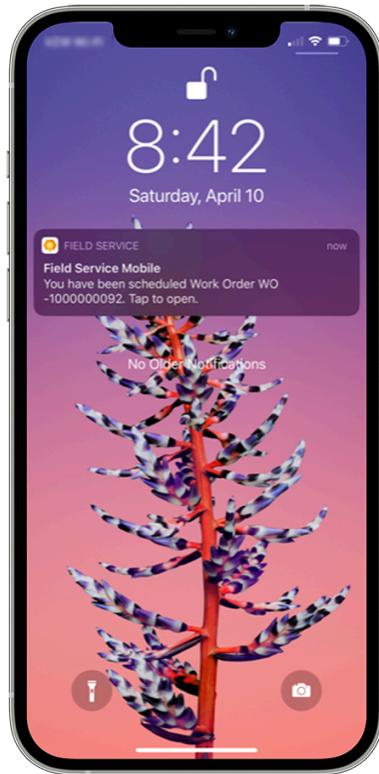
To redirect the technician to the new booking and work order form:

- Open app: Yes
- Entity: Bookable Resource Booking
- Form: Form – Booking and Work Order
- Record ID: Bookable Resource Booking

To provide a custom message:

- Recipients Item: Primary email
- Message: The notification message.

10. The push notifications shows on the technician's mobile phone. They don't need to have the app open or use their device to receive push notifications.



### ⓘ Note

When using mobile offline mode, the device receives the push notification as soon as it has connectivity. Opening the push notification results in a sync to download the record if it's not available on the device. If the sync settings are set to sync on Wi-Fi only, the app will sync the data, even if not on Wi-Fi, when a cellular connection is available.

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

# Share the location from the mobile app

Article • 12/10/2024

Field technicians often travel to various locations throughout their workday, and it's helpful for schedulers to know where technicians are at any given time.

Technicians using the Dynamics 365 Field Service mobile app can enable location sharing from the app, allowing schedulers to visualize their location on the schedule board and see their location history.

For a guided walkthrough, check out the following video. Some features have changed since this video was produced. Refer to the written documentation for accurate feature descriptions and requirements.

<https://www.microsoft.com/en-us/videoplayer/embed/RE4J6mZ?postJs||Msg=true> ↗

## Prerequisites

- Administrator access to Dynamics 365 Field Service.
- Read access to the *msdyn\_geolocationsetting* table for the security role of mobile app users. These permissions are included with the default Field Service - Resource role.

## Enable location tracking

To send a technician's location information to Field Service, enable location tracking in the web application.

1. In the Field Service web app, change to the **Settings** area.
2. Go to **Geolocation** > **Geolocation Settings**.
3. Set **Enable Location Tracking** to **Yes**.
4. Enter a **Refresh Interval (seconds)** to define how often the system checks the location information. We recommend values between 60 and 300 seconds.
5. Set the **Tracking Times** by date for when you want the system to track location data.

## Location tracking events

The *Geolocation Tracking (msdyn\_geolocationtracking)* table stores location information. Users location is captured at the frequency in the Refresh Interval. The users location is

send to the server and stored only during the Tracking Times as set in configuration.

### Note

Location tracking events might be sent less frequently based on the mobile device operating system. This frequency can be influenced by battery savings settings, device battery charge status, and other applications running on the device that might consume device resources.

You can audit location information with other Field Service tables. For more information, see [Auditing overview](#).

You can configure how far back in time a geolocation is valid. This is important for scenarios when a mobile device loses internet connection, making dispatchers unaware of the true location. The time threshold can be configured in **Resource Scheduling > Settings > Administration > Scheduling Parameter > Geo Data > Geo Location Expires After X Minutes**.

## Ask users to allow Field Service mobile to access their location

The app prompts users to allow location access after signing in to the app. The app requests permissions for precise location that are required to update the location consistently. Revoking the listed permissions or not allowing them in the first place will keep the location tracking disabled. To change the permissions retroactively, open the app permissions settings on your mobile device and allow the permissions listed below.

iOS app

To have location tracking work properly, allow the app to use **Precise Location** and set the location tracking to **Always allow** in the device settings.

## Verify that location tracking works

In the Field Service web application, open the schedule board and select a resource that has location tracking enabled. The current location of the resource appears on the schedule board map. Select the map pin icon next to see the resource's detailed location.

 **Note**

Dispatchers can use current locations for schedule assistant travel time calculations by selecting **Real time mode** in the schedule assistant filter pane. For more information, see [Advanced filters for the schedule assistant](#).

---

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

# Create geofences around locations

Article • 08/28/2024

A geofence is a virtual perimeter around a specific location. Geofencing allows users to draw zones around places of work, customer sites, and secure areas. You can configure the system to trigger various actions when geofences are crossed by a person or an equipped vehicle.

In Dynamics 365 Field Service, the default use case for geofencing is to create a circular perimeter around a service account location and compare it to the changing location of field technicians as measured by their mobile devices running the Field Service mobile app. When a work order geofence is crossed by a field technician, a **geofence event** record is created and the geofence status is changed from **outside** to **inside**, indicating the field technician is inside the geofence. Another geofence event is created as the field technician leaves the geofenced area. Based on entering or leaving a geofenced area, a mobile push notification or custom workflow can be triggered.

## Prerequisites

- [Connect to Bing Maps](#) to locate service accounts.
- [Set up auto geocoding for addresses](#) to automatically geocode accounts and work orders when addresses are entered. Geocoding an account or work order record populates latitude and longitude values, which are required to place geofences.
- [Enable location tracking, sharing, and auditing](#) and test location tracking.

## Verify geofence processes are active

Go to **Advanced settings** in the legacy settings area and open **Processes** to ensure the following processes are in an *Active* state:

- `DeleteGeofenceWhenBookingIsCompletedOrCanceled`
- `GenerateGeofenceWhenBookingIsCreated`
- `Update Geofence instance coordinates`

If you have **Enhanced Background Processing** (Preview) set to **Yes** in [Field Service Settings](#), enable the geofence Power Automate flows. In this case, you don't need these processes.

1. Go to <https://make.powerapps.com/> and select your environment.

2. Go to Solutions > Geofencing for Field Service.

3. Enable the following flows:

- Flow – DeleteGeofenceWhenBookingIsCompletedOrClosed
- Flow – GenerateGeofenceWhenBookingIsCreated
- Flow – UpdateGeofenceInstanceCoordinates

## Configure geofencing settings

1. In the Field Service web app, change to the **Settings** area.

2. Go to **Geofencing > Geofencing Settings**.

3. Enter a **Unit of Measure** and **Minimum Radius**. The smallest geofence that the system supports has a radius of 25.59 feet.

## Configure geofence entities

Configure the settings for the entities that use geofences. Custom geofences using entities other than accounts and bookable resources are supported.

1. In the Field Service web app, change to the **Settings** area.

2. Go to **Geofencing > Entity Configurations**.

3. Select **Account entity configured for tracking**.

4. Enter the following information:

- **Entity:** Select **Account** because work order locations are inherited from the related service account.
- **Latitude / Longitude:** Choose the latitude and longitude fields on the account entity that holds the geo coded location; this setting will determine the center of the geofence.
- **Enabled As:** Select **Geofence** because the account serves as a static location that a geofence will surround.
- **Default Radius:** Enter a number to represent the radius of the geofence around the latitude and longitude of the account location. The unit of measure will be the unit chosen in the geofence settings in the previous step.

5. Save your changes and select the **Bookable resource entity configured for tracking**.

6. Enter the following information:

- **Entity:** Select **Bookable Resource** to compare the location of field technicians relative to the service account of the work order.
- **Latitude / Longitude:** Choose the latitude and longitude fields on the bookable resource entity that hold the most recent coordinates of the location.
- **Timestamp Field Name:** Choose the location time stamp. This time stamp represents the date and time when the geofence location was updated. Geofence status will be updated only if the status is different than the current status and the time stamp is more recent than the time stamp associated with the current geofence status.
- **Enabled As:** Select **Geo tracked** because the bookable resource has a variable location that is compared against defined geofences.

## Understand what happens when booking a work order

Booking a work order now triggers an asynchronous workflow that creates a geofence. To view the geofences that the system created, go to **Field Service > Settings > Geofences**.

Name	Created On	Last Modified On
Geofence around 'HQ San Francisco' tracking 'Abraham McCormick'	1/7/2021 12:13 PM	
Geofence around 'Wingtip Toys Northwest' tracking 'Abraham McCormick'	1/7/2021 11:44 AM	
Geofence around 'Adventure Works SF' tracking 'Abraham McCormick'	12/7/2020 9:29 PM	
Geofence around 'Wingtip Toys Northwest' tracking 'Abraham McCormick'	12/7/2020 8:36 PM	
Geofence around 'Fabrikam, Inc. Southeast' tracking 'Abraham McCormick'	12/7/2020 2:50 PM	
Geofence around 'Adventure Works' tracking 'Abraham McCormick'	10/30/2020 1:30 PM	
Geofence around 'Woodgrove Bank Northwest' tracking 'Abraham McCormick'	10/19/2020 3:07 PM	
Geofence around 'Fabrikam, Inc. Southeast' tracking 'Abraham McCormick'	10/19/2020 3:07 PM	
Geofence around 'Safeway-Juanita #2734' tracking 'Simon Raley'	10/14/2020 12:27 PM	
Geofence around 'Fabrikam, Inc. Northwest' tracking 'Matthew Everson'	10/14/2020 12:27 PM	
Geofence around 'Adventure Works Engineering' tracking 'Brady Hannon'	10/14/2020 12:27 PM	

Before traveling to the work order location, the technician is outside the geofence and the system creates an *exit geofence* event. When a technician arrives at the location and opens the Field Service mobile app, an *enter geofence* event is created.

Entering a geofence also changes the related geofence **Geo tracked record status** from **Outside** to **Inside**.

When the technician leaves the geofence, another "exit" event will be created.

### 💡 Tip

For testing purposes, if you can't physically travel to a location, expand the geofence radius to include your current location.

## Manage geofence trigger filters

Geofence trigger filters define when a geofence event will trigger, relative to time values of the booking.

When geofencing is enabled, the system creates geofences for all bookings, which can result in performance issues if there are many bookings. Geofence trigger filters allow you to define a time window within which the geofence will be created and events can be triggered. Along with performance improvements, these filters can help avoid false-positive geofence events. By filtering upcoming service appointments, you can avoid a scenario where a technician inadvertently travels through a geofence that isn't currently their active engagement.

When trigger filters are enabled, you can set time-based filters. Filtered fields include:

- **Start Time**
- **End Time**
- **Actual Arrival Time**
- **Created On**
- **Estimated Arrival Time**
- **Modified On**
- **Offline Time Stamp**
- **Record Created On**

You can then set a value in days before or after the related date for the filter.

For example, it could enable trigger filters based on start time with last/next days value of one. The system now only creates a geofence and triggers events for bookings that start between yesterday and tomorrow.

---

## Feedback

Was this page helpful?

 Yes

 No

Provide product feedback 

# Manage the Field Service mobile app with Intune

Article • 08/28/2024

Mobile application management enables administrators to apply and enforce policies on mobile apps. One mobile application management option is [Microsoft Intune](#). It offers a suite of features that lets you publish, push, configure, secure, monitor, and update mobile apps - including the Dynamics 365 Field Service mobile app.

Mobile application management is important to field service organizations whose technicians use the mobile apps because they frequently travel to multiple locations, and protecting sensitive company data is critical. Many organizations have a bring-your-own-device policy, which means the Field Service mobile app needs management among many different kinds of devices and apps for personal use.

With an Intune-enabled Field Service mobile app, IT administrators can:

- Add and assign the mobile app to user groups and devices, including users in specific groups, devices in specific groups, and more.
- See reports and track app usage.
- Limit sharing of corporate data among apps by restricting data leakage through cut, copy, paste, and save-as.
- Provide encryption at rest.

## Get started

Intune is a separate Microsoft service that isn't included with Field Service. Refer to the documentation on [What is Microsoft Intune app management?](#) and [Adding and assigning an app with Intune](#) to get started.

A configuration can be set up through the [Device Management portal](#). Each supported platform (iOS, Android, and Windows) requires a separate configuration.

Specific configurations like prefill of URL or username aren't available for the [Field Service mobile app](#).

---

## Feedback

Was this page helpful?

 Yes

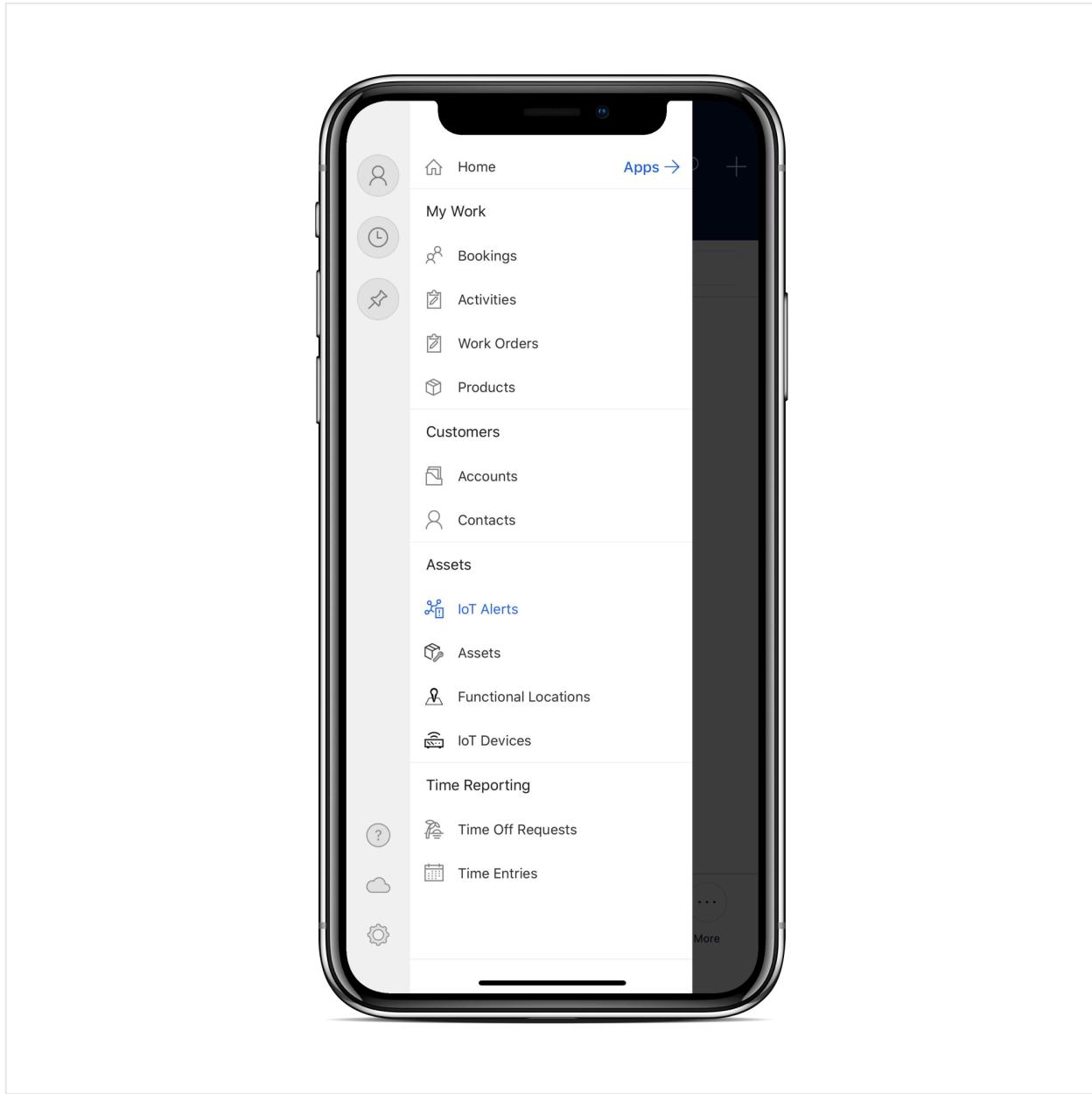
 No

Provide product feedback 

# Work with IoT data on the mobile app

Article • 08/28/2024

[Connected Field Service](#) is the IoT layer in Dynamics 365 Field Service. It enables organizations to create work orders based on real-time information from connected devices. The integration of IoT data provides technicians with information and tools for efficient onsite service delivery.



Technicians can use Connected Field Service to:

- [View IoT data](#) to get more information and details about the context of a repair.
- [Register new IoT devices](#) when installing an asset onsite.
- [Send commands](#) to an IoT device from anywhere to troubleshoot issues.

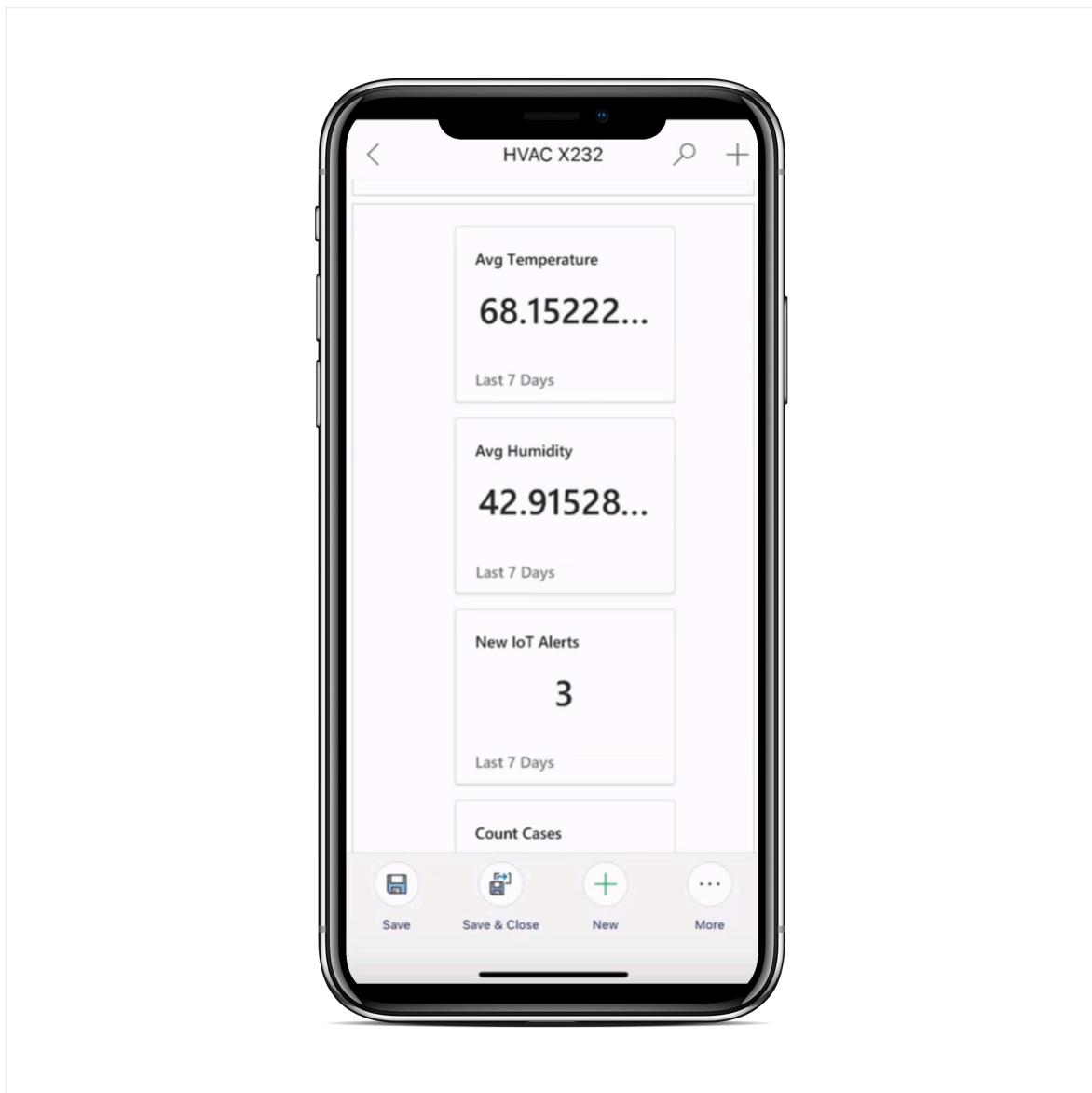
# Prerequisites

- An administrator [deployed and configured](#) the required services for Connected Field Service.
- You [updated to the latest version](#) of the Dynamics 365 Field Service mobile app.
- You have an active internet connection.

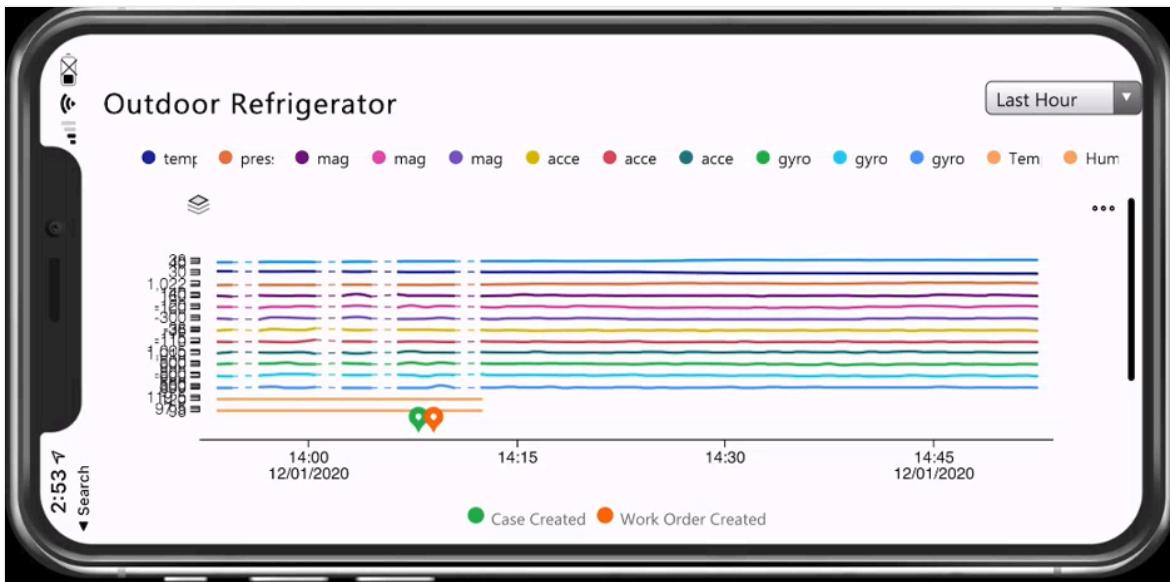
## View summary tiles and device readings

While performing service on a customer asset, you can check recent IoT data for devices related to that asset.

1. Open the customer asset and go the **Summary** tab. Summary tiles show an overview of recent IoT activity related to the asset.



2. Go to the **Device Readings** tab to see the most recent IoT measurements plotted on a graph.



### ⓘ Note

Summary tiles and device readings are only visible after an [asset is related to a connected device](#). Otherwise, this information shows on the IoT device or IoT alert.

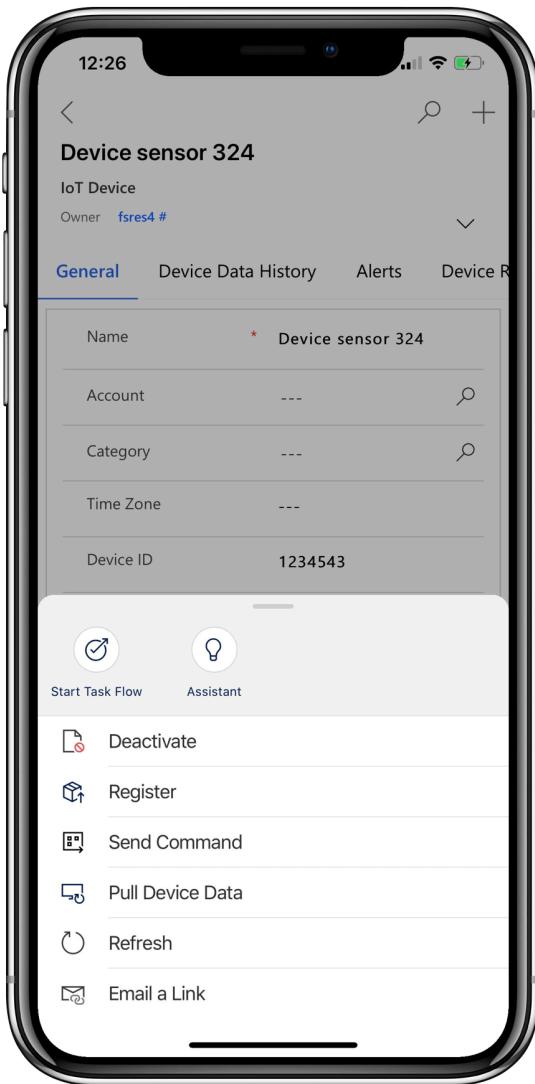
## Register new IoT devices

During asset installations, you can connect new IoT devices to customer assets. But first, register the new IoT device with the system.

1. In the mobile app, go to **Customer Assets** and tap the **Add** button.
2. Fill in the asset information and, then tap **Register Device**.

## Troubleshoot devices by sending commands

After an administrator has [configured commands for Connected Field Service](#), you can run them from mobile app.



Common commands include restart and shutdown and other custom commands are device-specific.

To send a comment, open the IoT device record and go to **More ... > Send Command**.

## Next steps

- Use the mobile app to complete work orders

## Feedback

Was this page helpful?

Yes

No

Provide product feedback ↗

# Download the mobile app

Article • 08/28/2024

The Dynamics 365 Field Service mobile app works on iOS and Android devices and on Windows laptops and tablets. It gives technicians the tools they need to serve customers onsite.

Sample screens show both the classic user experience ("Unified Interface UX") and the new mobile app user experience in separate tabs.

## Prerequisites

A system administrator has [set up the mobile app](#), user profiles, and security roles.

## Download the app

Go to the app store on your iOS, Android, or Windows device and search for **Dynamics 365 Field Service**.

- Android app: [Dynamics 365 Field Service on Google Play](#)
- iOS app: [Dynamics 365 Field Service in the Apple App Store](#)
- Windows app: [Dynamics 365 Field Service in the Microsoft Store](#)

System requirements for the Field Service mobile app are the same as for the Power Apps mobile app. See [Supported platforms for running apps using the Power Apps mobile app](#).

## Supported mobile devices

To provide the best experience for mobile app users, we recommend using modern devices with high [CPU Benchmark scores on Geekbench](#).

The required storage size depends on the [mobile offline profile](#). It specifies the amount of data that your organization needs to download for when there's no internet access.

### iOS

[[ ]] [Expand table](#)

Requirement	OS Version	CPU Benchmark Score	Storage
Recommended	Latest version	1,000+	64+ GB
Minimum	Previous version	400+	64 GB

[Get the iOS app.](#) ↗

## Android

[Expand table](#)

Requirement	OS Version	CPU Benchmark Score	RAM	Storage
Recommended	Latest version	900+	8 GB	64+ GB
Minimum	Previous three versions	400+	4 GB	64 GB

[Get the Android app.](#) ↗

## Windows

[Expand table](#)

Requirement	OS Version	RAM	Storage
Recommended	Latest version	8 GB	128 GB
Minimum	Windows 10 version 17763.0	6 GB	64 GB

[Get the Windows app.](#) ↗

An administrator can also download the package from the [app center](#) ↗ and [distribute it to users using Microsoft Intune](#).

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback](#) ↗

# Work with the mobile app (Unified Interface)

Article • 11/12/2024

The Dynamics 365 Field Service mobile app helps frontline workers complete work orders efficiently and effectively. They can view jobs in a daily overview, dive into detailed instructions, and update work orders on the go. The Field Service mobile app uses the Power Apps mobile app as a player for the model-driven Field Service mobile app module. Therefore, core concepts like navigation, views, and actions are explained here: [Use model-driven apps in the Power Apps mobile app](#).

This article discusses concepts that are specific to the Field Service mobile app and its common scenarios.

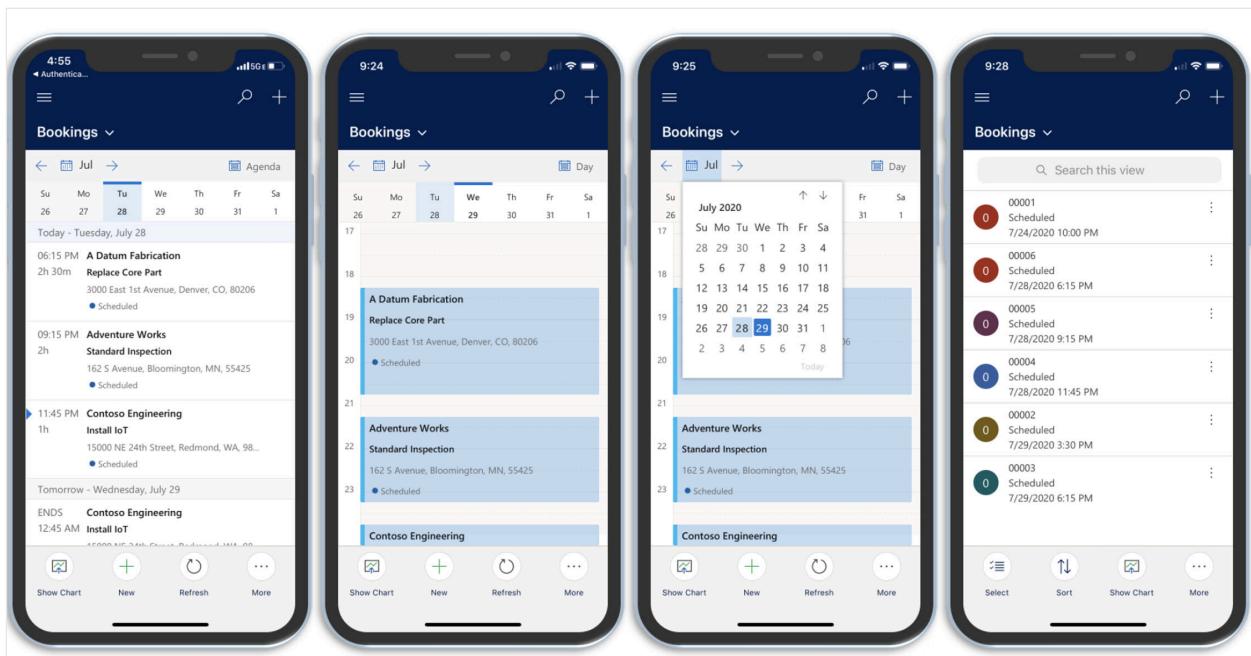
## Sign in

An admin has to [ensure access and assign permissions to users](#).

After [installing and opening the mobile app](#), users can sign in. If users have access to more than one app, they have to choose which app to load. The app might download [data from the offline profile](#) to the device, which can take some time to complete.

## View scheduled work orders

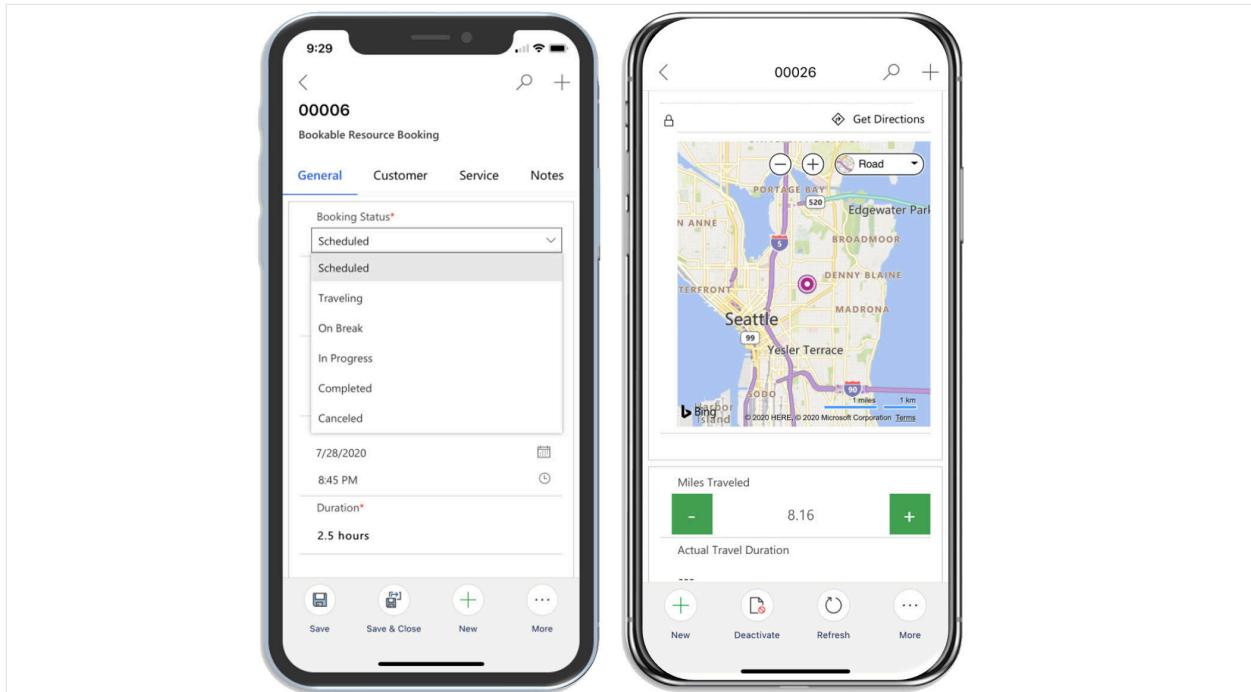
The first screen shows a calendar view of the currently scheduled work orders. Users can use the date picker to switch between days and change the view of the home page. To show bookings as a list, select **More > Show as > Read-only Grid**.



Frontline workers can [view their daily bookings on a map](#).

## Travel to a job location

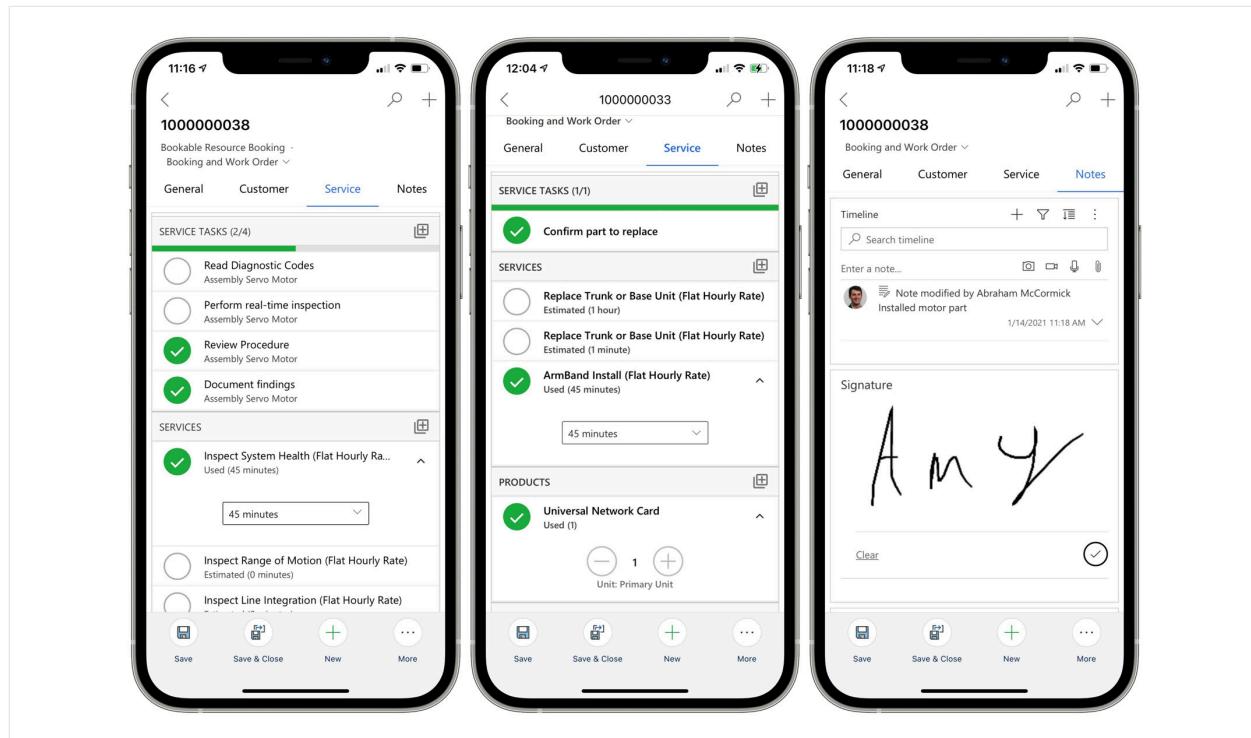
Select a booking to see more details about the job, such as booking time, planned duration, or the related work order. Frontline workers can change the status of a booking when they're driving to the job location. The **Customer** tab shows the work order location and lets users get turn-by-turn directions.



For more complex locations, Field Service supports [functional locations](#) that let you [structure locations](#). Watch this video to learn more about functional locations in the Field Service mobile app:

## Do and record your work

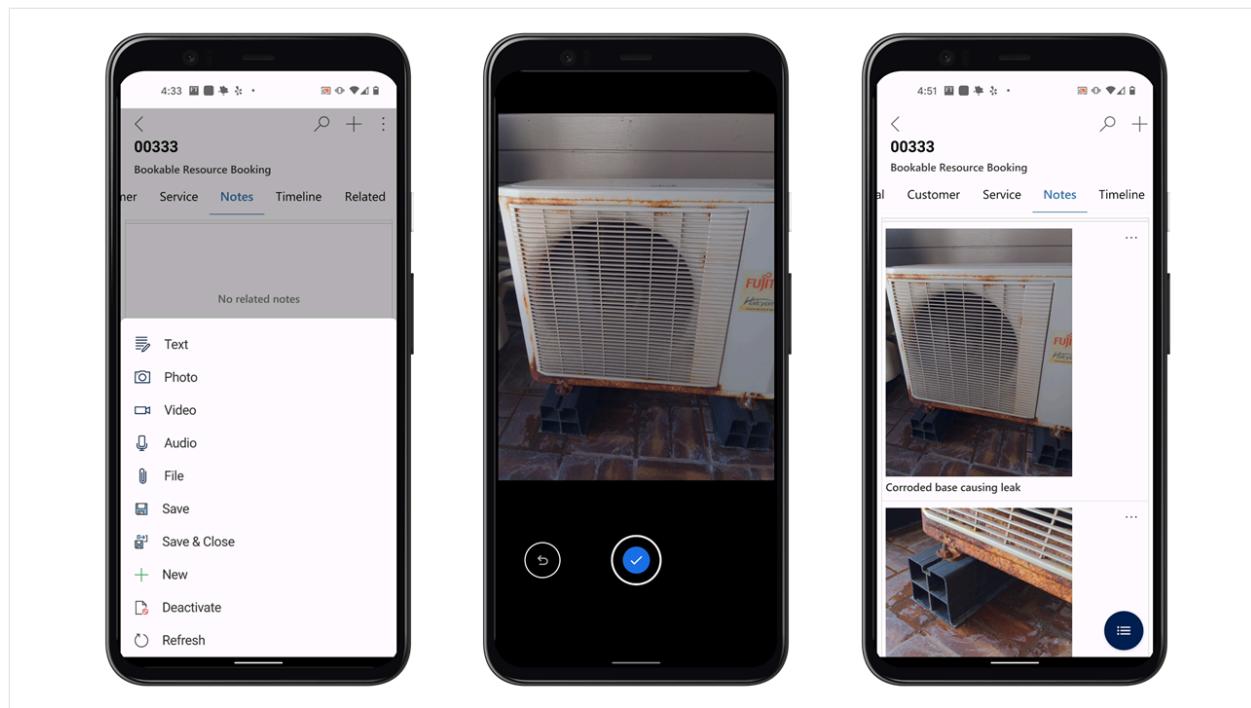
The **Service** tab contains work order details like service tasks, products, and services. Users can mark a service or service task as complete and include products that were used in the process to make sure the invoicing is accurate. They can adjust the product units and the service hours as needed. To see more details, select a service task, service, or product name.



## Add notes and attachments

On the **Notes** tab, frontline workers can add text, image, audio, and video notes and link them to the booking. These notes help document and build a work history. Images added to notes [use image optimization](#) to save storage space.

The **Timeline** tab shows you other historical data related to the booking.

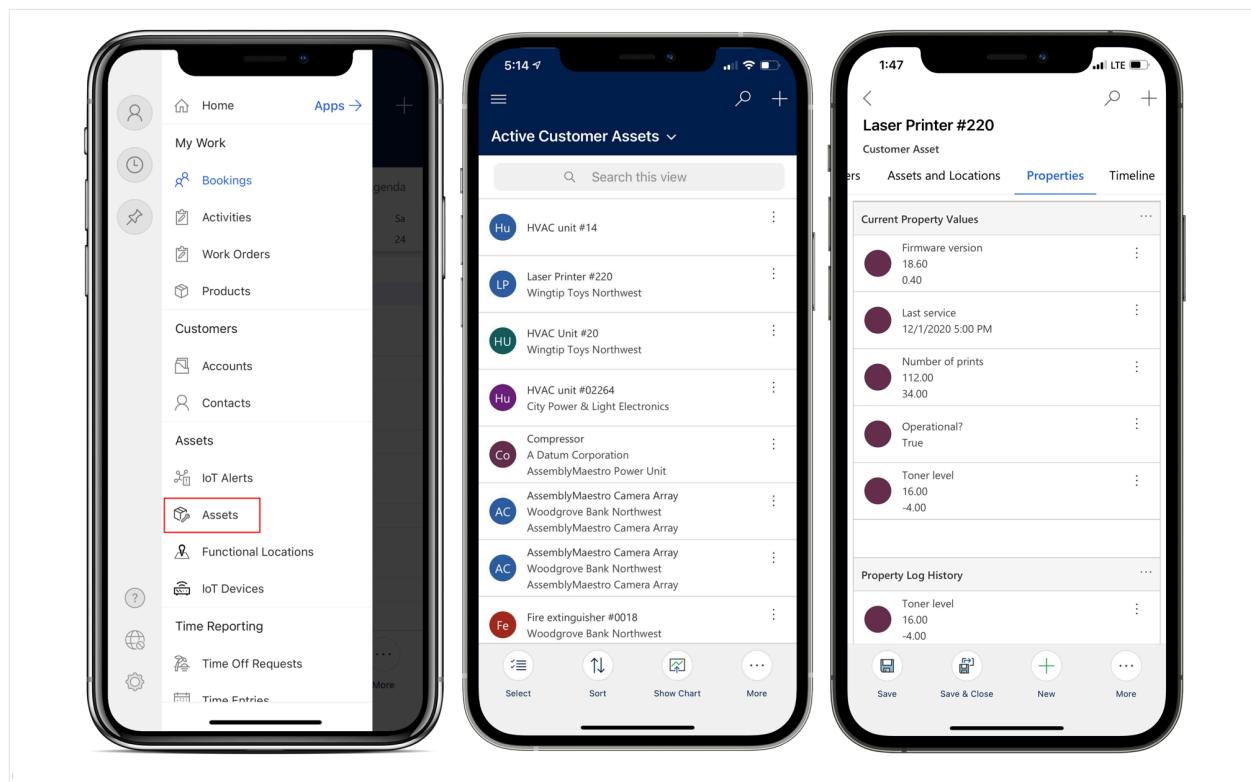


Notes are available only when they're included with the Bookable Resource Booking form. You can't use notes with other forms.

To save notes, users need a [security role with access](#) to the `msdyn_bookableresourcebookingquicknotes` table.

## Manage customer assets

When the mobile device has internet connection, users can view and interact with functional locations and customer asset hierarchies.

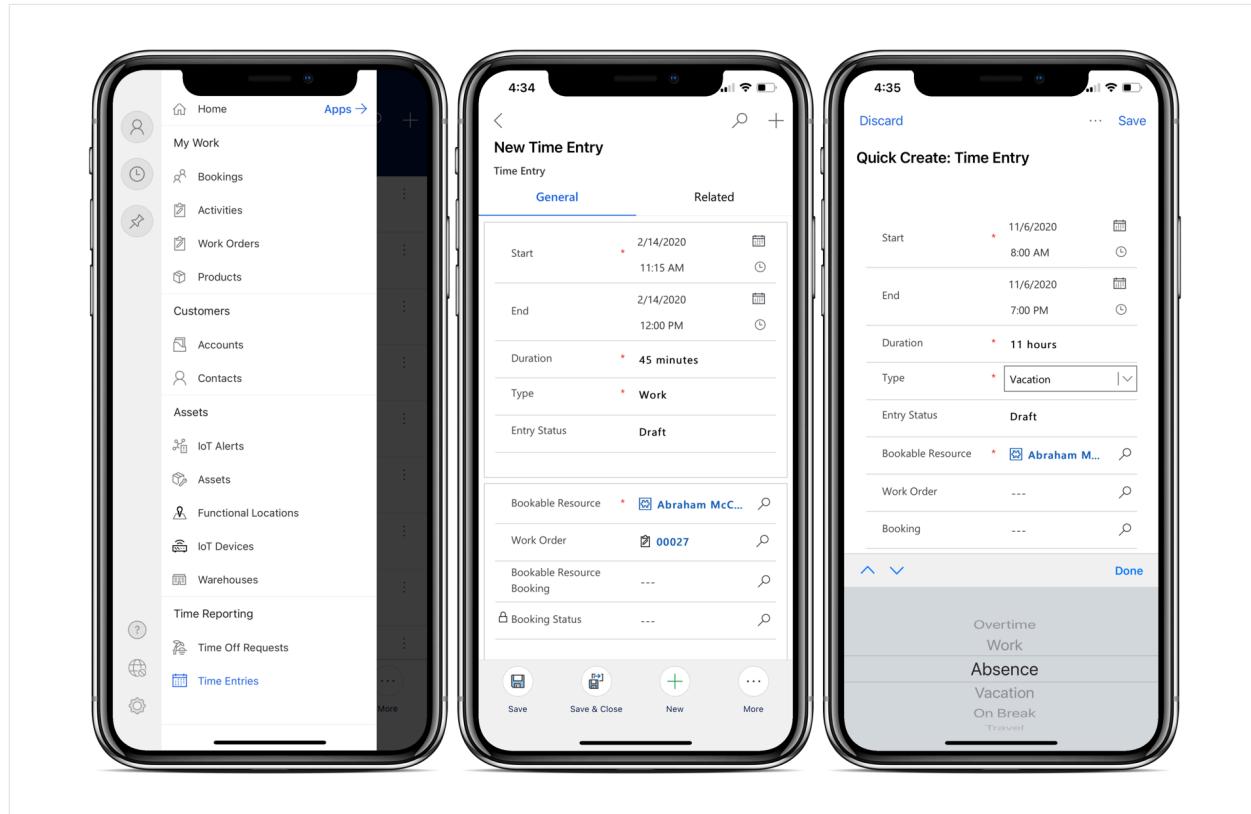


Sometimes, it's handy to scan a barcode to find records that have a matching barcode field, especially in the context of assets (for example, when installing a new device and making sure the serial number gets captured in the system). An administrator can [set up barcode scanning](#) and add it to the relevant forms.

## Track time

Users can track the time that they spend on work orders, on break, traveling, and other scenarios with time entries. The mobile app allows them to create time entries quickly.

From the main menu, go to **Time Entry** to create them.



Watch this video to learn more about time entry in the Field Service mobile app:

<https://www.microsoft.com/en-us/videoplayer/embed/RE4J6mQ?postJsIIMsg=true>

## Create follow-up work orders

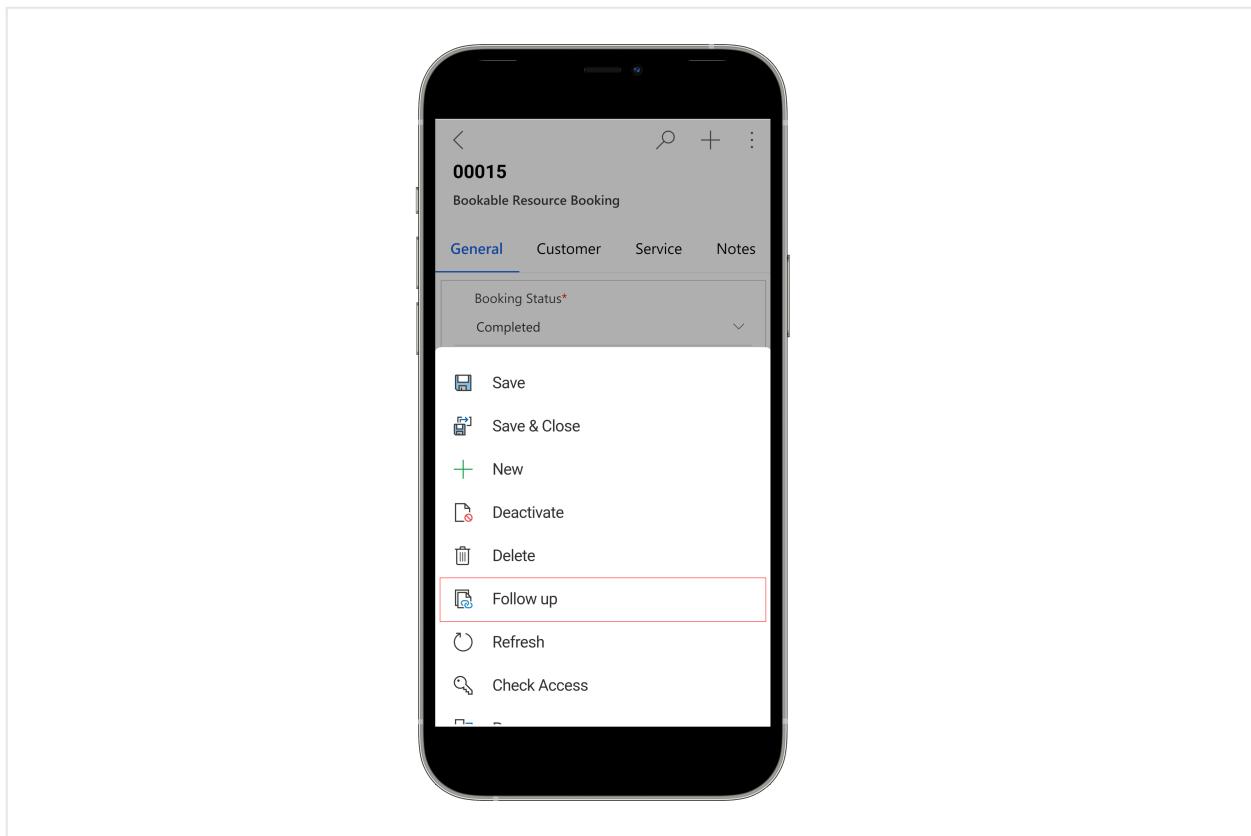
To schedule more work for another time, users can create follow-up work orders. This might come in handy when they are working on a job and notice that something else needs fixing and they are missing the spare part.

To create a follow-up work order, select the **Follow up** option in the bottom app menu. The following fields are already filled in based on the current work order:

- Address
- Billing Account
- Service Account
- Service Territory
- Exchange Rate
- Tax Code
- Taxable
- Transaction Currency ID

After saving the work order, a dispatcher can schedule it.

If users don't see the follow-up option, an administrator needs to assign them [create permissions](#) to the work order table.



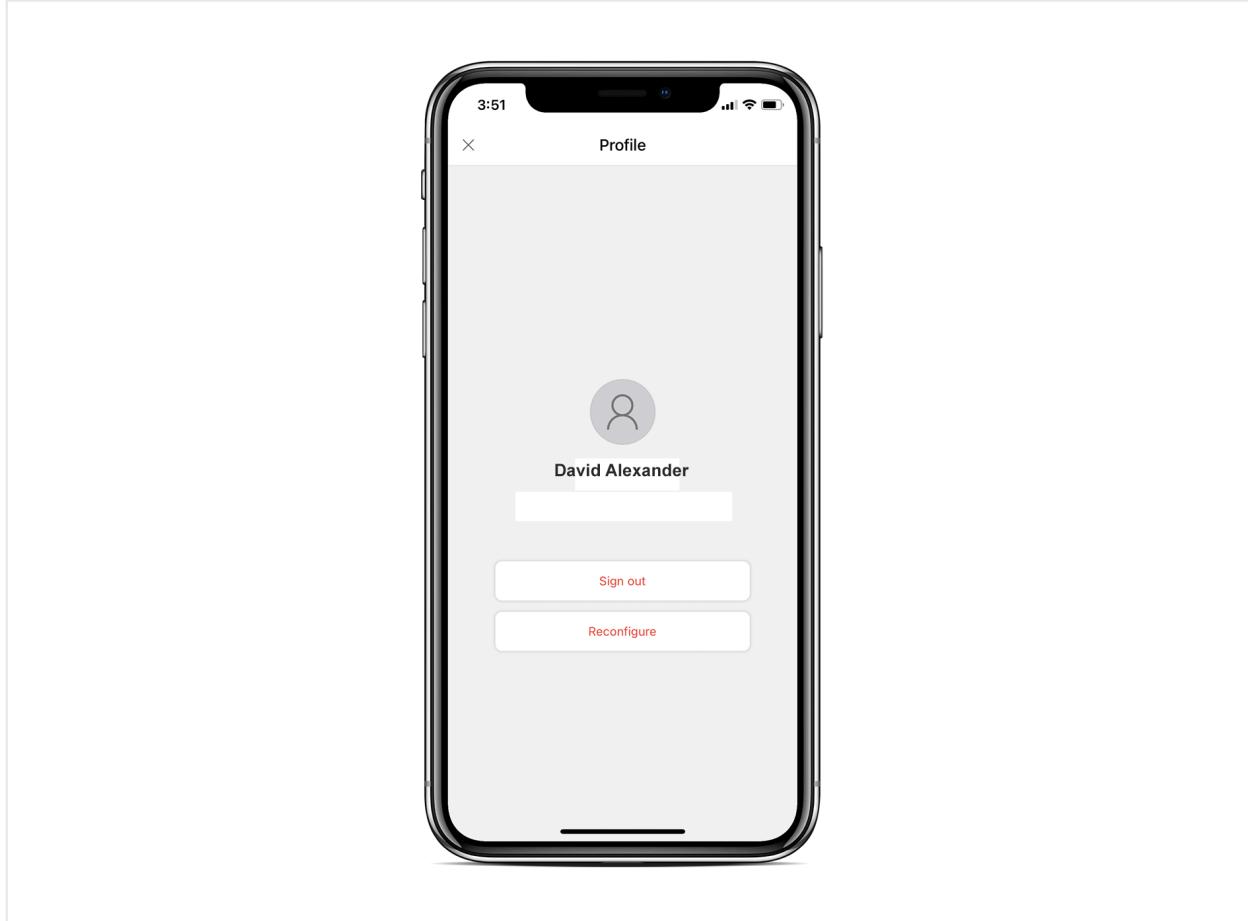
Watch this video to learn more about follow-up work orders in the Field Service mobile app:

<https://www.microsoft.com/en-us/videoplayer/embed/RWyHY4?postJs||Msg=true>

## Troubleshoot app issues

Issues with the Field Service mobile app can be the result of corrupted data. You can often solve them by deleting the app's cached data.

Select your profile icon in the upper-left corner, select **Reconfigure**, and confirm when you're prompted to do so.



---

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

# Work offline and update offline data

Article • 08/28/2024

To work in areas without internet access, the app downloads important information to the mobile device for a seamless experience. When the device connects to the internet, data automatically syncs with the server.

An administrator has to configure the offline profile for the app before technicians can download the data. Downloading the offline data can take some time. You can check the download progress and status in the app while downloads are in progress.

Administrators [define which data is available offline](#) and [how often the app looks for changes on the server](#).

## ⓘ Note

The [new mobile experience](#) doesn't support working offline.

## Next steps

- [Set up the mobile offline profile](#)
- [Configure offline data synchronization](#)

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

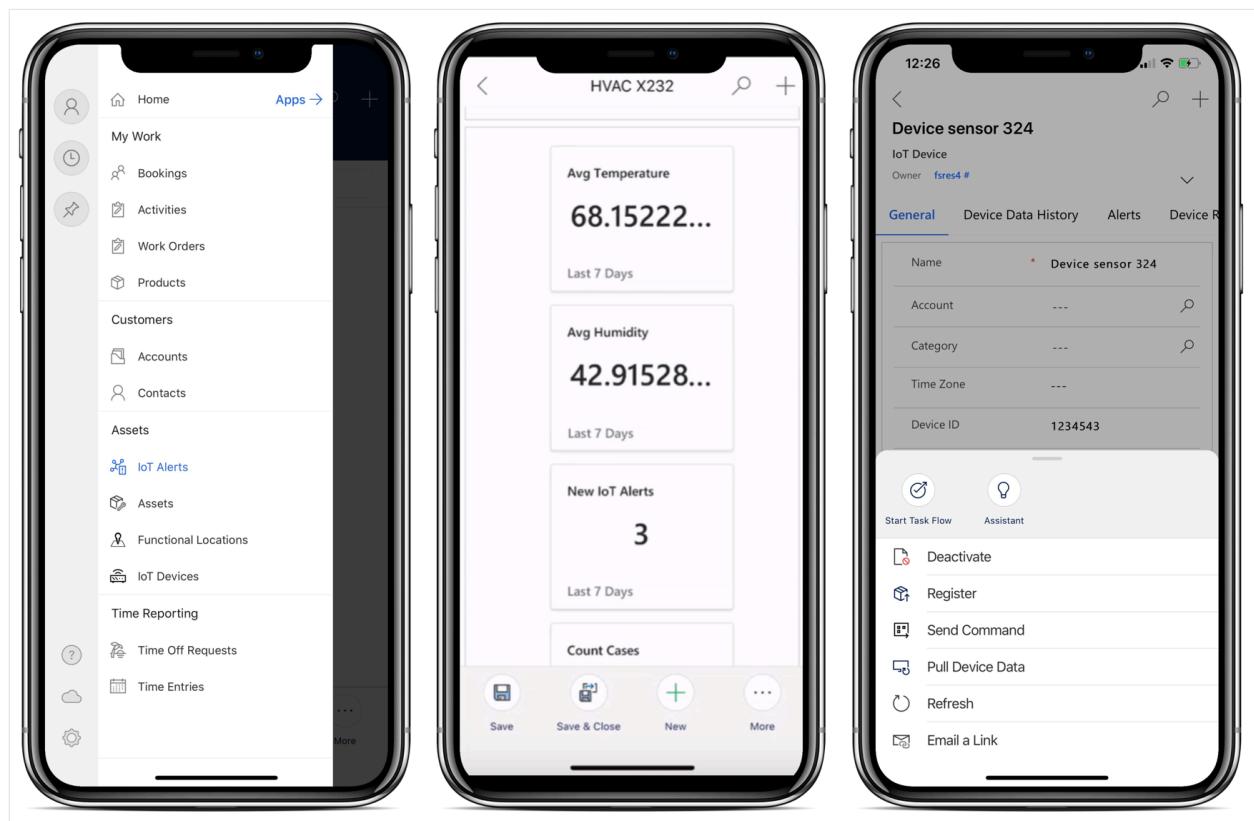
# Access related apps from the mobile app

Article • 08/28/2024

The Dynamics 365 Field Service mobile app provides quick access to IoT data and Dynamics 365 Remote Assist if your organization uses these capabilities. After enabling the new user experience, users can also [access a library of guides based on Dynamics 365 Guides](#).

## IoT data

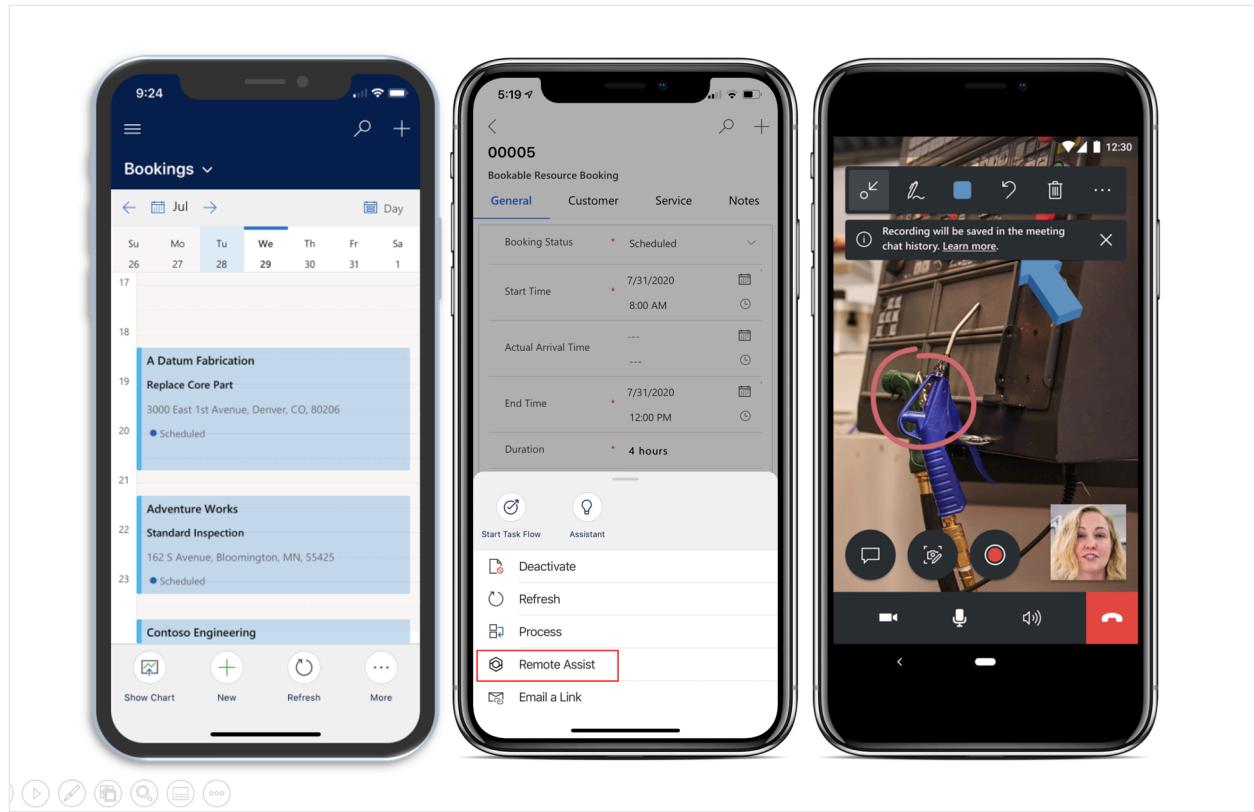
Field Service helps organizations embed IoT devices in their flow of work. Users of the mobile app find a subset of that information readily available. Live charts for IoT data from an IoT device, customer asset, or IoT alert record are available at your fingertips. Technicians can view and interact with IoT data and IoT actions like pulling live device data or registering new devices in the mobile app.



For more information, see [Connected Field Service for the Field Service mobile app](#).

## Launch Dynamics 365 Remote Assist for remote collaboration

Organizations using Dynamics 365 Remote Assist find a link on the work order to open the Remote Assist mobile app.



For more information, see [Using Field Service with Dynamics 365 Remote Assist](#).

## Feedback

Was this page helpful?

Yes

No

[Provide product feedback](#)

# View daily bookings on a map

Article • 08/28/2024

Frontline workers can view their scheduled work orders on a map from the Field Service mobile app. Seeing their work on the map helps frontline workers plan their day and provides an easy way to trigger travel directions or contact the customer. The booking map works when the mobile app is running offline *with* internet access. In this case, the device is connected to the internet while using downloaded data.

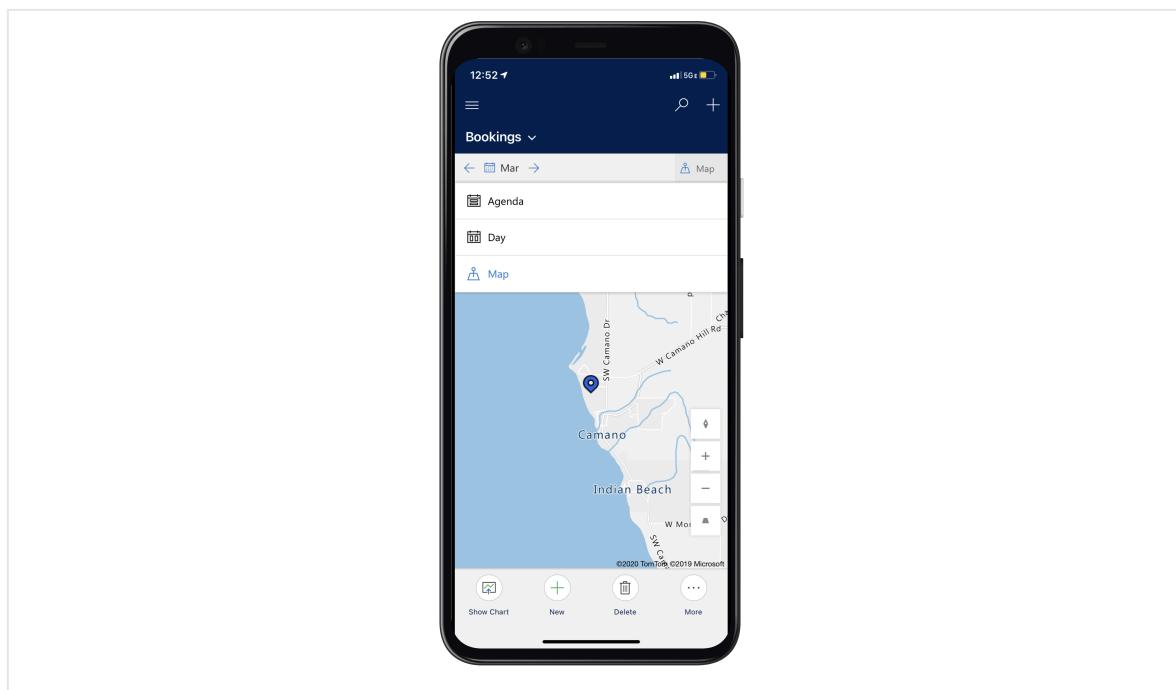
## Prerequisites

To use booking maps, [enable booking maps for mobile](#) in the **Work Order/Booking section of the Field Service Settings page**.

To see bookings on the map, schedule work orders for a resource. Booking maps show bookings that are related to a work order.

## View booking map on mobile app

1. Sign in to the mobile app and go to **Bookings**.
2. Select **Agenda** in the upper-right of the bookings view, and then choose **Map**.



3. Select a day to see the map of scheduled bookings for the day.

Pin colors represent the Field Service status of the booking status. For more information, see [work order and booking statuses](#).

Tap a booking pin to get directions or call the customer. Select **View Details** to open the booking and work order. The location is the address of the related work order. The phone number belongs to the primary contact for the related work order.

---

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback](#) 

# Create service reports

Article • 12/11/2024

Field Service technicians can create service reports to summarize the work they performed. These reports can contain details such as tasks completed, and products or parts used during the service. Service reports are often delivered to the customer as a PDF file.

The service report is available in the mobile app and web app. The technician can capture a signature on the report and then save it to the timeline. The technician can use their mobile device to send the report. You can set up automated workflows using Power Automate to manage the distribution of reports after they're generated and saved.

## Enable technicians to create service reports

As an admin, use the Power Apps component framework to build a service report for the Field Service mobile application. We provide a sample report and Power Apps component framework control that helps makers design and import reports for their environment. This report is considered a custom control and Microsoft doesn't provide support for it.

For a guided walkthrough, check out the following video.

<https://www.microsoft.com/en-us/videoplayer/embed/RWyFjo?postJslIMsg=true>

## Import the reporting solution

1. Download the [reporting solution](#).
2. [Import the reporting solution](#) into your environment. The import installs a reporting form, a command for the command bar, and includes a sample report. We recommend importing the solution as a managed solution.
3. Find the **Field Service Mobile** app module in your list of Dynamics 365 apps and select the ellipsis (...) > **Open in App Designer**.
4. In the navigation, select the **Bookings form**.
5. On the right side pane, select the ellipsis (...) for the **Reporting** form and select **Add**.
6. Select **Save & Publish**.

## Create your custom report

1. Download the sample [reporting Power Apps component framework control](#) (PCF) source code.
2. Edit the sample reporting Power Apps component framework control. Modify this control to change layout, add branding, updated data, or other updates necessary to meet your reporting requirements.
3. Rename the report to something descriptive for your organization by updating the report name in `ControlManifest` and `index.ts`. For more information, go to the `ReadMe.pdf` included with the sample source code.

### Note

The Power Apps Component Framework Report control includes resource files for multiple languages but only declares English (1033). For other languages, update the `ControlManifest` to declare the desired language for localization.

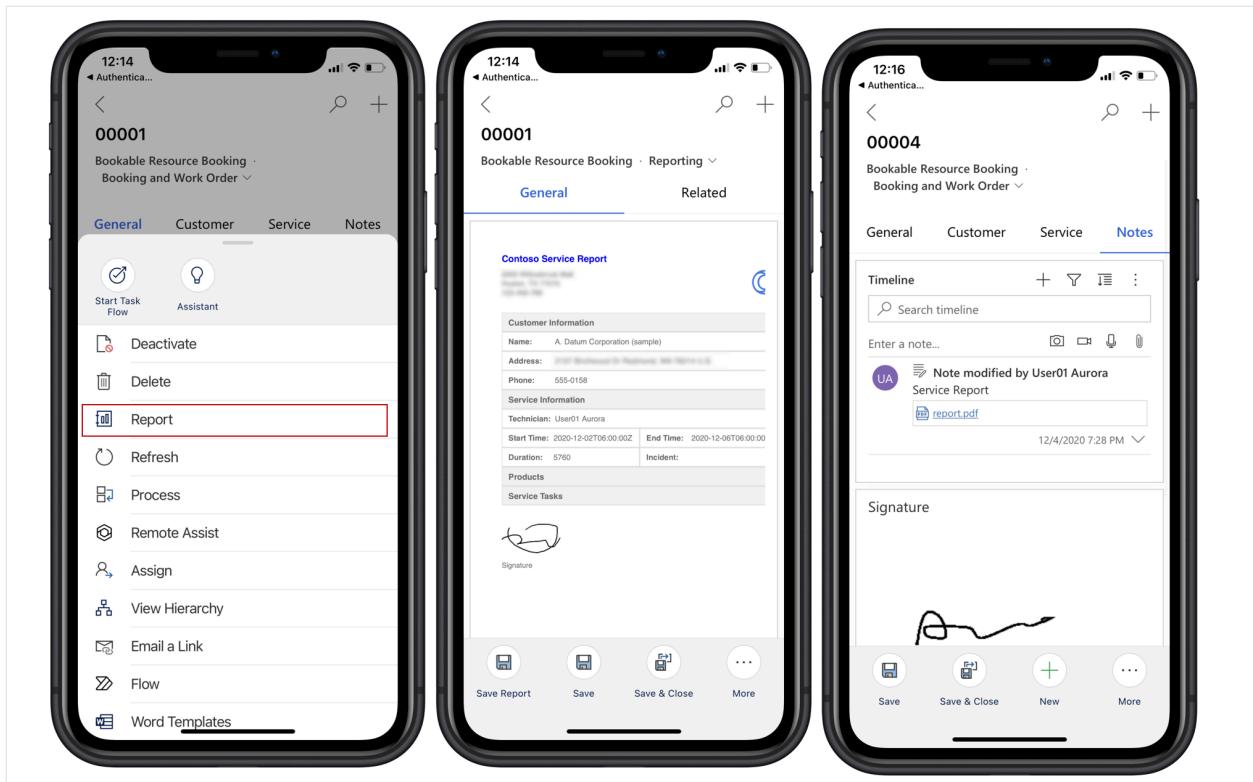
4. Import the modified Power Apps component framework control into your environment. For more information, see [Steps to import a PCF control](#).
5. Update customizations to point to your new Power Apps component framework template. Edit the `ReportView` form for the `Bookable Resource Booking` table to enable the report.

### Note

The report is available offline provided the data you pull for the report is available to the report in your offline profile. If the report is pulling data from the typical work order, the offline profile is already set up. If you're pulling other entities, make sure that they are included in your offline profile so they can be downloaded to the device and available for the report.

## Generate reports in the mobile app

1. Open a booking in the Field Service mobile app.
2. Go to **More > Report**.
3. Capture a signature if necessary and select **Confirm**.
4. To save the report, select **More > Save to Timeline**.



## Generate reports in the web app

Administrators and dispatchers can also generate reports when viewing a booking in the Field Service web application.

1. Open a booking in the Field Service web app.
2. In the command bar, select **Report**.
3. To save the report, select **Save to Timeline** in the command bar.

## Feedback

Was this page helpful?

Yes

No

Provide product feedback

# Optimize images for upload

Article • 08/28/2024

Frontline workers often use high-quality cameras on their mobile devices to take photos of assets and customer locations. The resulting images are often large files with a high resolution and uploading them consumes a lot of network bandwidth and storage. Often, high-resolution images aren't necessary and a compressed version does the job.

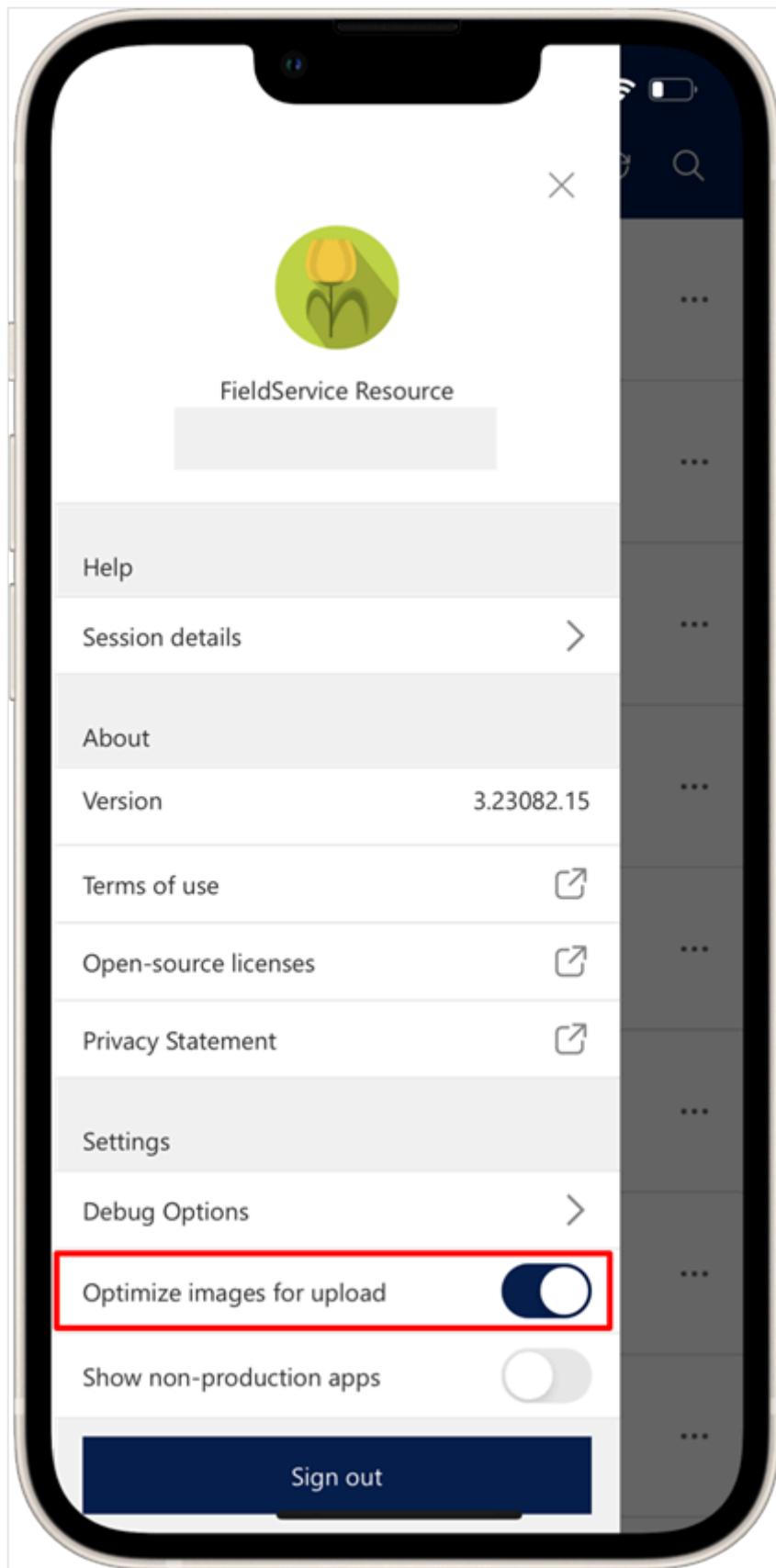
The Dynamics 365 Field Service mobile app on iOS and Android lets technicians turn on image upload optimization to decrease network usage and save on Dataverse storage space. When this option is turned on, the application compresses the image during upload and stores smaller files in Dataverse.

## Note

This feature is not supported on the Field Service app for Windows.

## Turn on optimized image upload

1. Open the Field Service mobile app on your mobile app.
2. Go to the environment selection menu:
  - In the Unified Interface app, open the navigation, select your profile image, and then select **Reconfigure**.
  - In the [new mobile experience](#), select your profile image and choose **Settings**. In the Apps section, select the app module.
3. On the environment selection page, open the navigation .
4. Turn on **Optimize images for upload**.



If enabled, image optimization is applied when uploading images using:

- Timeline
- Quick notes
- Inspection

For custom controls in model-driven apps that deal with images, see [Xrm.Device \(Client API reference\)](#).

---

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

# Get started with the refreshed mobile experience

Article • 10/10/2024

The new user experience in the Dynamics 365 Field Service mobile app helps service technicians swiftly access information they need. It offers mobile-friendly navigation, gestures, and controls to help technicians save valuable time by quickly updating the status of a booking and get driving directions to their work locations.

## Agenda view for the new mobile user experience

The agenda view in the new mobile experience is optimized for frontline workers. It supports quick access to key actions such as updating the booking status, getting directions, or access to Copilot.

Admins can [configure the agenda view to show fields relevant to the organization's business needs](#).

## Agenda view time update

Updating the booking status in the agenda view also updates some time values in the underlying booking record. The following are the values that are updated when the status changes. The list refers to the out-of-the-box status to which all custom statuses are mapped.

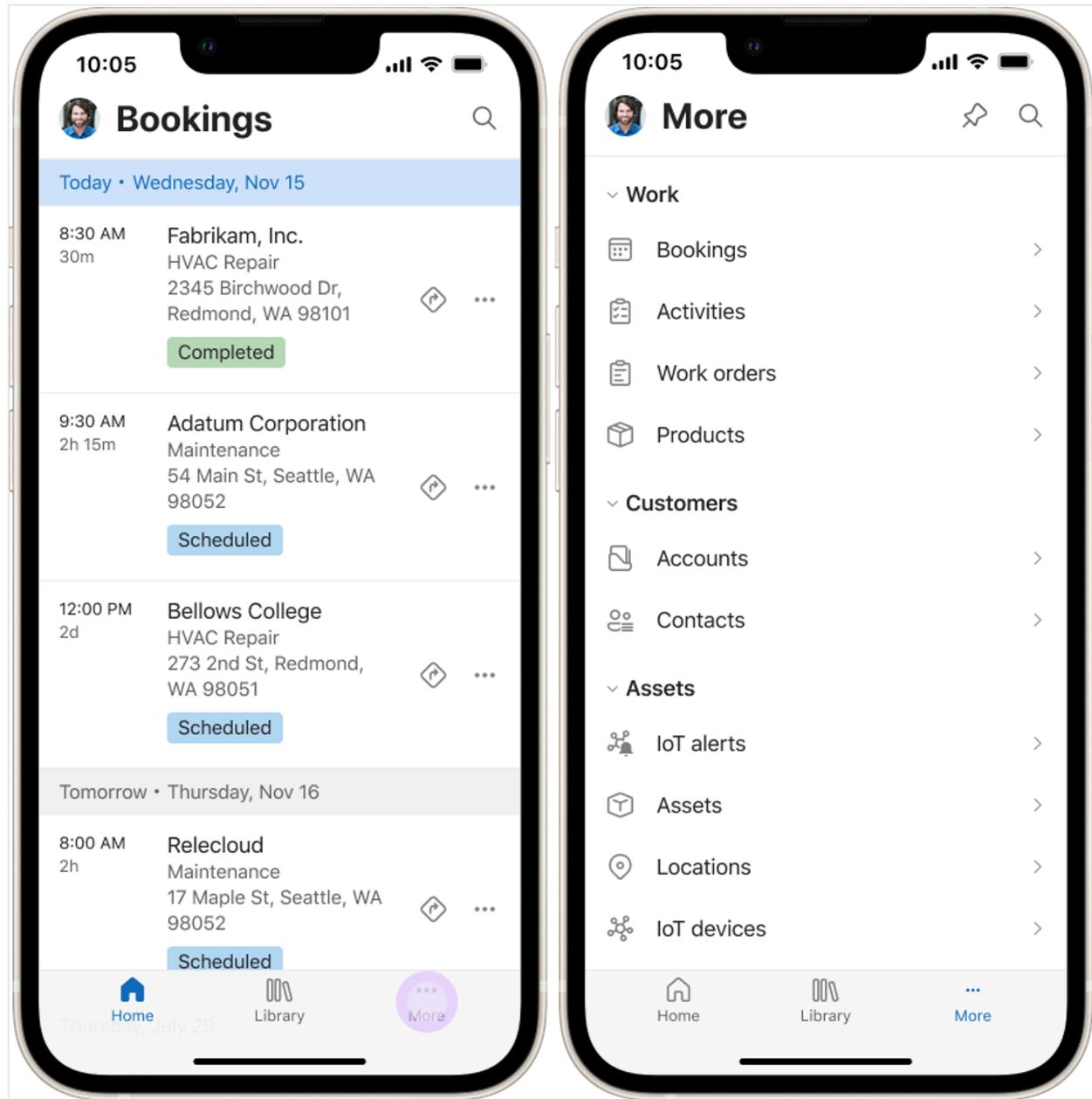
- From *Scheduled* to *Traveling*:
  - Start time is updated to current time
  - End time is updated to current time plus duration
- From *Scheduled* or *Traveling* to *In progress*:
  - End time is updated to current time plus duration
  - If arrival time is empty (the first time the technician has arrived onsite), then arrival time is updated to current time
- From *Completed* to *In progress*:
  - End time is updated to current time plus 1 minute
- From any status to *Completed*:
  - End time is updated to current time

- If a future booking is set to completed (start time is later than the current time), start time is updated to current time minus 1 minute

Updating the status in agenda view doesn't change the *estimated arrival time*.

## Navigate the app

To open the navigation menu, select **More** at the bottom of the screen.



Views are optimized for the mobile app and provide frontline workers with the information they require to find the records they need. More information: [Understand model-driven app views](#)

12:13

. . .



## Work Orders

Search

Sort by

Work Order Number	00752
Priority	Medium
Primary Incident Type	Asset Maintenance
Service Account	Adventure Works Cycles
System Status	Scheduled
Created On	7/23/2024 9:37 AM

Work Order Number	00751
Priority	Medium
Primary Incident Type	Asset Maintenance
Service Account	Adatum Corporation
System Status	Completed
Created On	7/23/2024 9:35 AM

Work Order Number	00750
Priority	Emergency
Primary Incident Type	Asset Maint
Service Account	Adatum Corporation

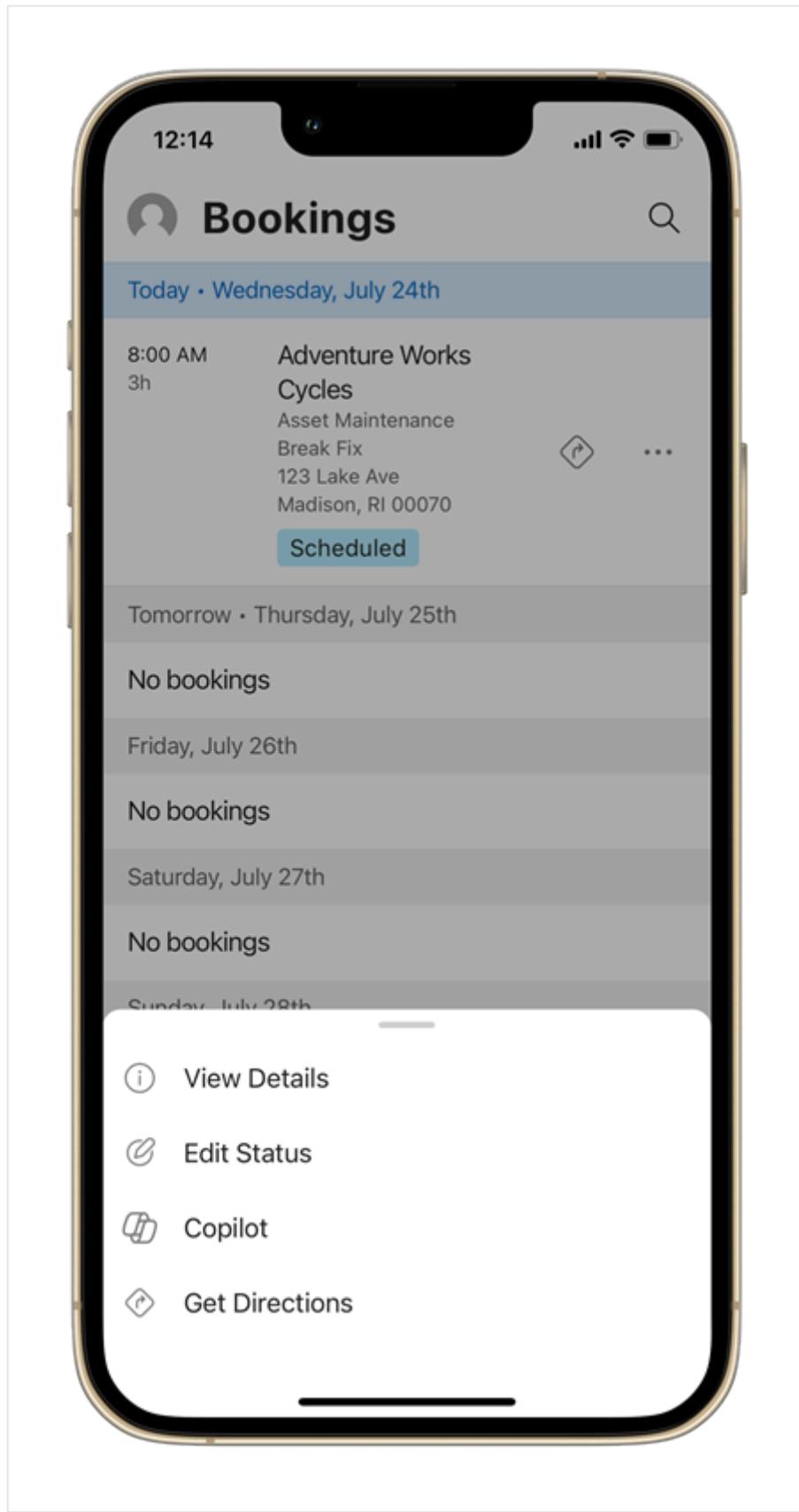
+ Work Order



Sitemap elements that don't link to a view, such as dashboards or custom pages, render in classic Unified Interface.

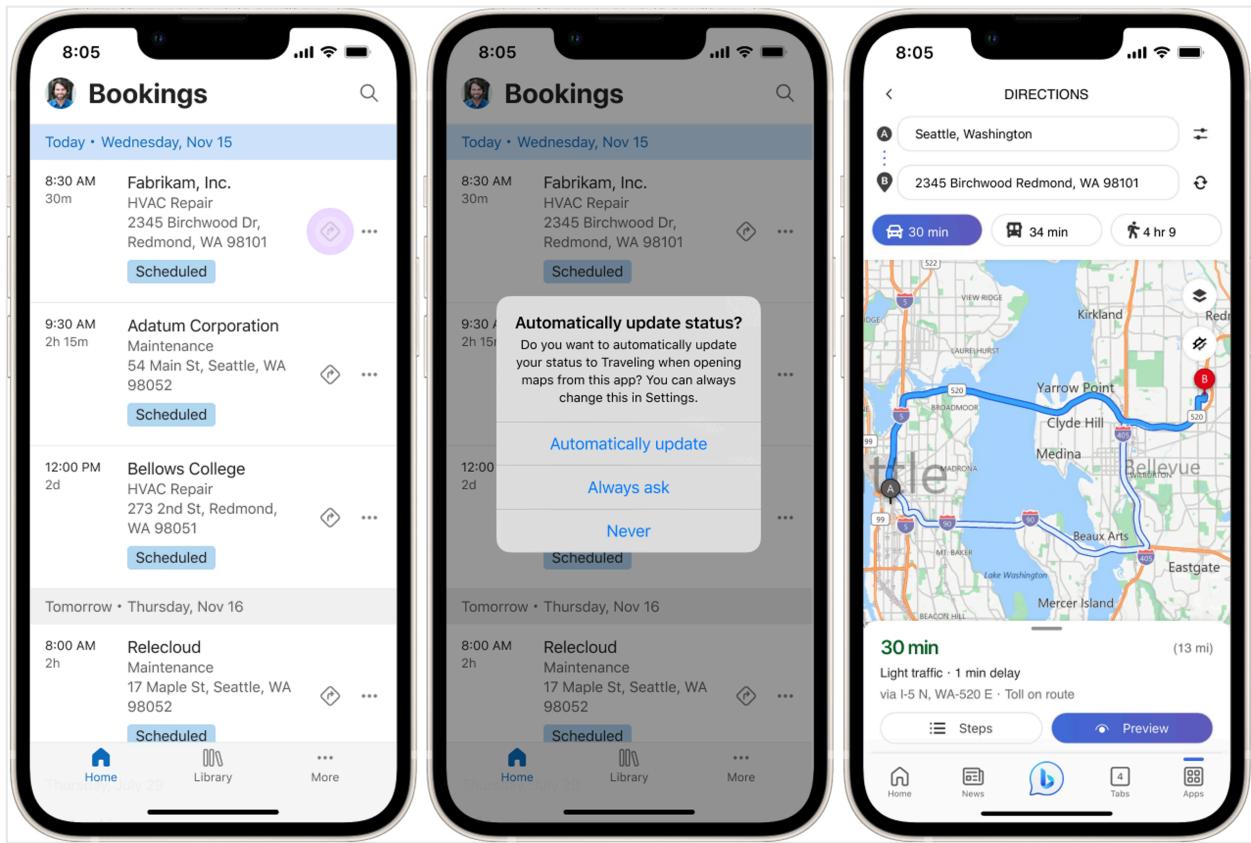
## Work on a booking from agenda view

Swipe a booking from left to right or select the booking's menu to access its quick actions. Open a booking to see the full form and update details in the Unified Interface. Quick actions let you update the booking status and give access to [Copilot features if enabled](#).



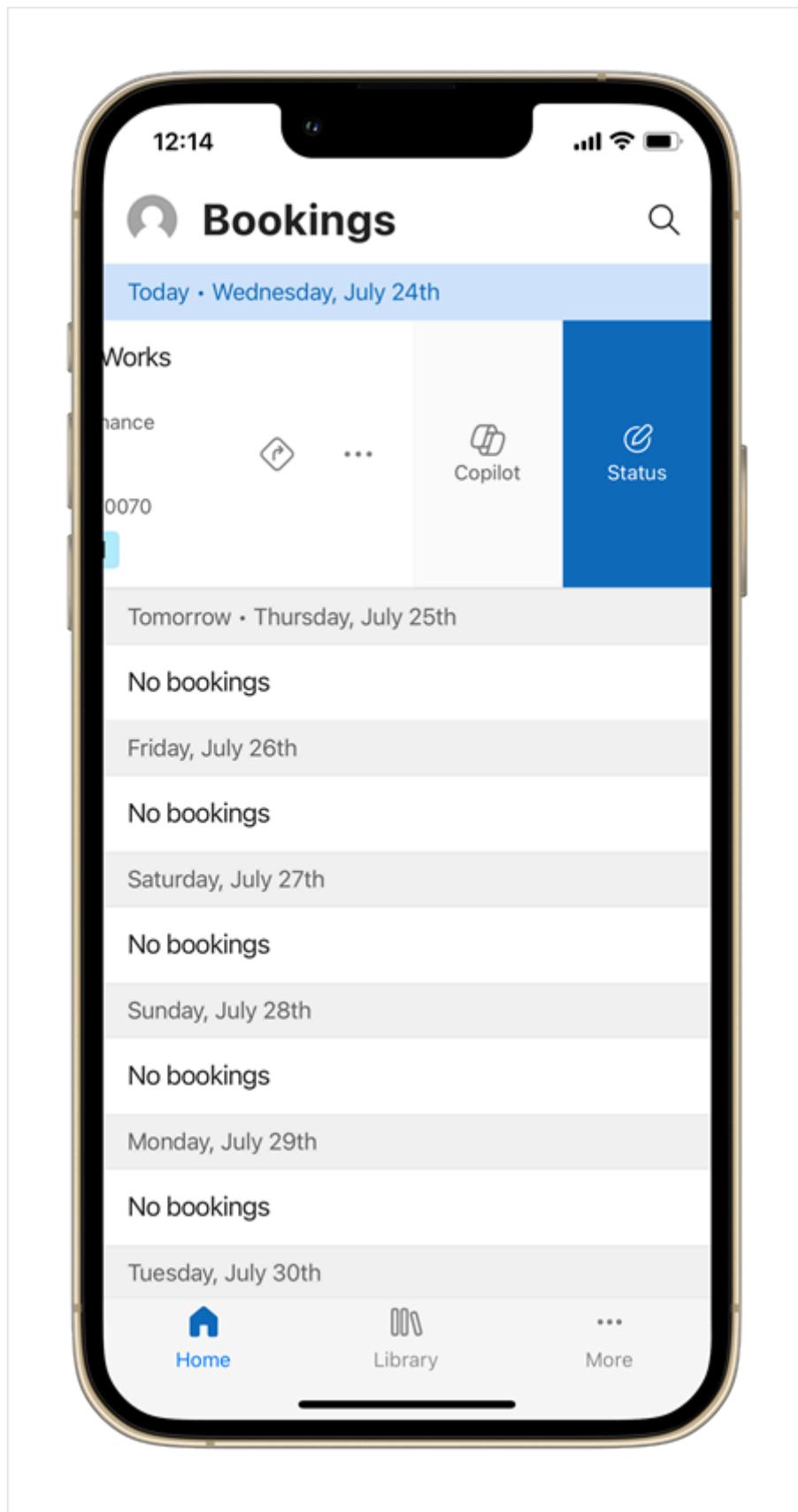
Select the directions icon on a booking tile to open the maps app and get directions. Directions use the coordinates of the address or the address string if no geolocation is available. If no address is specified, the directions icon doesn't appear.

To automatically change the booking status to **Traveling** every time you get directions to a work location, select **Automatically update**. You can change it later in the app settings.



## Work with Copilot

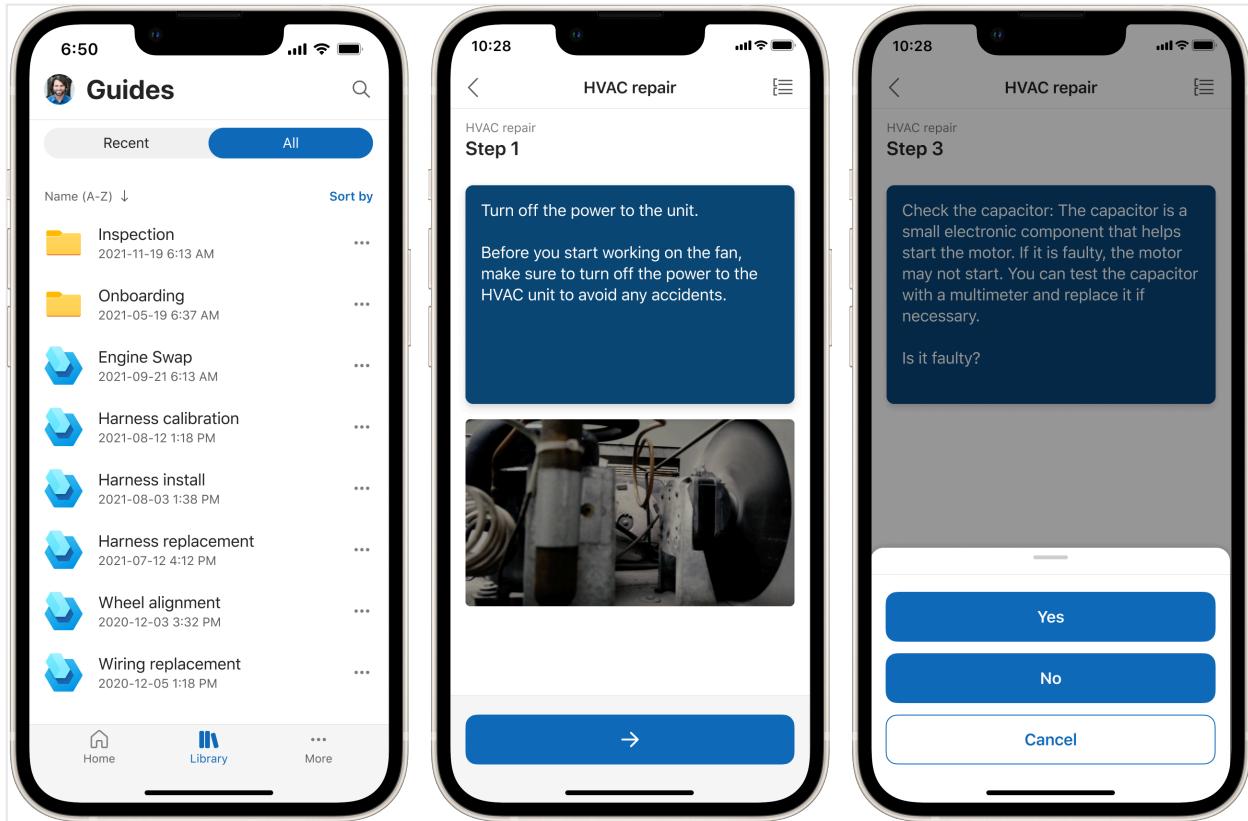
The new mobile UX uses Copilot in Field Service to enable technicians with a quick and easy way of updating work orders and getting a summary of the work order. Swipe a booking to the left to open Copilot.



For more information, see [AI-powered work order update \(preview\)](#) and [Summarize records with Copilot in Field Service \(preview\)](#).

## Use embedded Guides in the mobile app

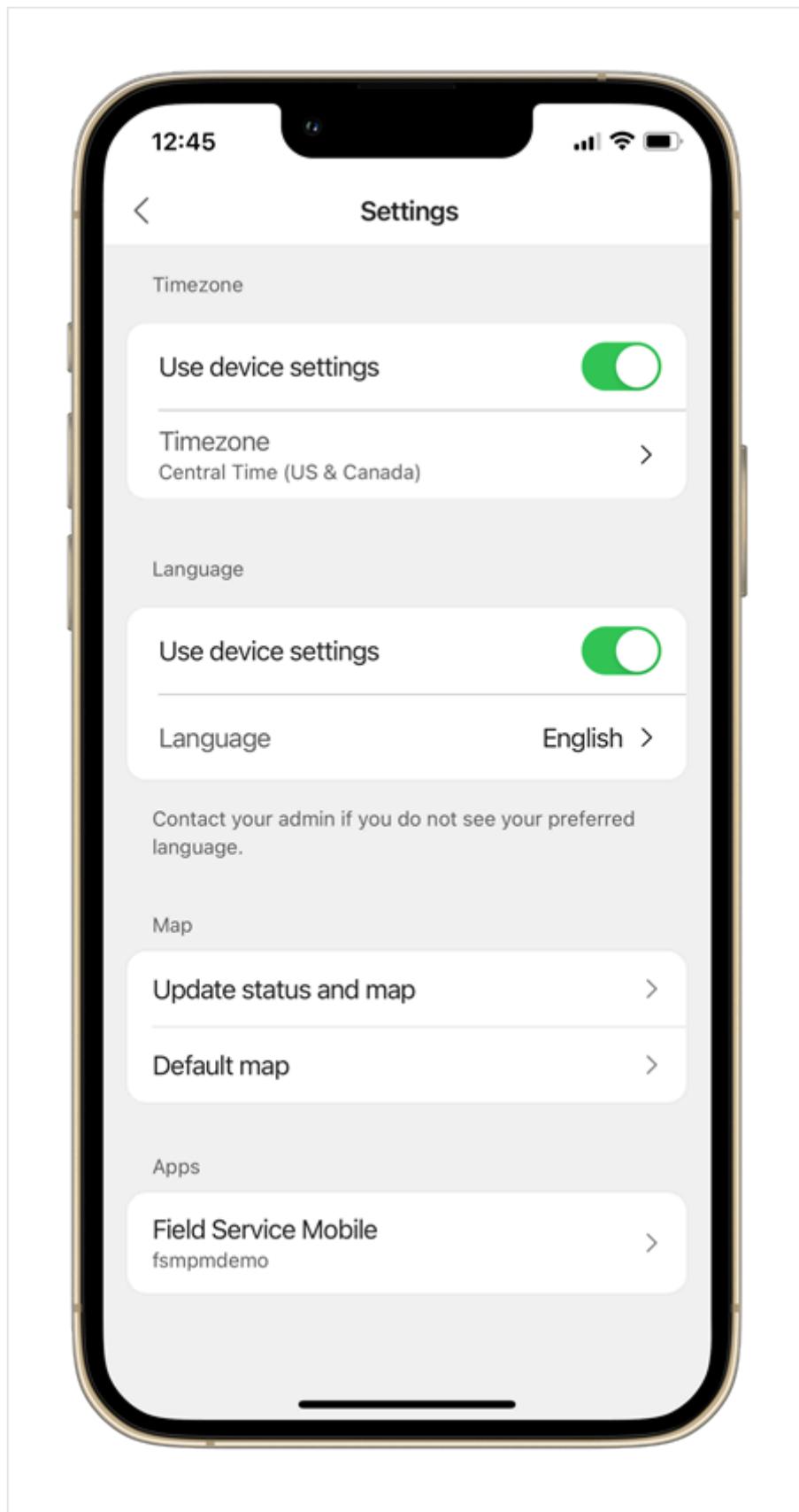
If your organization uses Dynamics 365 Guides, you can [use the new user experience for the Field Service mobile app](#) to access guides from mobile devices. If Guides uses the same environment as Field Service, users find a **Library** option at the bottom of the app. Select it to access your organization's guides library, search for specific guides, and follow them step by step.



For more information, see [Embedded Guides in Field Service mobile app \(preview\)](#).

## Manage user settings

In the new mobile user experience, app users can tap the user icon to access the app settings.



- **Timezone:** Set the time zone for the app. If the configuration of the device and the user's settings in Dynamics 365 don't match, the system updates the Dynamics 365 profile to align with the device settings.
- **Language:** Set the language for the mobile app.
- **Map:** Define the behavior of the app when getting directions to a customer site and choose the default map provider.

- **Apps:** If a user has access to multiple Field Service mobile app modules, they can choose which app module to load. They can also access app module settings to [turn on optimized image upload](#) or get debugging information.

### Note

- The new mobile UX caches changes to metadata for up to 8 hours. To see changes more quickly, users need to sign-out and sign back into the application.
- The new mobile UX uses the time zone and location of the device, while the forms built for Unified Interface use the system's time zone. If there's a mismatch between the device and the system, users are requested to match system time with the device. If the language of the device is not enabled in the system, users might see mixed languages.

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

# Use Power Apps to configure the Field Service mobile app

Article • 12/13/2024

Because the Dynamics 365 Field Service mobile app is built on Power Platform, administrators and developers can use the same tools that are available for configuring Dynamics 365 and Microsoft Power Apps. See the following table for some examples.

[Expand table](#)

Area	Microsoft Power Platform reference doc
Model-driven apps	<a href="#">Model-driven apps developer documentation</a>
Views	<ul style="list-style-type: none"><li>- <a href="#">Create and edit public or system model-driven app views</a></li><li>- <a href="#">Customize entity views</a></li></ul>
Custom iframe integration	<a href="#">Use IFRAME and web resource controls on a form</a> . Don't use embedded IFRAMES that require cookie-based authentication.
Custom HTML pages	<a href="#">Webpage (HTML) web resources</a>
Commands on forms and views	<ul style="list-style-type: none"><li>- <a href="#">Command bar or ribbon presentation</a></li><li>- <a href="#">Define ribbon actions</a></li><li>- <a href="#">Define ribbon display rules</a></li></ul>
Event Handling (On Save, On Load, etc.)	<a href="#">Events in forms and grids in model-driven apps</a>
Business Logic / JavaScript	<a href="#">Apply business logic using client scripting in model-driven apps using JavaScript</a>
Client Scripting	<a href="#">Apply business logic using client scripting in model-driven apps using JavaScript</a>
Mobile Offline supported capabilities and limitations	<a href="#">Mobile offline capabilities and limitations</a>
Custom controls	<a href="#">Additional custom controls for model-driven apps</a>
Canvas apps	<a href="#">Embed a canvas app on a model-driven form</a>
Mobile user feedback for your organization	<a href="#">Learn about Microsoft feedback for your organization</a>

# Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

# Edit the navigation and views on the mobile app

Article • 08/28/2024

The Field Service Mobile app module is a model-driven app, which you can edit in Power Apps so it matches your business scenario.

To change things like the navigation, form, or views, [you need permissions to sign in to Power Apps and permissions to edit model-driven apps](#). Usually, the environment maker, system administrator, or system customizer security role have the permissions to create or edit apps.

## Edit the navigation

In [Power Apps](#), open the environment with [the app you want to edit](#).

In the app designer in Power Apps, you find the current navigation structure with groups of pages. You can [edit the navigation and add or remove groups and pages](#).

## Edit mobile views

For every table in the navigation, you can choose the views available on mobile app. For more information, see [Understand model-driven app views](#). Configuring views for the new user experience works the same way as for the Unified Interface experience. However, you can't change the bookings [view in the new experience](#).

You can also [customize views with code](#) or [customize the booking calendar](#).

## Next steps

- [Overview of the model-driven app designer](#)
- [Understand model-driven app components](#)
- [Model-driven apps developer guide](#)

---

## Feedback

Was this page helpful?

 Yes

 No

Provide product feedback ↗

# Customize the booking view

Article • 08/28/2024

## Unified Interface UX

By default, the booking calendar control shows a predefined set of details associated with bookings.

You can customize this control to include up to three more columns with optional labels or change the incident type column.

If you're using the mobile app offline, be sure the record types from which attributes are included on the calendar are also included in your mobile offline profile.

For a guided walkthrough using the classic designer, check out the following video.

<https://www.microsoft.com/en-us/videoplayer/embed/RWJJdI?postJs||Msg=true> ↗

## Add the columns to the Bookings view

The new fields can be modified to show data from any column in the *Booking* view of the *Bookable Resource Booking* table.

Add columns to model-driven app views that have a relationship to the *bookable resource booking* table. For example, to show *Work Order Priority*, select the *Work Order* table, then add the *Priority* column to the view. Note the name of the column—you'll need it when customizing the field. In our example, the name is *msdyn\_priority*.

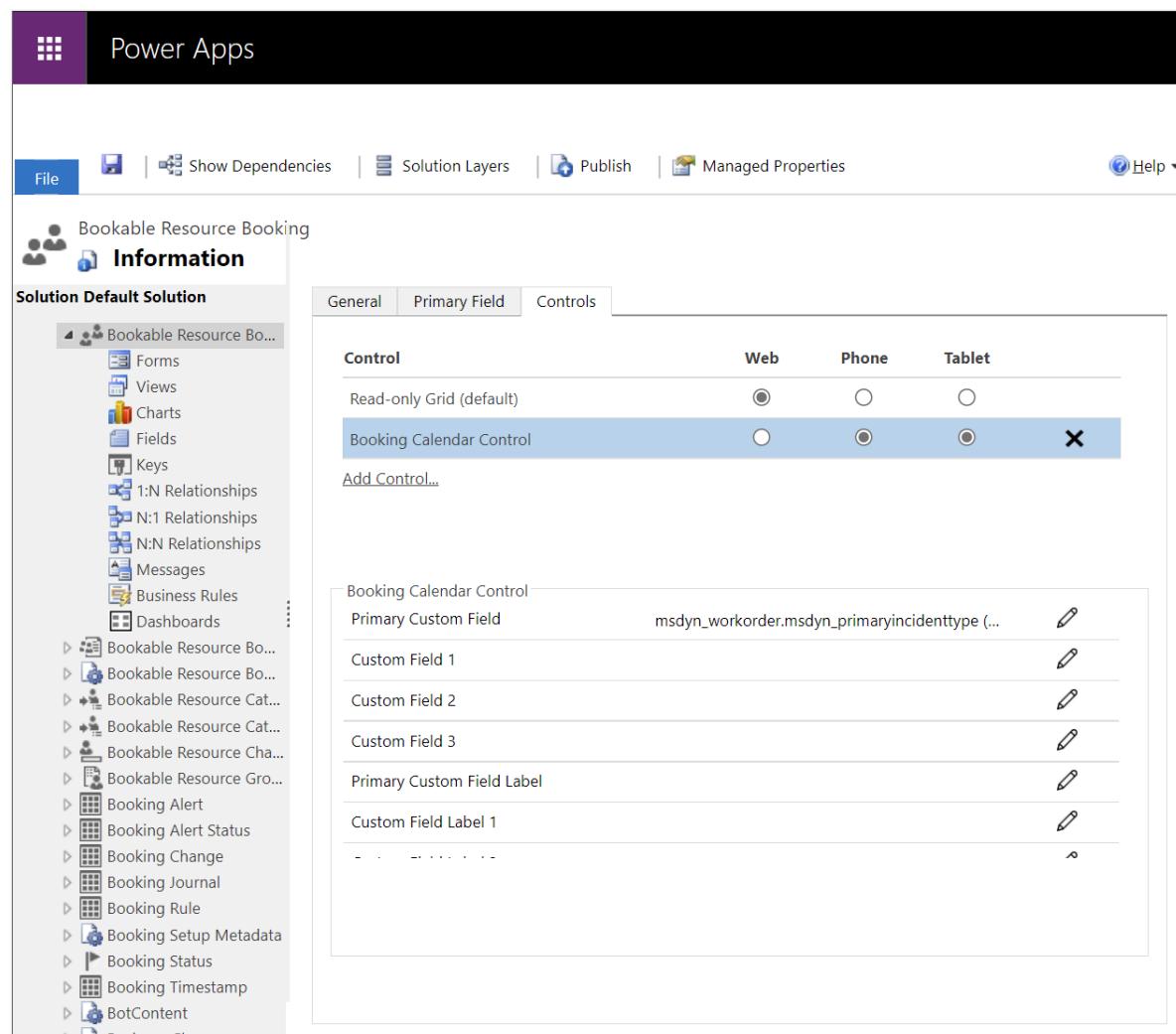
### ⓘ Note

For columns from a different table, you must create a relationship between the bookable resource booking and that table. When referencing the relationship in the control, be sure to reference the full lookup field name as

`fieldName.Attribute`.

## Configure the Booking Calendar Control to show the columns

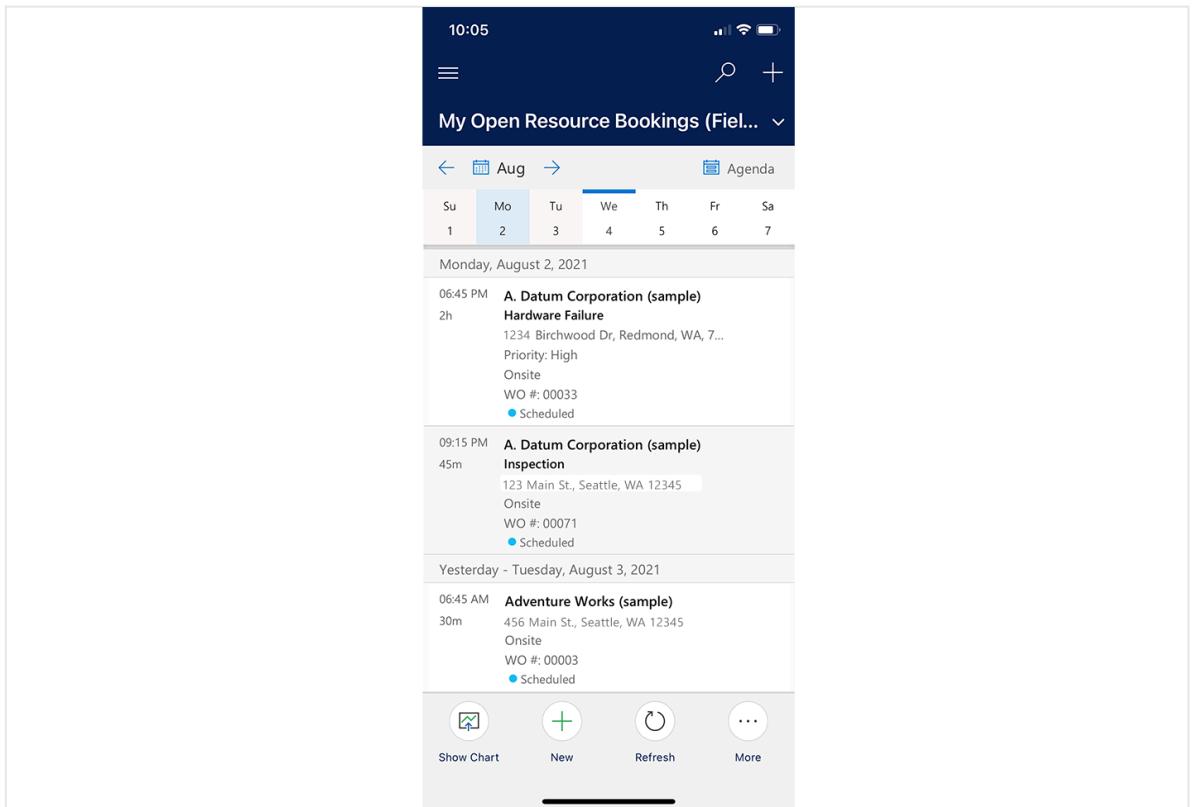
Once the view has the desired columns, open Advanced Settings and go to **Customizations**. Select the bookable resource booking entity, and then select **Controls and Booking Calendar Control** to configure the control properties.



To configure fields, select the **Edit icon** next to the field. Input the reference to the field as an attribute of bookable resource booking, or as `linkedEntity.attribute`. In this example, we added the work order priority (`msdyn_workorder.msdyn_priority`) as **Custom Field 1**.

You can also configure the optional custom field label associated with the custom field. This label is displayed as entered, with an added colon after the field and before the value. In our example, we entered *Priority*.

Fields without data are hidden.



Custom fields are also shown on the calendar's day view when the booking duration is long enough to support the extra text. Custom data is also shown when opening booking details from the map view.

#### ⓘ Note

If you have configured multiple views for the mobile app, we recommend that you include the new fields into each view that can be accessed from the mobile app.

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

# Use deep links to the Field Service mobile app

Article • 12/13/2024

Deep links let users move from one application to another on computers and mobile devices. Simple examples include a mobile app deep-linking to Facebook to sign in, an email address deep-linking to a mail app to compose a message, or a website deep-linking to an app store to download a related mobile app. Because multiple apps might be needed to complete onsite work, an organization can allow technicians to create deep links from the Dynamics 365 Field Service mobile app to other apps and vice versa.

## Open an entity record or entity list view in the mobile app

You can open an `entityrecord` or an `entitylist` view in the Dynamics 365 Field Service mobile app by using deep link URLs from other apps. When you follow the link from an external app, the target element opens in the Field Service mobile experience.

If you're already signed in to your instance in the app, the target record is displayed when you follow the link from an external app. Otherwise, you're prompted to sign in to your instance in the mobile app; after you're signed in, the target element is displayed. You must have the Field Service mobile app to use this feature.

## Query string parameters for the URL

Use the following application handler and query string parameters to compose the URL.

Deep links for Field Service should start with the following:

```
ms-apps-fs://<org-url>_<app-id>?tenantId=<tenant-id>&isShortcut=true&appType=AppModule&openApp=true&restartApp=true&forceOfflineDataSync=true
```

 Expand table

Parameter	Description
<code>&lt;org-url&gt;</code>	Connects to the correct org URL. Don't include https://
<code>&lt;app-id&gt;</code>	Opens the correct app module.
<code>tenantId</code>	Connects to the correct tenant.
<code>forceOfflineDataSync</code>	Ensures that data sync is triggered so that all the latest data is available.

If opening an `entityrecord` form or creating a new `entityrecord`, use the following parameters.

 Expand table

Parameter	Description
<code>etn=&lt;entity-logical-name&gt;</code>	Designates which entity to go to
<code>pagetype=entityrecord</code>	Indicates that the target is a form
<code>extraqs=&lt;form-id&gt;</code>	Designates which form to open for the <code>entityrecord</code> ; if not specified, the default form will open. The <code>extraqs</code> parameter can also be used to default field values.
<code>id=&lt;record-id&gt;</code>	Designates which specific record to go to; if left blank, the create form for the entity will open

If the link goes to an `entitylist` view, add the following parameters.

 Expand table

Parameter	Description
<code>etn=&lt;entity-logical-name&gt;</code>	Designates which entity to go to
<code>pagetype=entitylist</code>	Indicates that we're going to a view
<code>viewid=&lt;view-id&gt;</code>	Designates which view to open
<code>Viewtype= &lt;1039 if system view, 4230 if personal view&gt;</code>	Designates whether we're going to a system view or a personal view

## Example URLs

[Expand table](#)

Action	Example of a deep-link URL
Open a create form for Bookable resource booking	ms-apps-fs:// <org-url>_<app-id>?tenantId=<tenant-id>&isShortcut=true&appType=AppModule&openApp=true&restartApp=true&forceOfflineDataSync=true&etn=bookableresourcebooking&pagetype=etc
Open a Bookable resource booking with id=xyz	ms-apps-fs:// <org-url>_<app-id>?tenantId=<tenant-id>&isShortcut=true&appType=AppModule&openApp=true&restartApp=true&forceOfflineDataSync=true&etn=bookableresourcebooking&pagetype=etc

## Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback](#) 

# Create workflows and scripts for the mobile app

Article • 08/28/2024

Administrators can use tools like Power Automate flows, classic background workflows, JavaScript, or business rules to automate business processes. Some processes work when the Dynamics 365 Field Service mobile app runs [offline first](#) and others require internet connectivity.

## Power Automate flows and classic Dataverse workflows

Workflows and flows are commonly used to automate tasks based on triggers and conditions. We recommend [using Power Automate to build flows](#) and consider replacing existing workflows with flows. There are several advantages for flows. For more information, see [Comparison of workflows and flow](#).

Workflows and flows require an internet connection. When the app is running in offline-first mode with an internet connection, saving a record triggers the workflow or flow. Results are downloaded with the next data sync.

## Business rules

Business rules and recommendations apply logic without writing code or creating plug-ins. For more information, see [Create a business rule for a table](#).

## Custom process actions

Actions open a broad set of options to compose business logic. [Use custom process actions](#) to perform several operations in sequence.

Actions require an internet connection.

## JavaScript web resources

You can add [JavaScript web resources](#) to mobile forms and include them in offline profiles.