

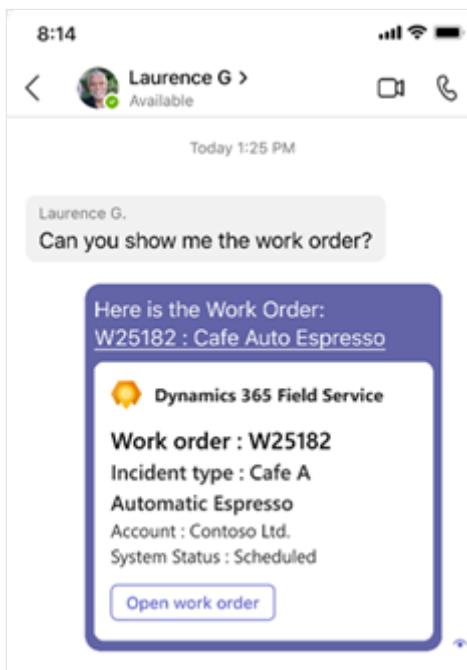
3. If you made changes, select **Save**.

Share work order information

ⓘ Note

This feature will be available April 30, 2024.

You can share links to work orders that automatically expand to provide key details. Copy the work order link from the Field Service web app or select the **Copy** icon when [viewing the work order](#) in Teams.



Call for remote collaboration through Remote Assist

1. You can quickly get assistance from a remote expert in three places in Teams:

- In your Viva Connections dashboard, select **Open** on the **Remote Assist** tile.
- In the Field Service app **Home** tab, select **Launch website** on the **Remote Assist support tool** tile.
- When you have a work order in progress, select **Launch Remote Assist** in the work order details.

2. Search for and select the contact you want to call.

3. Select **OK** to allow Remote Assist to access your camera, and then select **Launch call**.

[Learn more about Dynamics 365 Remote Assist.](#)

Enable the Microsoft Copilot for Field Service work orders

Once an admin sets up the Field Service Plugin for Microsoft Copilot, any user can quickly enable the plugin in Teams.

1. At the bottom of your Teams window, select the **Plugin**  icon.
2. Select **Dynamics 365 Field Service**.

The [Microsoft Copilot for Field Service work orders](#) is available to chat.

Switch environments

If you have permissions to work in multiple environments, you can easily switch between them without having to sign out and sign in each time.

1. In the Field Service app, select **Switch environments** on the **Signed in to Dynamics 365** tile in either the **Home** or **Settings** tabs. On a mobile device, select the **Settings** tab.
2. Select your Field Service environment.
3. After the environment is validated, select the **Home** tab to go to the Teams **Home** page or select **Open Viva Connections** to go to your Viva Connections dashboard.

Your dashboard might look different, depending on your role in the new environment. For example, if you're a frontline manager in one environment and a frontline worker in the environment you switched to, the new environment shows your frontline worker dashboard.

Dynamics 365 Field Service Plugin for Microsoft Copilot

Article • 12/03/2024

Important

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

With the Dynamics 365 Field Service Plugin for Microsoft Copilot, Dynamics 365 Field Service frontline managers and workers can access key work order information by asking Microsoft Copilot questions within Microsoft Teams. Users with a Microsoft 365 Copilot license can simply state in chat what they need using natural language to receive specific information related to their work orders in Field Service. This feature adheres to [responsible AI guidelines](#).

Copilot can also search through a work order's attachments to provide answers to questions. Attachments can be knowledge articles, manuals, or any documentation that can assist the technician in completing the work order. Frontline managers must first upload the information relevant to the work order so that Copilot can access the information. Go to [Add attachments to a work order](#).

After a frontline manager uploads any relevant information to the work order, frontline workers can quickly get answers such as required tools or step-by-step instructions from Copilot.

To access this chat feature, an admin must [set up Microsoft Copilot for Field Service work orders](#).

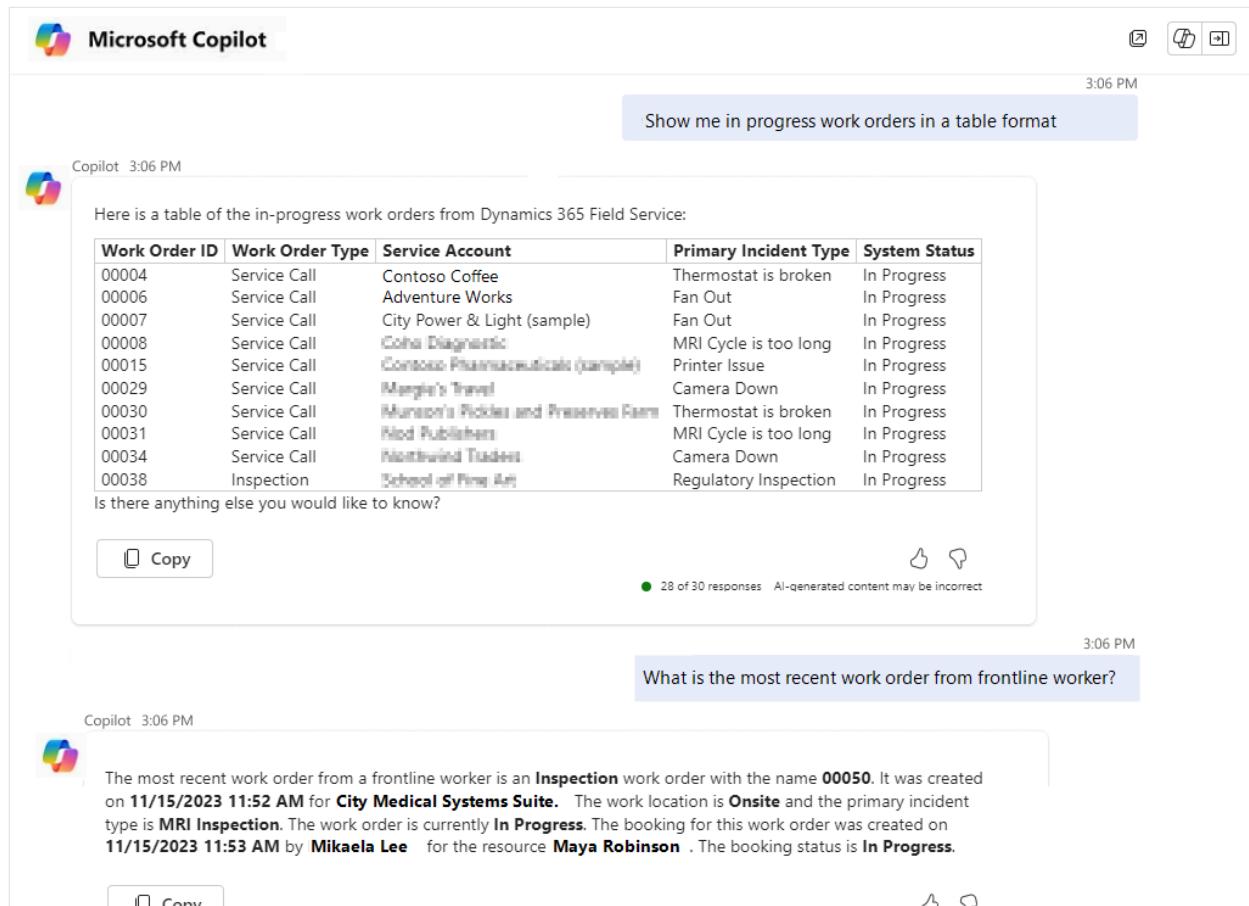
Best practices

- Ask any straightforward question about Field Service work orders. Ambiguous questions such as "What are the most important work orders" might not return results because "most important" isn't a defined status. Instead, ask "What are the high-priority work orders?"
- Be specific about the expected outcomes. For example, if you want results in table format, then use the phrase "in table format." If you want a consolidated result or

summary, be specific. For example, "What is the incident type and service account for work order 00041?"

Frontline managers and dispatchers

Get summarized information about key work orders that are important to you



Microsoft Copilot

3:06 PM

Show me in progress work orders in a table format

Copilot 3:06 PM

Here is a table of the in-progress work orders from Dynamics 365 Field Service:

Work Order ID	Work Order Type	Service Account	Primary Incident Type	System Status
00004	Service Call	Contoso Coffee	Thermostat is broken	In Progress
00006	Service Call	Adventure Works	Fan Out	In Progress
00007	Service Call	City Power & Light (sample)	Fan Out	In Progress
00008	Service Call	Coho Diagnostic	MRI Cycle is too long	In Progress
00015	Service Call	Contoso Pharmaceuticals (sample)	Printer Issue	In Progress
00029	Service Call	Margie's Travel	Camera Down	In Progress
00030	Service Call	Munson's Pickles and Preserves Farm	Thermostat is broken	In Progress
00031	Service Call	Nord Publishers	MRI Cycle is too long	In Progress
00034	Service Call	Northwind Traders	Camera Down	In Progress
00038	Inspection	School of Fine Art	Regulatory Inspection	In Progress

Is there anything else you would like to know?

Copy

28 of 30 responses. AI-generated content may be incorrect

3:06 PM

What is the most recent work order from frontline worker?

Copilot 3:06 PM

The most recent work order from a frontline worker is an **Inspection** work order with the name **00050**. It was created on **11/15/2023 11:52 AM** for **City Medical Systems Suite**. The work location is **Onsite** and the primary incident type is **MRI Inspection**. The work order is currently **In Progress**. The booking for this work order was created on **11/15/2023 11:53 AM** by **Mikaela Lee** for the resource **Maya Robinson**. The booking status is **In Progress**.

Copy

Ask for detailed work order information



3:05 PM

what is the status of work order 00019?

Copilot 3:05 PM

According to the information I found, work order 00019 is an **Inspection** work order for **Fabrikam Residences** created on **11/15/2023 11:51 AM**. The work location is **Onsite** and the primary incident type is **Regulatory Inspection**. The system status of the work order is **Scheduled**.

There is a booking associated with this work order for **Anthony Ivanov** on **11/28/2023** from **2:46 PM** to **5:13 PM**. The booking status is **Scheduled** and the estimated arrival time is **11/28/2023 3:13 PM**.

Copy



1 of 30 responses. Ai-generated content may be incorrect

3:06 PM

Give me the full details for work order 00045 in table format



Copilot 3:06 PM

Here are the full details for work order 00045:

Work Order ID	Work Order Type	Priority	Created On	Service Account
00045	Service Call	High	11/15/2023 11:52 AM	VanArsdel Ltd.
Total Amount	Work Location	Primary Incident Type	Taxable	Price List
\$0.00	Onsite	Thermostat is broken	No	Default Price List
Transaction Currency ID	Is Follow Up	Follow Up Required	Billing Account	System Status
US Dollar	No	No	VanArsdel Ltd.	In Progress
State or Province	Postal Code	Country	City	Address
WA	98075	United States	Sammamish	3016 Issaquah-Pine Lake Road SE
Booking ID	Created By	Estimated Arrival Time	Resource	Booking Status
1	Binayak Silwal	11/20/2023 10:05 AM	Samuel McBride	Traveling

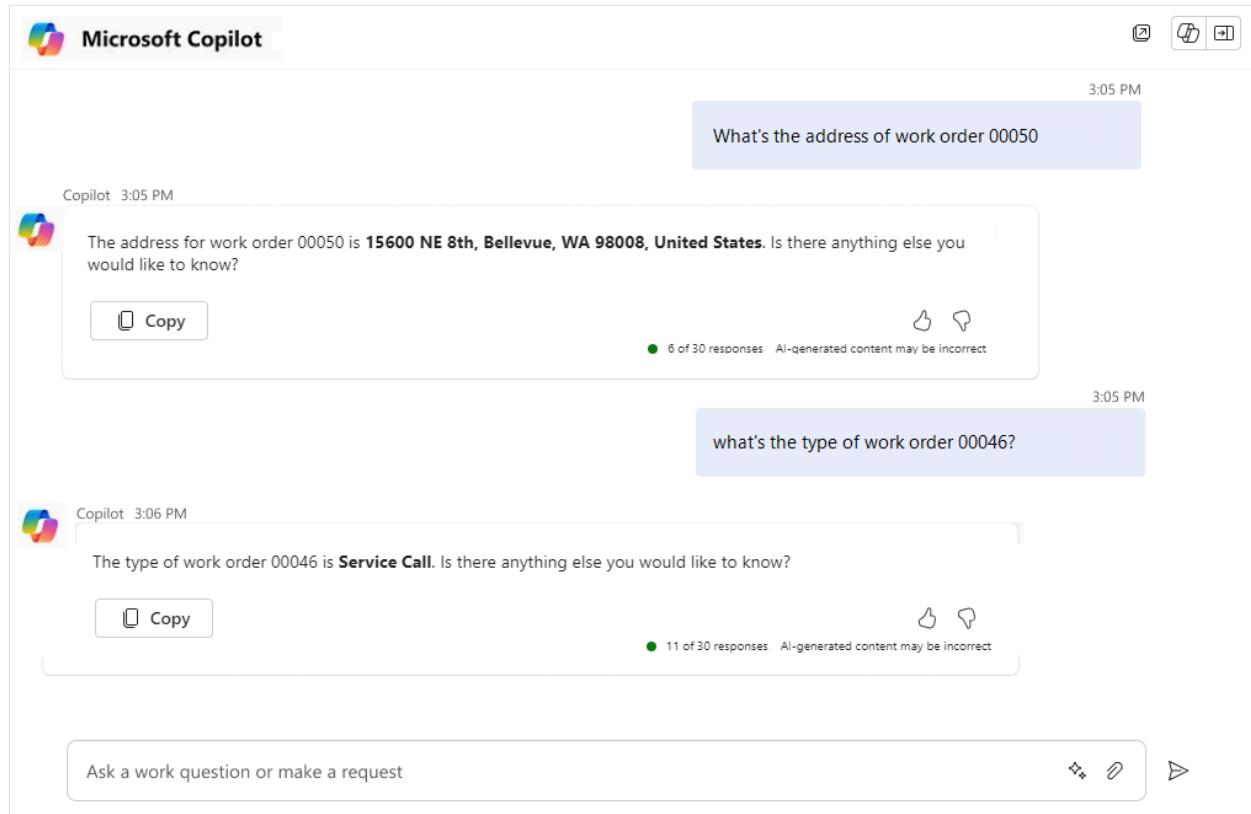
Is there anything else you would like to know?

More sample questions

- Show me work orders created in October for {customer name}.
- Can you give me details on work orders {several work order numbers} in a table?
- What are the details for work order {work order number}? Can you summarize in a paragraph?
- Can you give me the incident type and service account of work orders {several work order numbers} in table format?
- What is the progress of work order {work order number}?
- What type of work order is {work order number}, so I can assign the right technician?
- Who is the technician for work order {work order number}?
- What is the work order number assigned to {email_address}?
- Show me bookings for next week in a table.
- Show me high priority work orders created in November.
- How many work orders are in progress?
- How many work orders are unscheduled and high priority?
- How many work orders are there for {customer name} and what are their statuses?
- Can you find work orders from last week?

Frontline workers

Get specific information about a work order



The screenshot shows a Microsoft Copilot interface with two interactions:

- Interaction 1:** Copilot asks for the address of work order 00050. It responds with the address: 15600 NE 8th, Bellevue, WA 98008, United States. It also asks if there is anything else to know.
- Interaction 2:** Copilot asks for the type of work order 00046. It responds with Service Call. It also asks if there is anything else to know.

Both interactions include a "Copy" button, a thumbs up/down icon, and a note that the content is AI-generated and may be incorrect.

Ask for instructions for a work order (preview)

[This article is prerelease documentation and is subject to change.]

ⓘ Important

- This is a preview feature.
- Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

To ask for information from uploaded attachments such as installation manuals, maintenance documents, or troubleshooting notes, tell Copilot to search through documents.

ⓘ Note

Frontline managers must [add documents to the work order timeline or add knowledge articles](#) so Copilot can search through them and provide answers.

 Microsoft Copilot

Friday 8:06 PM

Search through my documents and list the tools required to replace the rSSD in the Surface Laptop

Copilot Friday 8:06 PM

According to the Surface Laptop 3 and 4 English Service Guide, the tools required to replace the rSSD in the Surface Laptop are:

- Software Tool – SDT
- Isopropyl Alcohol Dispenser (use only 70% IPA)
- 5IP (Torx plus) driver
- Anti-static wrist strap (1M Ohm resistance)
- ESD-safe battery cover (13.5" or 15") (recommended) 

 Copy  

1 reference 

● 1 of 30 responses AI-generated content may be incorrect

 Microsoft Copilot

1:11 PM

Search through my documents and find out how to remove the non-skid foot pad 

Copilot : 1:11 PM

According to the Surface Laptop 3 and 4 English Service Guide, here are the steps to remove the non-skid foot pad from your device: 

1. Power off the device and ensure it is disconnected from a power supply.
2. Flip the device over onto a clean surface free of debris with the device bottom facing up for access to the feet for removal.
3. To remove the front feet, insert the pointed end of a plastic spudger tool from the long side of the device under the foot. There is a designed gap in the foot located at the center of the outside edge of the foot. Point the plastic tool directly in the middle of the foot starting from the front edge and push in towards the middle of the device. Removal works best if the spudger is at a relatively low angle relative to the tabletop. Use plastic tweezers/spudger to lift one edge of each foot. Grasp the loose end and pull the foot from the D-bucket.
4. To remove the back feet, perform the same steps as for the front feet but from the back side of the device and along the long edge. Removal works best if the spudger is at a relatively low angle relative to the tabletop.
5. Remove any adhesive liners in the foot pockets. Use IPA and cotton wipes to clean off any adhesive residue within the foot pocket.

Is there anything else you would like to know?

 Copy  

1 reference 

● 1 of 30 responses AI-generated content may be incorrect

 Dynamics 365 Field Service

External | Dynamics 365 Field Service 

Answers that came from an attachment are listed under **reference** at the bottom of the answer.

More sample questions

- How do I handle the battery of the Surface laptop safely? Provide a list of recommendations.
- What temperatures are in the Surface laptop battery's operating range?
- How do I separate the C-cover from the Surface laptop?
- What service tools are required to replace the non-skid foot pad on the Surface laptop?
- What are the details for work order {work order number}? Can you summarize?
- Give me the full details for my most recent work order.

- Are there any work orders with priority set to high?
- Tell me more about the primary incident type of work order {work order number}.
- Show my work orders that are scheduled for next week in a table.
- What is the price list for work order {work order number}?
- How many work orders are there for {customer name} and what are their statuses?
- Can you find my work orders from last week?

Next steps

- [FAQ about Dynamics 365 Field Service Plugin for Microsoft Copilot](#)
 - [Set up Microsoft Copilot for Field Service work orders](#)
-

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Overview of Microsoft Teams integration

Article • 11/26/2024

In today's business scenario, business groups often collaborate across departments while working on a marketing campaign, pursuing a sales opportunity, or solving a customer issue. Dynamics 365 and Microsoft Teams integration allows you to speed up the flow of work, enabling anyone in an organization to view and collaborate on Dynamics 365 records, from within the flow of work with Teams.

Using Teams integration, you can invite anyone in the organization to view and collaborate on customer records right within a Teams chat or channel. You can also make and receive calls from within Dynamics 365 and get the work done more effectively. As a seller, you can share details on the sales opportunity, customer history, and more. As a customer service representative, you can share the customer case record, troubleshooting steps, and track the follow-up tasks.

Teams can be integrated with Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Field Service, Dynamics 365 Marketing, and Dynamics 365 Project Service Automation.

ⓘ Note

Microsoft Teams integration is not available for guest users and is not supported on the following platforms:

- Dynamics 365 Customer Engagement (on-premises)
- Microsoft Dataverse environment
- Legacy web client or legacy apps
- If Dynamics 365 and Microsoft Teams are in different tenants
- Mobile devices

Dynamics 365 and Teams integration is built around the following pillars:

- **Collaborate seamlessly:** Invite anyone in your organization to view and contribute to Dynamics 365 customer records within the flow of a Teams chat or channel.
- **Accelerate productivity:** Connect conversations across the organization. Meet, chat, call, and collaborate in Dynamics 365.

- **Enhance engagement:** Bring related conversations together with real-time contextual and suggested chats, and capture customer sentiment to stay in tune with their needs.
- **Integrate experiences:** Increase audience engagement during and after events across multiple channels with engaging content and recommendations.

Features of Teams integration

Microsoft Teams is integrated into Dynamics 365 and additional capabilities are added to bring Dynamics 365 data into Teams. This helps you in connecting and collaborating in the flow of work with anyone, anywhere with Dynamics 365 and Microsoft Teams.

- **In Dynamics 365**
 - **Engage in Teams chat:** You can engage in a Teams chat conversation from within Dynamics 365 while working on a record. More information: [Using Microsoft Teams chat in Dynamics 365](#)
 - **Link Dynamics 365 records to Teams channels:** You can easily connect a Dynamics 365 record to an existing Teams channel or create a new team or channel. More information: [Enhanced Collaboration Experience with the Dynamics 365 app for Microsoft Teams](#)
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 - **Integrate Dynamics 365 and Teams meetings:** Microsoft Teams meeting integration allows you to stay in the flow of work, whether you're in Dynamics 365 or Teams. In Dynamics 365, you can create and join Teams meetings directly from Dynamics 365. More information: [Integrate Dynamics 365 and Teams meetings](#)
- **In Microsoft Teams**
 - **Display a record or view in tab:** You can add a Dynamics 365 record or a view as tabs into a Teams channel. For example, you can add a tab for an account named Fourth Coffee. When you select the tab, the record's detail is displayed in its form. Similarly, you can add the view My Open Opportunities as a tab.

When you select the tab, you see all your open opportunities. More information: [Basic Collaboration Experience with the Dynamics 365 app for Microsoft Teams](#)

- **File integration:** You can co-author documents using Microsoft 365 and automatically sync with Dynamics 365 records that are linked to a Teams channel. Files uploaded to a Teams channel are associated with the Dynamics 365 record. Similarly, files uploaded to the linked Dynamics 365 record are visible in the Teams channel. More information: [Document management with Microsoft Teams integration](#)
- **Work with Dynamics 365 records in a Teams meeting:** With Microsoft Teams meeting integration, you can:
 - View and update Dynamics 365 records seamlessly in a Teams meeting.
 - Capture notes and tasks seamlessly during a Teams meeting. Your notes and tasks automatically sync to Dynamics 365.

More information: [Configure Microsoft Teams meeting integration in Dynamics 365](#)

Questions and feedback

If you have additional feedback or questions regarding this feature, contact Microsoft Support.

Privacy notice

While using customer engagement apps in a Dynamics 365 bot in Microsoft Teams, the user's text inputs are analyzed for understanding the underlying query/intent. The user's input such as "Search account Contoso" is routed to a service within Azure Cognitive Services called Language Understanding (LUIS). [Read more about LUIS.](#) The LUIS service disambiguates or understands the intent of user input (in this case, the intent is to find information) and the target entity (in this case, the intended entity is an account named Contoso). This information is then passed on to Microsoft's [Azure Bot Service](#), which interacts with Dynamics 365 data and retrieves the desired information for the user query.

By installing and allowing access to use of the bot, you agree to allow the LUIS service and Azure Bot Service to process the intent behind the input – which results in an enhanced conversational user experience. The LUIS service and Azure Bot Service may have varying levels of compliance compared to Dynamics 365 Sales apps. While the LUIS service has access to only the user queries and is not designed to be connected to the

user's Dynamics 365 data or account, a user of the Dynamics 365 Sales bot could voluntarily enter a query containing Customer Data, Personal Data or other data and such query content could get sent to the LUIS service and Azure Bot Service.

The content of user's queries and messages is retained in the LUIS system for a maximum of 30 days, encrypted at rest and is not used for training or service improvement. Read more about [Cognitive Services](#).

To manage admin settings for apps in Microsoft Teams, go to the Microsoft 365 admin center and open **Settings > Services & add-ins**, then choose Microsoft Teams. If you're signed in as a Microsoft 365 admin, you can [access these controls here](#), including the ability to uninstall.

See also

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-

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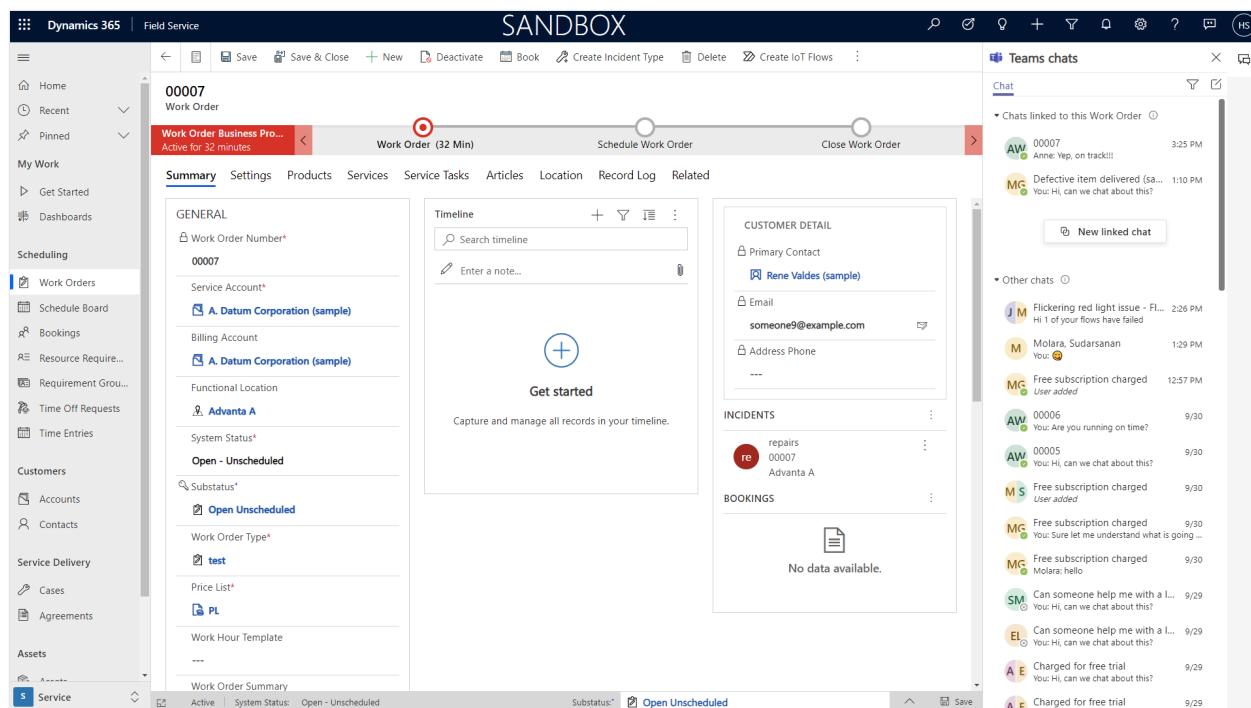
 No

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Collaborate on work orders with Microsoft Teams

Article • 01/24/2024

Integrate with Microsoft Teams to chat with team members about work orders. The Teams integration helps find answers and fix issues the first time without leaving the Field Service app. It also lists team members that have previously worked on a work order. Connecting all the associated chats to a work order provides all chats related to that work order in one place.



For a guided walkthrough, check out the following video.

<https://www.microsoft.com/en-us/videoplayer/embed/RWOc1n?postJslIMsg=true>

Set up the Teams integration

An administrator must set up the overall integration between Microsoft Teams and Dynamics 365 apps. See [Install and set up Teams Integration](#).

Enable and configure collaboration settings in Field Service

An administrator must enable collaboration in the Field Service settings.

1. In Field Service, go to **Settings > Microsoft Teams Integration > Collaboration**. To enable or disable Microsoft Teams chat in other Dynamics 365 apps, see [Work with Microsoft Teams chat in Dynamics 365](#).
2. On the **Microsoft Teams collaboration and chat** page, turn on the toggle for **Turn on Microsoft Teams chats inside Dynamics 365**.

Microsoft Teams collaboration and chat
Seamlessly collaborate with Dynamics 365 team members.

Turn on the linking of Dynamics 365 records to Microsoft Teams channels Yes
Let people in your org connect records and views to Teams channels, and let them open records in Teams during meetings. [Learn more](#)

Turn on Enhanced Microsoft Teams Integration No
Allows pinning of records and views to a Teams channel directly from Dynamics 365 and suggests members to be added. Requires tenant admin permissions. [Learn more](#)

Turn on Confidential Labels No
Create private Teams and add sensitivity/confidentiality labels in the Enhanced Microsoft Teams Integration.

Turn on Microsoft Teams chats inside Dynamics 365 Yes
Engage in Teams chats with coworkers right from Dynamics 365. [Learn more](#)

Turn on for all Dynamics 365 apps
This will turn on Teams chat for all Dynamics 365 apps in your organization, including any that are added in the future.

Turn on for selected Dynamics 365 apps
Select the apps where you want to turn on Teams chat.

Show Teams chats on the connected record's timeline (Preview) No
Sync Teams chat data with Dynamics 365 records. This will allow chat activity to show up on the timeline. [Learn more](#)
 ⓘ Only a global administrator can turn on this setting.

Connect Teams chats to Dynamics 365 records
Select the record types that people can connect to Teams chats. [Learn more](#)

Work Order ...
Account ...
+ Add record types

More settings

Set who can disconnect chats
Go to the Power Platform admin center to give specific people and group permission to disconnect chats from records. [Learn more](#) Edit in security roles settings

Save

3. Select one of the following:

- **Turn on for all Dynamics 365 apps** – Enables Teams chat for all supported Dynamics 365 apps in your organization, including any that you add in the

future.

- **Turn on for selected Dynamics 365 apps** – Enables Teams chat for the apps you choose. If your organization already uses Teams, the selection you made previously remains. If you haven't yet set up Teams, it's enabled by default.

4. Save the changes.

In the **Connect chats to Dynamics 365 records** section, add all the tables you'd like to collaborate on.

Customize welcome message

When you start a new chat, predefined information creates a welcome message in the chat panel. You can customize the welcome message.

1. In Field Service, go to **Settings > Microsoft Teams Integration > Collaboration**.
2. Select the record type, such as Work Order.
3. Select **Message view**, and then select **Save**.

The first five columns in the view you choose appears in the welcome message when you invite someone to collaborate on a record.

Create a new chat

To [start a new chat](#), open a record for a table that is connected to the Teams integration.

Connect and disconnect existing chats

[Connect or disconnect an existing chat from a record](#).

Feedback

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 Yes

 No

[Provide product feedback](#) ↗

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See also

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-

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Document management with Microsoft Teams integration

Article • 07/15/2022

Document management with SharePoint lets you manage common document types, such as Word, Excel, PowerPoint, and OneNote. You can also create folders to save and manage those documents in customer engagement apps (such as Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Field Service, Dynamics 365 Marketing, and Dynamics 365 Project Service Automation), that are stored in SharePoint.

With Microsoft Teams integration with Dynamics 365, you can use document management with Microsoft Teams. It allows a user to co-author documents and automatically sync documents to customer engagement apps using SharePoint. For each tenant, there is a single SharePoint instance. Documents in Dynamics 365 and files in Microsoft Teams are all on the same SharePoint site. The subsites may be different but the root site is the same.

There isn't an automatic relationship between SharePoint permissions and permissions to customer engagement apps. To access documents between Microsoft Teams and customer engagement apps, you need explicit permission to use document management for customer engagement apps and SharePoint. For information:

[Permissions required for document management tasks](#)

Use the **Files** tab in Microsoft Teams or the **Documents** tab in your customer engagement apps, to store and manage documents in the context of a record on a SharePoint Server. Documents are stored on a SharePoint Server that allows a user on Microsoft Teams to access the documents on the SharePoint Server – as long as the user has appropriate permissions.

A user's access to files in Microsoft Teams or customer engagement apps depends on their access to the SharePoint site the file is stored in.

Note

- A guest user in Microsoft Teams will get error message when they try to access a pinned customer engagement app record.
- A user who is part of Microsoft Teams channel or team that does have access to customer engagement apps won't have access to the record in Microsoft Teams.

FAQs

1. Will guest users in Microsoft Teams have access to Dynamics 365 app records?

No, they will see an error message when they try to access a pinned record.

2. Will participants of Microsoft Teams chats and channels be able to see the pinned Dynamics 365 app record if they don't have a Dynamics 365 license?

No, they will see an error message when trying to access a pinned record.

3. Can I add a document to my record if it isn't pinned to a Microsoft Teams channel?

It depends on whether your Dynamics 365 tenant has SharePoint integration set up. If you have SharePoint integration enabled, then you can add a document.

If you do not have SharePoint integration enabled, you need to have pinned the record to a Microsoft Teams channel, otherwise you will not be able to add a document to the record.

4. What happens when I add documents to a Microsoft Teams channel connected to a Dynamics 365 app record and then remove a member from the channel?

It depends on if the user has permissions to access the Dynamics 365 app record.

If they have permissions to access the app record, then the user can edit the record in Dynamics 365, but can't access the files from Dynamics 365, SharePoint, or Microsoft Teams.

If they don't have permission to access the Dynamics 365 app record, then the user will get an error and they won't have access to the file from Dynamics 365, SharePoint, or Microsoft Teams.

5. What permissions does a user get when I add them to a Microsoft Teams channel that has pinned records and documents added to the files tab?

It depends on if the user has permissions to access the Dynamics 365 app record.

If they have permission to access the Dynamics 365 app record, then the user will be able to edit the record in Dynamics 365 and Microsoft Teams. They will also have read, write, delete files from Dynamics 365, SharePoint, and Microsoft Teams.

If they don't have permission to access to your Dynamics 365 app record, then they will get an error, but they'll have read, write, delete permission when they access the file from Dynamics 365, SharePoint, and Microsoft Teams.

6. What is the SharePoint location of the Microsoft Teams files tab versus the associated Dynamics 365 record's documents tab?

The information below applies when SharePoint integration hasn't been enabled for an entity in Dynamics 365.

When adding a file from a Dynamics 365 app record that is linked to a Microsoft Teams channel, the document is stored in a SharePoint folder with the file path [Team Name] > Documents > [Channel Name] > [File Name]. The file is visible in the Microsoft Teams channel's files tab and the Dynamics 365 app record's document associated grid.

Adding a file from a Dynamics 365 app record that is not linked to a Teams channel is not possible, since SharePoint integration isn't enabled.

When adding a file from a Microsoft Teams channel that is linked to a Dynamics 365 app record, the document is stored in a SharePoint folder with the file path [Team Name] > Documents > [Channel Name] > [File Name]. The file is visible in both the Microsoft Teams channel's Files tab and the Dynamics record's Document Associated Grid.

When adding a file from a Teams channel that is not linked to a Dynamics 365 app record, the document is stored in a SharePoint folder with the file path [Team Name] > Documents > [Channel Name] > [File Name]. The file is visible in the Microsoft Teams channel's Files tab.

When a Microsoft Teams channel has multiple Dynamics 365 app records associated with it, the document is stored in a SharePoint folder with the file path [Team Name] > Documents > [Channel Name] > [File Name]. The file is visible in the Microsoft Teams channel from the files tab and the document associated grid for all Dynamics 365 app records associated with the channel.

When a Dynamics 365 app record is linked to a Microsoft Teams channel, files already added to that Microsoft Teams channel show up in the document associated grid for that Dynamics 365 app record.

If a Dynamics 365 app record has been previously associated with a Microsoft Teams channel, and a user associate it with a new Microsoft Teams channel, another document location is added in Dynamics 365 for the new Microsoft Teams channel associated with the record. Users can switch back and forth between the document locations.

7. What is the SharePoint location of the Microsoft Teams files tab versus the associated Dynamics 365 app record's documents tab?

The information below applies when SharePoint integration has been enabled for a Dynamics 365 entity.

When adding a file to a Dynamics 365 app record that is linked to a Microsoft Teams channel from the document location for the Microsoft Teams channel, the document is stored in a SharePoint folder with the file path [Team Name] > Documents > [Channel Name] > [File Name]. The file is visible in both the Microsoft Teams channel's files tab and the Dynamics 365 app record's document associated grid in the document location for the Microsoft Teams channel.

When adding a file to a Dynamics 365 app record that is linked to a Microsoft Teams channel via the document location for the default site, the document is stored in the default SharePoint site that was set up with the Dynamics 365 environment. The document does not show up in the Microsoft Teams files tab for the channel associated with the record.

When adding a file from a Dynamics 365 app record that is not linked to a Microsoft Teams channel the document is stored in the default SharePoint site that was set up with the Dynamics 365 environment.

When adding a file from a Microsoft Teams channel that is linked to a Dynamics 365 app record, the document is stored in a SharePoint folder with the file path [Team Name] > Documents > [Channel Name] > [File Name]. The file is visible in both the Microsoft Teams channel's files tab and the Dynamics 365 app record's document associated grid in the document location for the Microsoft Teams channel.

When a Microsoft Teams channel has multiple Dynamics records associated with it, the document is stored in a SharePoint folder with the file path [Team Name] > Documents > [Channel Name] > [File Name]. The file is visible in the Microsoft Teams channel's files tab and the document associated grid in the document location for the Microsoft Teams channel for all Dynamics 365 app records associated with the channel.

When a Dynamics record is linked to a Microsoft Teams channel, files already added to that Microsoft Teams channel show up in the document associated grid for that Dynamics 365 app record in the document location for the Microsoft Teams channel.

When a Dynamics record is linked to a Microsoft Teams channel, files already added to that Dynamics 365 app record (on the default SharePoint site that was set up with the Dynamics 365 environment), the files are not visible in the Microsoft Teams channel's files tab and they remain on the default SharePoint site that was set up with the Dynamics 365 environment.

If a Dynamics 365 app record has been previously associated with a Microsoft Teams channel, and a user associates it with a new Microsoft Teams channel, another document location is added in Dynamics 365 app for the new Microsoft Teams channel associated with the record. Users can switch back and forth between the document locations.

8. Who can see which location?

Permission to see the location depends on the user permission to the folder in SharePoint. If the SharePoint folder was created in a Microsoft Teams channel, then the user will have read and write permission.

9. I have removed a user from the Microsoft Teams channel, but they still have access to the associated record from Dynamics 365. How can I restrict their ability to open, edit, and delete the document from Dynamics 365?

Access to the files depends on a user's permissions in SharePoint. To restrict a user from accessing these files, remove them the user from the SharePoint site.

10. What happens when I delete the Microsoft Teams account?

The files are removed from Dynamics 365 and SharePoint.

Use Teams mobile to annotate in a user's environment (preview)

Article • 11/20/2024

[This article is prerelease documentation and is subject to change.]

Spatial annotations can greatly enhance your communication and collaboration, especially when working with remote teams. Use spatial annotations to:

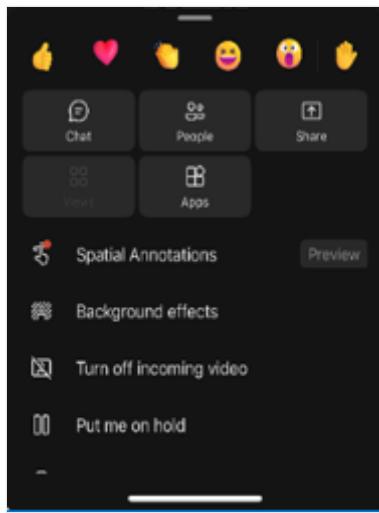
- **Quickly communicate detailed and complex instructions visually:** Enhance communication by using Remote Assist to engage remote collaborators through annotations.
- **Bring critical information into view:** Remote collaborators can offer precise guidance for different parts, including hard-to-reach parts. Use drawings and arrows to refer to specific parts of a machine or asset.
- **Solve problems in real time:** Technicians can share their real-time view with experts in remote locations to get the help they need, reducing travel time and cost.
- **Knowledge sharing and training:** Use annotations, photos, and videos to capture and share with the rest of your organization.

You can annotate in calls with Microsoft Teams mobile users if you have a Dynamics 365 Guides, Remote Assist, or Field Service licenses. Microsoft Teams desktop users can annotate in a mobile user's space. Use the **Spatial Annotations** toolbar in Teams to add annotations.

Important

- This is a preview feature.
- Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

1. While in a Teams mobile call, select **Spatial Annotations**.



2. Use the **Spatial Annotations** toolbar to place arrows or draw in your space for other callers to see or annotate in another user's space.

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

Button	Description
	Add an arrow. To add an arrow, tap where you want to place the arrow. To control the direction of the arrow, tap, hold, and rotate the arrow until it's facing the desired direction. To change the size of the arrow, tap, hold, and drag to the size you want. Release to lock the arrow in place.
	Add ink (draw).
	Change the arrow or ink color.
	Undo the most recent annotation you added.
	To delete all annotations that you added, select this button, and then select Delete Annotations . This action doesn't clear annotations made by other users.

 **Note**

Each call participant can only undo and delete their own annotations.

3. When you're done annotating, close the toolbar. All annotations persist even after you stop editing.

Feedback

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Universal Resource Scheduling for Dynamics 365 Field Service overview

Article • 12/22/2023

This article describes how Dynamics 365 Field Service uses [Universal Resource Scheduling](#).

Field service organizations often book technicians to complete work orders. Efficiently scheduling resources to requirements helps reduce travel time and costs.

Universal Resource Scheduling and Field Service work orders

When [installing Field Service](#), Universal Resource Scheduling gets added automatically.

Work orders and related entities are a part of Field Service and work seamlessly with resources, requirements and bookings of Universal Resource Scheduling.

In other words, Field Service defines **what** needs to be done and **where**, while Universal Resource Scheduling defines **who** can perform the work and **when**.

Generate requirements from a work order

For every work order, the system creates a related requirement. It outlines the specific details for resources that can perform the work order. Requirements are scheduled to resources and reference the work order.

By default, the system creates one requirement for each work order. However, a work order can have multiple requirements or a requirement group with multiple requirements. [Create incident types to configure templates for work order](#).

Requirements inherit attributes from the work order, such as name, location, duration, and more. Updating work order attributes updates requirement attributes. Manual edits to requirements can be made before scheduling, too.

⊗ Caution

Manually created requirements for work order don't synchronize automatically.

Book a resource for a requirement

After a work order and related requirement are ready for scheduling, dispatchers book the requirement to the most appropriate resource.

Booking a requirement related to a work order creates a bookable resource booking record that keeps track of which resource does the work, the status of the booking, travel time, and start/end times.

Scheduling personas

Learn about the scheduling roles that are common in a typical field service organization.

Dispatcher or scheduler

The dispatcher or scheduler matches requirements with the right resources to create bookings. Common job titles for this role include service managers, customer service reps, or traditional dispatchers. Their responsibilities can range between manually assigning all requirements, having the system automatically schedule all requirements and simply managing exceptions, or somewhere in between.

Even with a high level of automation, schedulers often manage exceptions and help ensure optimization and automation meet business objectives.

Scheduling analyst

The scheduling analyst is an emerging role as organizations adopt advanced scheduling functions like optimization, automated scheduling, and analytics. The ideal scheduling analyst has a healthy mix of scheduling, analytics, and optimization knowledge.

This role owns optimization schedules, along with accompanying scope, goals, and parameters.

Main scheduling capabilities

Dynamics 365 Field Service includes a broad set of scheduling capabilities.

Manual scheduling on the schedule board

The schedule board plays an important role across all types of scheduling. You can configure it to meet your scheduling requirements. For basic service scheduling, match a

requirement to a resource in a particular time slot on the schedule board.

Manual scheduling on the schedule board works well for emergency work or requirements with limited complexity.

Semi-automated scheduling with the schedule assistant

The schedule assistant uses requirement details to recommend times and resources for bookings. A dispatcher then chooses the best option for the booking and assigns the requirement.

You can launch the schedule assistant from the **Book** button on the ribbon from work orders, requirements, and also directly on the schedule board. Similar to the schedule board, it's customizable and you can also use it on other forms as needed.

Automated scheduling with the Resource Scheduling Optimization add-in

Resource Scheduling Optimization is an add-in for Dynamics 365 Field Service, which requires a separate license. It includes capabilities to automatically schedule requirements and optimize resource utilization based on custom logic. The add-in plays well with manual or semi-automated scheduling scenarios.

Enable Universal Resource Scheduling for Field Service

There are a few things you need to configure to enable Universal Resource Scheduling for Field Service.

1. [Enable Resource scheduling](#) for the *msdyn_workorder* entity.
2. [Enable location and map settings](#).
3. [Configure booking statuses](#) to let field technicians communicate the progress of their work to stakeholders.
4. [Enable auto-geocoding](#) to account for start and end location of resources.

 **Tip**

Work orders or requirements without location are treated as location-agnostic and the system doesn't consider the location during scheduling.

Measure scheduling effectiveness

Look at reports and relevant KPIs to measure how scheduling influences your defined business objectives over time.

Take a staggered approach to implement scheduling processes in your organization.

1. Start with [manual scheduling using the schedule board](#) to familiarize with the system logic and establish business processes.
2. Move to [semi-automated scheduling with the schedule assistant](#) to find resources that match the requirements faster.
3. Consider using the [Resource Scheduling Optimization add-in](#) to enable more automation for your scheduling needs. Kick it off with [single resource optimization](#) before rolling out [automation for your entire scheduling process](#).

Next steps

- [Use schedule board in Field Service](#)
- [Overview of the schedule assistant](#)
- [Get Resource Scheduling Optimization](#)

Feedback

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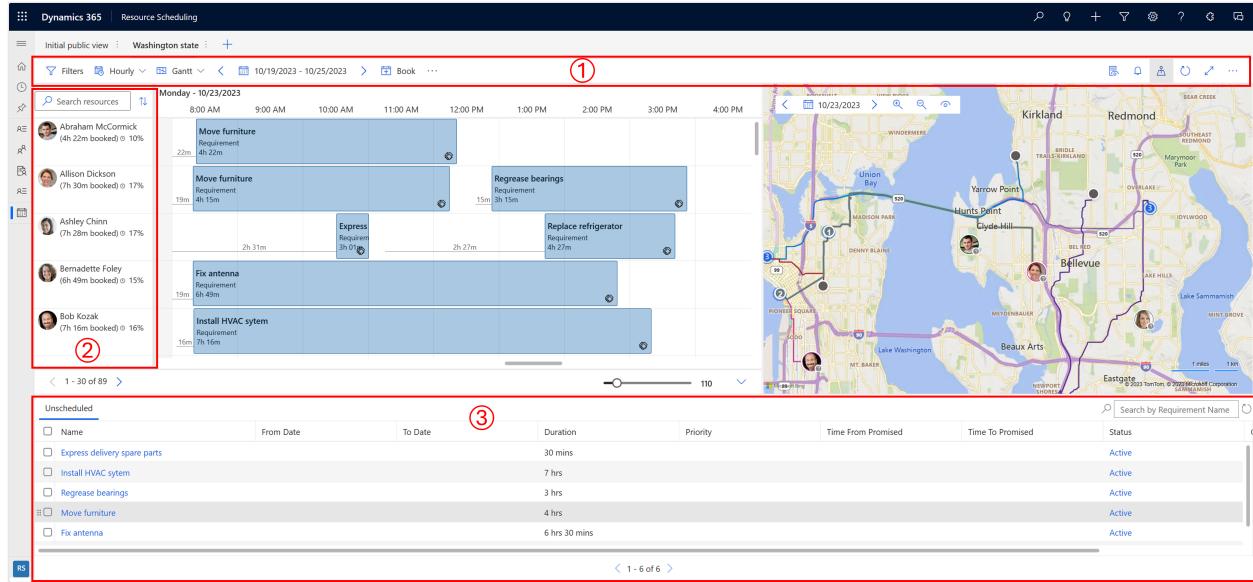
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Use the schedule board in Field Service

Article • 05/14/2024

This article discusses the main features and concepts of the schedule board for dispatchers and other users.



The screenshot shows the Dynamics 365 Resource Scheduling interface. The top navigation bar includes 'Dynamics 365', 'Resource Scheduling', 'Initial public view', 'Washington state', and a '+' button. The main area is divided into three main sections:

- 1. Gantt Chart Area:** Displays a timeline from 8:00 AM to 4:00 PM on Monday, October 23, 2023. It shows tasks for resources like Abraham McCormick, Allison Dickson, Ashley Chinn, Bernadette Foley, and Bob Koza. Each task is represented by a blue bar with its name, duration, and resource assigned.
- 2. Resource List:** Located on the left side, this pane lists resources with their availability status: Abraham McCormick (4h 22m booked) 10%, Allison Dickson (7h 30m booked) 17%, Ashley Chinn (7h 28m booked) 17%, Bernadette Foley (6h 49m booked) 15%, and Bob Koza (7h 16m booked) 16%.
- 3. Requirement Pane:** Located at the bottom, this pane lists unscheduled requirements with their details: Express delivery spare parts (30 mins), Install HVAC system (7 hrs), Re-grease bearings (3 hrs), Move furniture (4 hrs), and Fix antenna (6 hrs 30 mins). Each requirement has a checkbox, a 'From Date' and 'To Date' field, 'Duration', 'Priority', 'Time From Promised', 'Time To Promised', and a 'Status' field set to 'Active'.

[Expand table](#)

Number	Area
1	Actions area
2	Resource list
3	Requirement pane

Actions area

Filters

Apply filters to define which resources show on the schedule board. You can [configure the board settings so filters also apply to requirements](#).

Filter values are pulled from the *Bookable Resource* entity.

Select the ellipsis (...) > **Select Resources** to choose a subset of all resources for the schedule board. Applying filters then only filters the selected resources.

To make the applied filter configuration the default for all schedule boards, select ... > **Save as default**.

Select **Reset to default** to remove all applied filters. The list of selected resources resets when you remove the resources from the selection.

You always have to select **Apply** to see the changes on the schedule board.

Time scale

Switch between hourly, daily, weekly, and monthly view on the board. Choose the weekly or monthly views to see scheduled jobs at a higher level.

View type

- **Gantt**: A Gantt chart is a type of bar chart that illustrates a schedule. It's commonly used in show activities displayed against time. The position and length of an activity reflects the start date, duration, and end date.
- **List**: Shows resources in a list. Expanding a resource shows the selected time granularity in the selected time frame. You can change columns in the list.

Date range

Set the time frame that shows on the board. Use the arrows to move between time frames.

Book

Book a requirement manually. Select a requirement and a resource, start date/time, end date/time, booking status, and booking method.

Move bookings

Select **Show more schedule board actions (...)** > **Move bookings** to move bookings of a specific status to a different day. Moving bookings preserves times and other parameters.

Print schedule board

Select **Show more schedule board actions (...)** > **Print schedule board** to open the print settings where you can set schedule range, pagination, paper format, and orientation.

Select **Print** open the system print options.

Contextual details

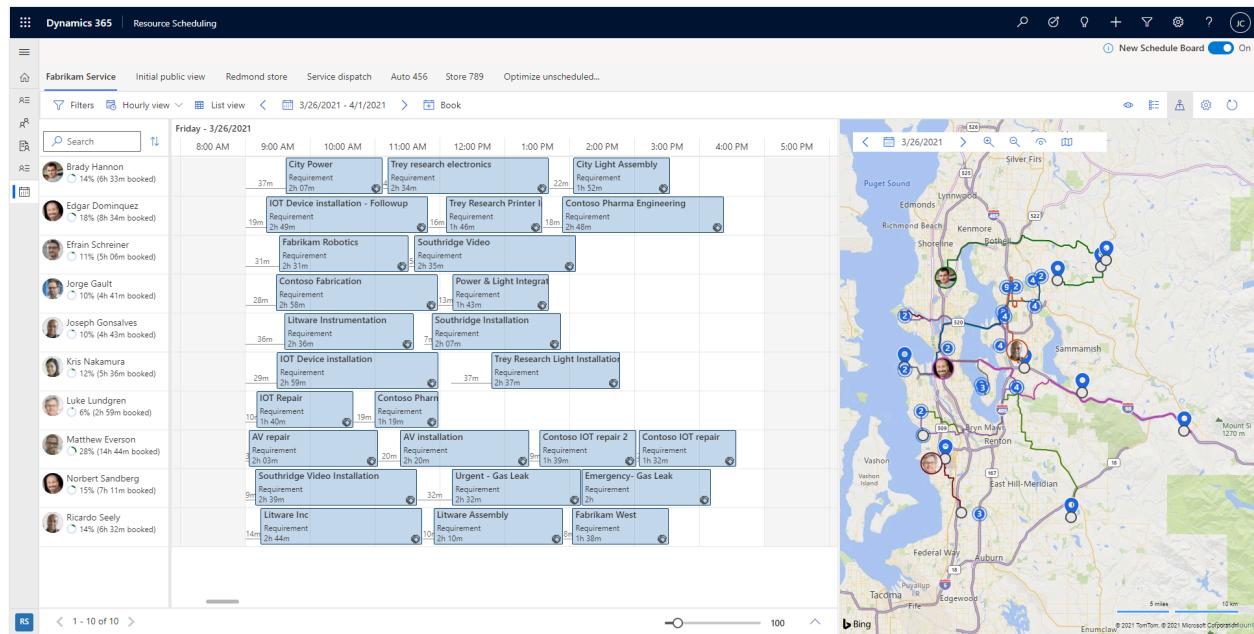
To see more details about the selected booking, resource, or requirement, open the details pane.

Booking alerts

To see your active booking alerts or create new alert, select the bell icon. For more information, see [Create and view booking alerts](#)

Map view

To see resources and requirements on a map, select the **Map view** icon.



On the map view, select a resource to see their planned route. The numbers indicate in which order requirements are scheduled to a resource.

Change the date to see the map for a different day. Zoom out of the map, to see grouped requirements and resources. Quickly identify areas with unscheduled jobs and start scheduling these jobs to the nearest resources. Select **View settings** to set which items show on the map.

You can drag an unscheduled requirement pin from the map to the resource timeline and schedule it to that resource. You can also drag the resource route to a nearby unscheduled requirement to schedule it and add it to the resource route.

On each resource pin associated with a user, there is an indicator icon in the lower-right corner representing how long ago the resource's location has been detected. Green indicates that the user has logged on and been detected since the start of the current day, while a grey question mark indicates that the location was last detected yesterday or earlier.

Refresh board

The schedule board refreshes automatically if there are changes in the start date, end date, resource assignment, or status of a booking. Automated refresh only considers changes to bookings in the current week.

Select **Refresh** to manually refresh the schedule board.

💡 Tip

Availabilities in the scheduling assistant don't refresh when the schedule board gets refreshed. Search for availabilities again or refresh the browser to have the latest updates on the schedule board reflected in the availabilities.

Focus mode

Focus on the details of the schedule board and hide all other navigation items.

Select the **Focus mode** icon to change to full screen mode.

Legend

View all color codes and icons for status, priority, timeline, and travel time. Select the ellipsis (...) > **Legend**.

Board view settings

Select the ellipsis (...) > **Scheduler settings** to open the board view settings. For more information about board view settings, see [Configure the schedule board tab settings](#).

Resource list

Right-click a resource's name and to show more options about the resource.

- Choose **View resource card** to see details like the resource's skills and roles. From here, you can also initiate a message, email, or phone call.
- Choose **Get driving directions** to get the driving directions for a work day.

Requirement pane

The requirement pane is where you find unscheduled requirements. Each column can be sorted and filtered by accessing a drop down menu next to each column header.

 **Note**

Filtering is not supported on the **Owner** column on the *Unscheduled Work Orders* tab

Select a single requirement from the requirement pane and select **Find availability** to launch the [schedule assistant](#).

The schedule assistant lists available and matching resources that you can book for the requirement.

Bookings on the timeline

You can move a booking to a resource on the current schedule board tab, or change the start date/time, or both

Right-click the booking on the schedule board and select **Move to**. Reassign the booking to any resource on the current schedule board tab, or change the start date and the start time of the booking. To assign the booking to a resource that doesn't show on this schedule board, select the filter icon in the resource field and change the filter from **Resources on this tab** to **All resources**. Select **Update** to apply the changes.

Create a new schedule board tab

To create a new schedule board tab, select **New schedule board tab (+)** in the tab list on the schedule board.

Enter the [relevant details about your new schedule board](#) and select **Add**.

Cached settings when loading the schedule board

To facilitate workflows, some parameters are cached so you can quickly continue where you left:

- Last accessed tab
- Map panel: Open or closed
- Viewtype: Gantt or list view
- Viewmode: Hourly/daily/weekly
- Board start date: Cached for 8 hours
- Column width: Zoom level

Automated scheduling with Resource Scheduling Optimization

The following features are only available for organizations using the [Resource Scheduling Optimization Add-in for Dynamics 365 Field Service](#).

The default optimization goal is the default for optimization requests. You can [change the optimization goal for each schedule board](#).

Get resource suggestions or book them directly

In the requirements pane, select one or more requirements.

The screenshot shows the Dynamics 365 Resource Scheduling interface. On the left, a sidebar lists resources: David Smith, Jim Glynn, Maria Campbell (selected), Nancy Anderson, Patrick Sands, Paul Cannon, Rene Valdes, and Robert Lyon. The main area is a calendar for Monday, 9/14/2020, showing tasks for Maria Campbell. Tasks include: 'Install Vacuum' (Requirement 3h 05m), 'Buy and Deliver Parts' (Requirement 1h 44m), 'Deliver Packages' (Requirement 1h 47m), 'Install Washer' (Requirement 2h), 'Fix Boiler' (Requirement 1h 26m), 'Install Mount' (Requirement 3h 22m), and 'Install Projector' (Requirement 3h 22m). A sidebar on the right shows tasks for other resources: 'Fix Washer' (Requirement 1h 03m), 'Fix Engine' (Requirement 1h 08m), 'Install Sink' (Requirement 2h 14m), and 'Preventative Maintenance' (Requirement 34m). At the bottom, there are buttons for 'Suggest resources (Preview)' and 'Book resources (Preview)'. A table titled 'Open Requirements' lists three items: 'New Lawn' (From Date 9/12/2020, To Date 9/14/2020, Duration 1 hr 59 mins, Proposed Duration 0 mins, Fulfilled Duration 0 mins, Remaining 1 hr 59 mins), 'Install Bookshelf' (From Date 9/12/2020, To Date 9/14/2020, Duration 3 hrs, Proposed Duration 0 mins, Fulfilled Duration 0 mins, Remaining 3 hrs), and 'Pick Up Trash' (From Date 9/12/2020, To Date 9/14/2020, Duration 1 hr 30 mins, Proposed Duration 0 mins, Fulfilled Duration 0 mins, Remaining 1 hr 30 mins). A 'RS' button is at the bottom left, and a page navigation bar at the bottom right shows '1 - 8 of 10'.

Name	From Date	To Date	Duration	Proposed Durati...	Fulfilled Duration	Remaining
New Lawn	9/12/2020	9/14/2020	1 hr 59 mins	0 mins	0 mins	1 hr 59 min
Install Bookshelf			3 hrs	0 mins	0 mins	3 hrs
Pick Up Trash			1 hr 30 mins	0 mins	0 mins	1 hr 30 min

Select **Suggest resources (Preview)** to get suggestions from Resource Scheduling Optimization about which resources to book.

Select **Book resources (Preview)** to let the system find the optimal resources and book directly.

Optimize the schedule of a single resource

After a resource's planned schedule has changed due to cancellations or emergency work, you can use Resource Scheduling Optimization for reoptimization. To optimize only a resource's schedule, right-click a resource on the schedule board and select **Optimize schedule**. For more information, see [Single resource optimization with Resource Scheduling Optimization](#).

Feedback

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Schedule board tab settings

Article • 05/28/2024

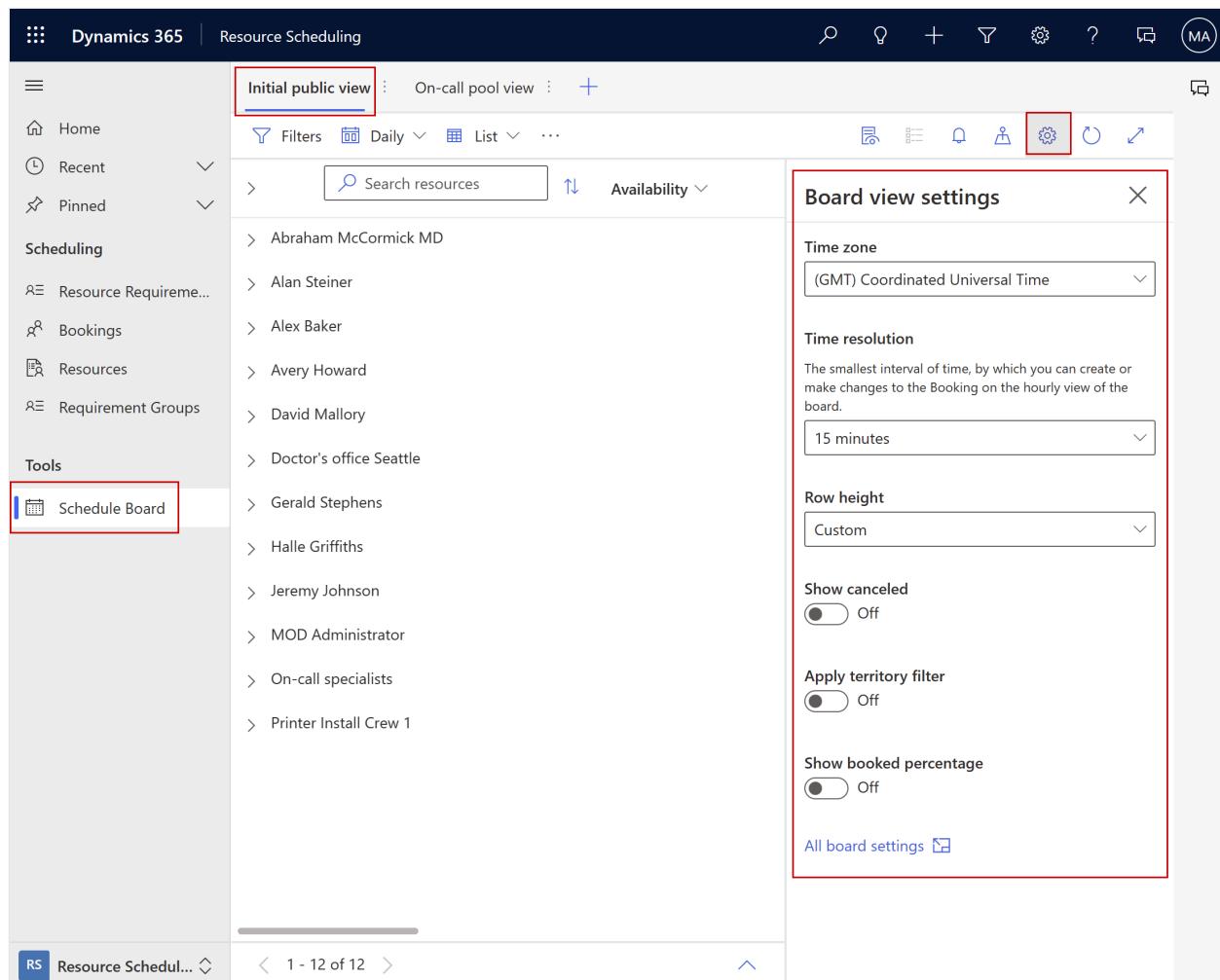
Schedule board settings in Universal Resource Scheduling let you define the layout and functions of schedule board tabs and the schedule board in general. By default, every user with out-of-box security roles can access the schedule board. Admins can [create custom security roles](#) with the *Schedule Board Setting* privilege to restrict access to certain roles.

There are two levels of settings for the schedule board. [Board view settings](#) mainly define the layout of a schedule board. [Board settings](#) contain more detailed settings and enable customizations.

Board view settings

The board view settings show in a side pane and apply only to the selected schedule board tab.

Open the **Schedule Board**, choose the tab to configure and select **Scheduler settings**.



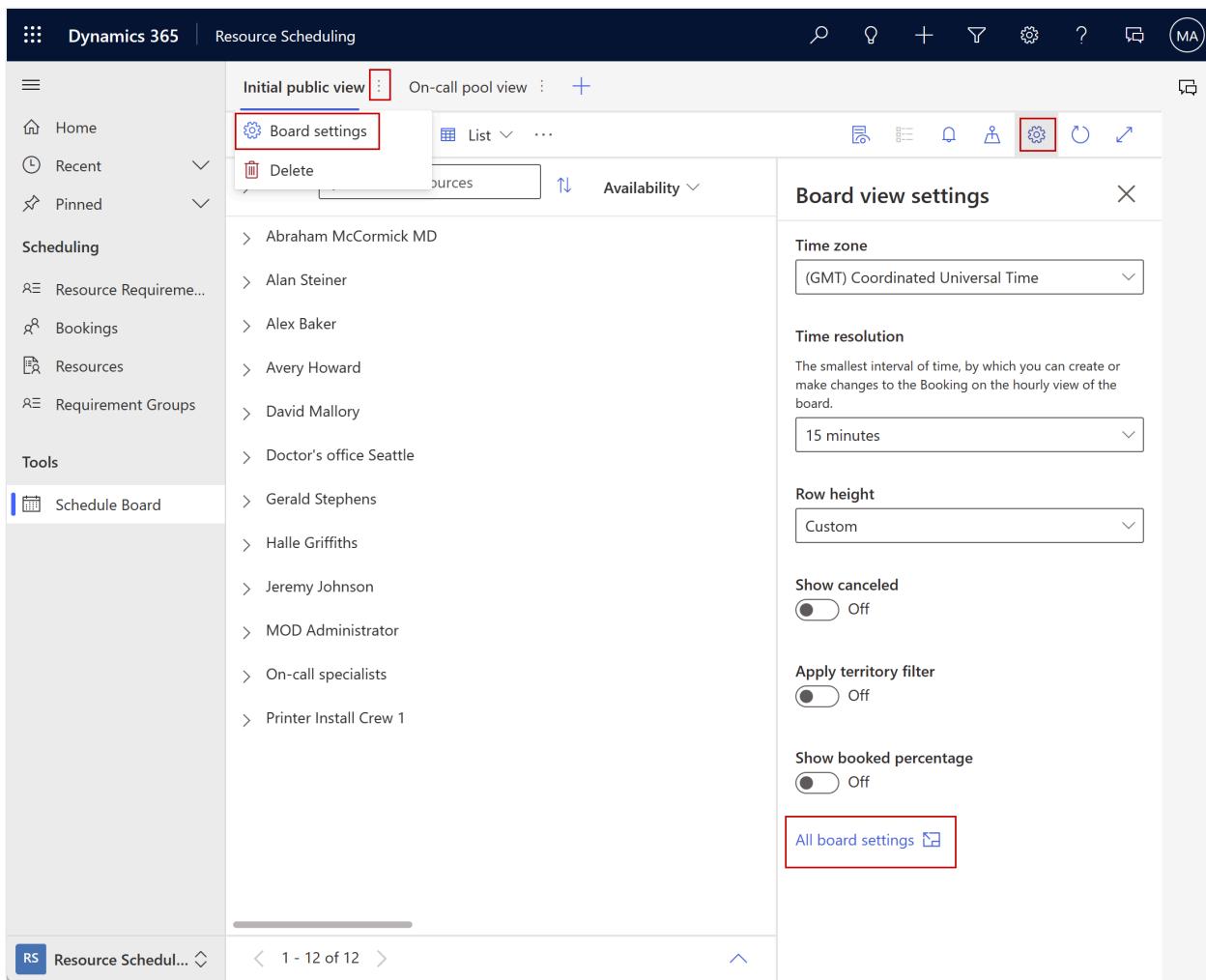
- **Time Zone:** Sets the time zone that the schedule board uses. The times for bookings in different time zones adapt to the selection.
- **Time resolution:** Time intervals for the hourly view.
- **Row height:** Defines the height of resource rows.
- **Optimization goal:** Applicable when using the [Resource Scheduling Optimization add-in for Dynamics 365 Field Service](#). Defines which [optimization goal](#) the system uses to recommend resources.
- **Show canceled:** Shows or hides canceled bookings.
- **Apply territory filter to requirements:** Defines whether the resource filter for [territory](#) also applies to requirements in the bottom pane.
- **Show booked percentage:** Shows or hides the percentage of total work time booked on the schedule board.
- **Show bookings proportional to duration:** Bookings on the daily, weekly, and monthly views show proportional to their duration instead of stacked.

[All board settings](#) opens the [board settings](#).

Board settings

Board settings are more detailed and let you define settings for a specific board tab and default settings that apply to all tabs. You can get to the board settings in two ways:

- Select the vertical ellipsis : next to the schedule board tab name and choose **Board settings**.
- Open the **Scheduler settings** and select **All board settings**.



Basic section

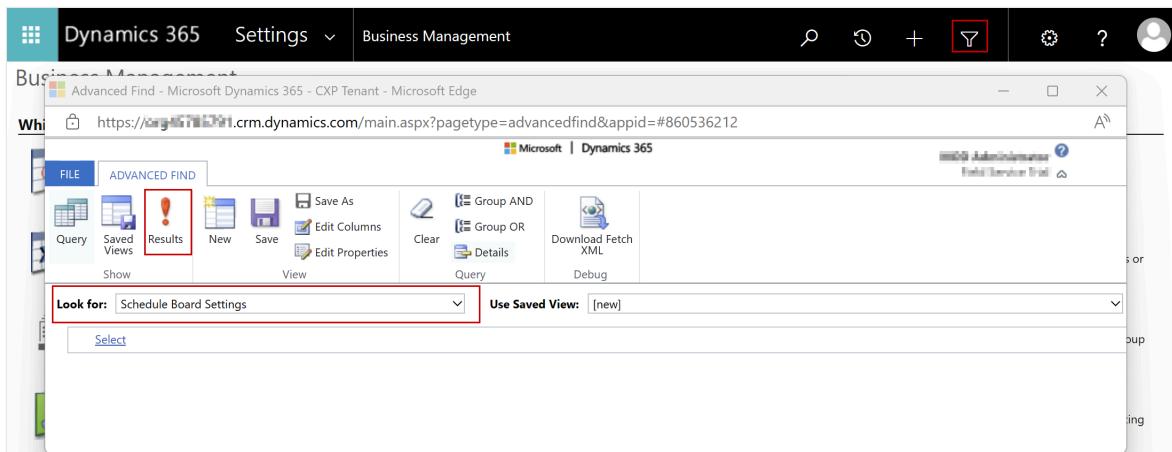
- **Name:** The name of the tab that shows on the schedule board.
- **Shared With:** Decides which users can view and edit the schedule board tab.
 - Everyone
 - Specific People: See [Share a schedule board tab with specific people](#)
 - Just Me
- **Edit defaults:** Lets you choose the default tab settings when new schedule boards are created. When values in a particular schedule board tab setting show < Default View >, it means the value is coming from the default tab settings.
- **Reset to Default:** Resets the current tab setting values to the values outlined in the default settings.

Share a schedule board tab with specific people

The schedule board saves tabs as records in the *Schedule Board Settings* entity.

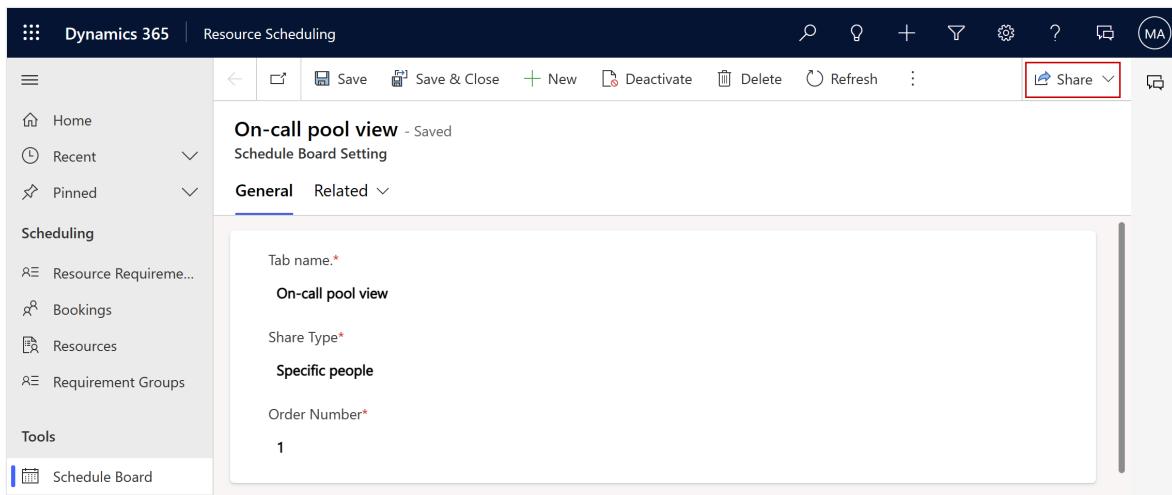
1. Go to **Settings > Advanced Settings** and select **Advanced Find**.

2. In the pop-up window, look for the **Schedule Board Settings** table and select **Results**.



The list of records shows all schedule board tab records you have access to.

3. Open the schedule board record you want to share to specific people. On the schedule board settings form, select **Share > Manage access**.



4. Add users or teams to share the schedule board with. They see the schedule board tab and can change it if they have access privileges to schedule boards.

Note

Managing schedule board access for teams by creating custom security roles and editing permissions is not supported. Instead, select **Specific People** as the sharing option and the appropriate team in the **Manage access** pane.

Map section

The **Map** section specifies views that pull details from a record when users select an icon on the map. Only public views are available for selection. Even though you can change

existing views, it's better to copy the default view and apply changes to the copy. Views related to resources are based on the *Bookable Resource* entity. Views related to organizational units are based on the *Organizational Unit* entity.

Resource tooltips view

This view defines the fields displayed in a tooltip that appears when you select a resource pin on the map.

Resource details view

This view defines the fields displayed in the details pane when selecting a resource pin on the map. The details pane opens when you select the **Details** icon on the schedule board.

Organizational unit tooltips view

This view defines the fields displayed in a tooltip that appears when an organizational unit map pin.

Organizational unit details view

This view defines the fields displayed in the details pane when selecting an organizational unit map pin. The details pane opens when you select the **Details** icon on the schedule board.

Requirement map filter view

This view defines the resource requirement records displayed on the map. The setting lists public views related to the resource requirement entity for selection. Resource requirements must have a latitude and longitude to display it on the map.

Custom web resource

[Web resources](#) are files that extend the Dynamics 365 application, such as HTML or JavaScript files. This section lets you access web resources from the schedule board, which can help dispatchers be more efficient and increase utilization.

- **Title:** the selected web resource shows in the actions area on the schedule board. A new tab with the provided title appears next to the maps icon.

- **Web Resource:** select a web resource from your Dynamics 365 organization.

Schedule assistant

The [schedule assistant](#) helps dispatchers assign requirements to ideal resources.

Search for

This setting decides the default value for the **Search For** field in the schedule assistant filter pane.

- Set to **All resources** to search for all applicable resources in the system that meet the schedule assistant filters for a requirement. For smaller organizations or organizations with less rigid resource and line of business divisions, we recommend the **All resources** setting that searches across all applicable resources across the entire organization.
- Set to **Resources visible on board** to search for resources that meet the schedule assistant filters for that requirement *and* meet the current schedule board resource filters. Users can change this value in the schedule assistant. For organizations that use multiple schedule boards to manage subsets of all resources, we recommend the **Resources visible on board** setting. It avoids scheduling requirements to resources that aren't part of a defined subset.

Unavailable resources

This setting determines how unavailable resources appear when users launch the schedule assistant from the **Find availability** button on the schedule board.

- **Unavailable resources do not appear** temporarily hides resources that don't match the schedule assistant filter criteria from the list of available resources.
- **Unavailable resources appear dimmed (when searching for resources visible on board)** ensures all resources that don't match the schedule assistant filter criteria still show on the schedule board, but appear dimmed. Open the schedule assistant and set the **Search For** filter to **Resources visible on board** to see the unavailable resources, which appear dimmed.

Book based on

This setting changes the schedule assistant visualization of the booking slot to make it easier to understand when travel time starts and when a resource is estimated to arrive.

- Set to **Start of Travel** to visualize the booking start as when travel begins.
- Set to **Estimated Arrival** to visualize the booking start as when the resource is estimated to arrive on site.

Colors

The colors selected in the schedule assistant section represent the resource availability in the schedule assistant. The schedule assistant determines availability by taking into account previously scheduled bookings and other factors including work hours, scheduled time off, vacations, holidays, and work closures. Additionally, a resource shows as unavailable in schedule assistant when the availability summary cell's dates fall outside of the requirement detail's from/to date ranges.

Icons

The icons show along with the colors to represent resource availability

Turn an icon off to hide it in the schedule assistant.

Makers can customize icons by [creating web resources](#) and select **Edit** in the icon setting to reference them.

Board colors

Board colors represent a resource's utilization on the schedule board. Most colors only apply to daily, weekly, and monthly views and on the currently selected schedule board. The hourly view shows bookings colored by their status. The color for non-working hours applies to the hourly view too.

Other settings

Requirement page count

Controls the maximum number of resource requirement records displayed on a single page in the lower pane of the schedule board.

Resource page count

Controls the maximum number of resource records displayed on a single page of the schedule board.

Number of days displayed in hours view

Number of days displayed on hourly view of the schedule board.

Number of weeks displayed in weeks view

Number of weeks displayed on the weekly view of the schedule board.

Number of days displayed in days view

Number of days displayed on the daily view of the schedule board.

Number of months displayed in months view

Number of days displayed on the monthly view of the schedule board.

Booking alerts template

This HTML snippet defines what shows in a [booking alert](#).

For reference, the default HTML is as follows:

```
HTML

<b class="bold">Subject: </b>
{msdyn_msdyn_bookingalert_msdyn_bookingalertstatus_BookingAlert.subject}<br />
<b class="bold">Due: </b>{msdyn_nexttimetoshow}<br />
<b class="bold">Description: </b><br />

{msdyn_msdyn_bookingalert_msdyn_bookingalertstatus_BookingAlert.description}
```

Disable default extensions

You can modify the CSS, add your own JavaScript files and localize the schedule board by changing labels on supported areas of the board. You can always exclude certain boards from inheriting client extensions applied to the default board by disabling default extensions on that board.

For more information about editing filter layouts, resource cell templates, and client extensions, see this [blog post](#) and [Extend Universal Resource Scheduling](#).

Filter Layout

Controls the fields displayed in the filter pane on the schedule board. These fields are used to filter which resources are displayed on the board.

Resource cell template

Controls the images, values, fields for resources on the schedule board.

Booking alerts view

Choose system view that can filter which booking alerts records show up in the alerts view of the details pane of the schedule board.

For example, when a business has booking alerts based on events related to work orders, projects, and cases. If a particular schedule board tab only deals with a certain type of requirements, a booking alert system view helps with filtering.

Retrieve resources query

View and edit XML that defines how resource records are fetched, filtered, and sorted when the schedule board loads. **Retrieve Resources Query** uses filter layout and resource cell templates to perform filtering and sorting in the background.

Schedule types

The following settings are dependent on the entity being scheduled. Though requirement records are always scheduled, the requirement can be related to work orders, cases, custom entities, or no entity at all. Select **None** to edit default settings that apply to all boards and the settings for when a requirement is scheduled by itself. To override defaults for a schedule board, [select a schedulable entity](#) to change its settings.

Booking tooltips view

Select the system view that dictates the fields displayed when hovering your mouse over a booking. This setting only affects the hourly view of the schedule board.

Requirement details view

Select the system view that dictates the fields displayed in the details pane when a requirement is selected in the lower pane of the schedule board.

Booking details view

Select the system view that dictates the fields displayed in the details pane when a booking is selected. This setting only affects the hourly view of the schedule board.

Requirement map pin tooltips view

Select the system view that dictates the fields displayed when hovering your cursor over a requirement map pin.

Schedule assistant requirement view

Select the system view that dictates the fields displayed in the lower pane when the schedule assistant is triggered for an individual requirement from the schedule board.

Custom booking template

HTML and CSS that controls the fields inside a booking time slot on the schedule board. This setting only affects the hourly view of the schedule board.

For more information, see [Edit the schedule board booking template](#).

Requirement Panels

Use this section to configure requirement views at the bottom of the schedule board. You can change the order in which they appear on the schedule board.

There are default requirement views automatically available. Turn off **Hide default requirement panels** to remove them. Use the **Apply territory filter to requirements** setting to filter requirements in addition to resources with an active a territory filter on the schedule board.

Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

Create a booking alert

Article • 11/27/2024

Dispatchers need to be aware of important updates and status changes to ensure accurate schedules and timely job completion. Beyond scheduling, dispatchers might need to ensure billing and customer satisfaction concerns are handled.

Booking alerts bring attention to important notifications so that dispatchers can schedule with confidence. Booking alerts display notes and reminders on the schedule board, and can relate to bookings, work orders, users, and other entities. They can be triggered based on timers, set alarms, or workflows.

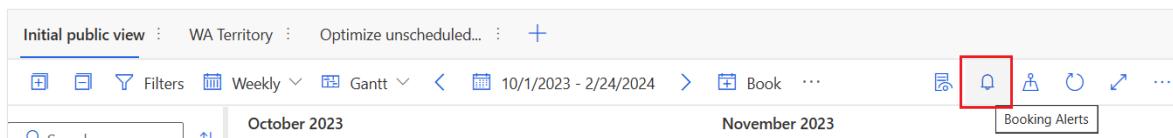
Create a booking alert

Booking alerts are often created through automation - either a flow, plugin or through an integration with an external system. They can also be manually created from the schedule board.

1. Open the schedule board, select the **Booking Alerts** icon and select **New Booking Alert**.
2. On the **Booking Alert** form, enter **Subject** and **Description** to define the message that appears on the alert.
3. Set the **Due Date** for when the alert shows.
4. Choose a related record in the **Regarding** field to show the alert in the related record's timeline.
5. Choose at least one system user in the **Assignees** field. Each assignee can choose to snooze or dismiss the alert individually.
6. Select **Save & Close**.

You can edit the fields inside a booking alert by editing the **Booking Alert Template** in the schedule board tab settings. For more information, see [schedule board tab settings](#).

View the booking alert



When the due date is reached, the alert appears on the **Booking Alerts** side pane on the schedule board. Assignees can view or snooze the active alert. Assignees can set the snooze time. Assignees can dismiss all alerts.

Alerts for **Bookable Resource Bookings** also show in the schedule board alongside a booking time slot.

When you create a booking alert, the system automatically creates one *Booking Alert Status* record for every assignee so every user can snooze or dismiss alerts individually. When deleting records, keep the relationship *Booking > Booking Alert > Booking Alert Status* in mind.

Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback ↗](#)

Resource utilization metrics on the schedule board

Article • 11/26/2024

Dispatchers and service managers can use the resource utilization metric to make informed scheduling decisions.

Utilization is the amount of time a dispatcher schedules a resource to work. The metric is the percentage of booked time versus working hours. On the schedule board, resource utilization shows next to a resource's name.

Calculate resource utilization

Note

Resource capacity and requirement effort are not considered in utilization calculations.

Utilization percentage derives from **Total Booked Hours** divided by **Total Working Hours** in the selected date range.

Formula: $((\text{Total booked hours in date range}) / (\text{Total working hours} \times \text{days in date range})) \times 100$

- **Total Booked Hours** is the sum of the hours booked to the resource for bookings in a *Committed* status.
- **Total Working Hours** is the sum of the resource's working hours. A setting on the *Bookable Resource* record defines the working hours. For more information, see [Set up bookable resources](#).

Example

A resource works an eight-hour shift, Monday to Friday. The date range on the schedule board shows a seven-day week, Monday to Sunday.

Total working hours are 40 hours (5×8 hours).

If the dispatcher books the resource for 10 hours throughout the work week, their total working hours are 10.

So the resource has a utilization of 25% ($(10 / (5 \times 8)) \times 100$)).

Booking status influence on utilization

Your [business processes](#) can use several booking statuses, such as traveling, in progress, on break, and completed. Each of them maps to a booking status of either *Committed*, *Proposed*, or *Canceled*. Bookings map to the *Committed* status when confirmed and a resource completes the work. The *Proposed* status suggests unconfirmed work. The *Canceled* status notifies stakeholders that the booking is no longer scheduled.

The utilization metric ignores bookings with a *Proposed* or *Canceled* booking status.

Next steps

- [Resource and utilization report](#)
-

Feedback

Was this page helpful?

 Yes

 No

[Provide product feedback](#) 

Customize the schedule board with a custom resource attribute

Article • 05/22/2024

The schedule board can be customized and extended to meet business needs. For example, resource information, fields in the filter pane, or sort options.

Consider the following customization scenario:

Each bookable resource has a cost based on factors like seniority and certification level. Dispatchers would like to see the general cost of their resources, along with the ability to filter and sort by cost. Rather than use an exact resource cost, this scenario uses a relative cost score from 1 (lowest resource cost) to 10 (highest resource cost). We use the scope in the resource cell, the filter panel, and in the sort options.

Step 1: Add the new attribute to the bookable resource entity

Go to **Customizations > Customize the System > Bookable Resource > Fields** and add a new field named **Resource Cost** with the schema name `tsp_resourc cost`.

Use the data type **Option Set** and select the existing option set **Level of Importance** to use a list of values from 1 to 10.

Add the newly created field to the form before you **Publish** the changes.

Step 2: Create or update a schedule board

Go to the schedule board that you want to add the new resource cost attribute to.

Step 3: Modify the resource cell template

The resource cost indicator should be displayed in the resource cell template. [Font Awesome](#) can be used to display icons, such as €, \$, £.

The HTML first draws five gray icons as a background, and then yellow icons as foreground. The number of the foreground icons is mapped to the value of the resource cost. For example, a resource cost value of 2 is 20%, so only one of the five yellow Euro icons show.

Open the schedule board settings, under **Other**, create a custom **Resource cell template**.

Board settings: Initial public view

Basic: 14 | 12

Map

Custom web resource

Schedule assistant

Board colors

Other

Booking alerts template: Given a booking alert is shown in the alerts pane, the HTML entered here dictates the fields in the alert box. Off

Disable default extensions: Exclude certain boards from inheriting client extensions applied to the default board by disabling default extensions on that board. Off

Filter layout: This controls the fields displayed in the filter pane of the schedule board. These fields are used to filter which resources are displayed on the board.

Default Filter Layout (Default) | + - *edit*

Resource cell template: This controls the images, values, fields displayed in the box that holds the resource's name and utilization on the schedule board.

Default Resource Cell Template (Default) | + - *edit*

Booking alerts view: This is a system view that can filter which booking alerts records are eligible to show up in the alerts view in the details panel of the schedule board.

Active Booking Alert Statuses (Default) | + - *edit*

Retrieve resource query: Retrieve Resources Query can use filter layout and resource cell templates to perform filtering and sorting in the background.

Default Retrieve Resources Query (Default) | + - *edit*

Reset to default | Edit defaults | Save | Cancel

Insert the following code snippet into the custom resource cell template. Change the symbol by replacing `fa-euro`.

HTML

```

<div class='resource-card-wrapper {{iif ResourceCellSelected "resource-cell-selected" ""}} {{iif ResourceUnavailable "resource-unavailable" ""}} {{iif IsMatchingAvailability "availability-match" ""}}>
    {{#if imagepath}}
        <img class='resource-image' src='{{client-url}}{{imagepath}}' />
    {{else}}
        <div class='resource-image unknown-resource'></div>
    {{/if}}
    <div class='resource-info'>
        <div class='resource-name primary-text ellipsis' title='{{name}}'>
            {{name}}
        </div>
        <div class='secondary-text ellipsis'>
            <div class="back-stars" style="color: #EEEEEE; position: relative; display: inline-block;">
                <i class="fa fa-euro" aria-hidden="true"></i>
                <i class="fa fa-euro" aria-hidden="true"></i>
                <i class="fa fa-euro" aria-hidden="true"></i>
                <i class="fa fa-euro" aria-hidden="true"></i>
                <i class="fa fa-euro" aria-hidden="true"></i>
            </div>
        </div>
        <div class="resourcecost" style="width: {{resourcecost}}%; color: #FFBC0B; position: absolute; top: 0; left:0; display: inline-block; overflow: hidden;">
            <i class="fa fa-euro" aria-hidden="true"></i>
            <i class="fa fa-euro" aria-hidden="true"></i>
        </div>
    </div>
</div>

```

```

                <i class="fa fa-euro" aria-hidden="true"></i>
                <i class="fa fa-euro" aria-hidden="true"></i>
                <i class="fa fa-euro" aria-hidden="true"></i>
            </div>
        </div>
    </div>

    <div class='secondary-text ellipsis'>
        {{#if (eq (is-sa-grid-view) false) }}
            <div class='booked-duration'>{{BookedDuration}}<div class='fo-
sch-clock'></div></div>
            <div class='booked-percentage'>{{BookedPercentage}}%</div>
        {{/if}}
        </div>
        {{#if (eq (is-sa-grid-view) false) }}
            <div class='matching-indicator'></div>
        {{/if}}
    </div>
    {{#if (eq (is-sa-grid-view) false) }}
        {{> resource-map-pin-template this }}
    {{/if}}
</div>

```

ⓘ Note

Javascript is not supported in the resource cell template.

Step 4: Modify the filter layout

In this step, we define a maximum cost score when filtering and searching for resources and sorting by cost score.

On the schedule board tab settings, go to **Filter layout** and create a custom template.

Insert the following code snippet into the custom filter layout template.

XML

```

<?xml version="1.0" encoding="utf-8" ?>
<filter>
    <controls>
        <control type="characteristic" key="Characteristics" label-
id="ScheduleAssistant.West.Skills" />

        <control type="combo" source="optionset" key="ResourceCost" label-
id="Resource Cost Limit" entity="bookableresource"
attribute="tsp_resourcecost" multi="false">
        </control>
    </controls>
</filter>

```

```

        <control type="combo" source="entity" key="Roles" inactive-state="1"
label-id="ScheduleAssistant.West.Roles" entity="bookableresourcecategory"
multi="true" />
        <control type="combo" source="entity" key="Territories" unspecified-
key="UnspecifiedTerritory" label-id="ScheduleAssistant.West.Territories"
entity="territory" multi="true" />
        <control type="combo" source="entity" key="OrganizationalUnits" label-
id="SB_FilterPanel_OrganizationalUnitsFilter_Title" inactive-state="1"
entity="msdyn_organizationalunit" multi="true" />
        <control type="combo" source="optionset" key="ResourceTypes" label-
id="SB_FilterPanel_ResourceTypesFilter_Title" entity="bookableresource"
attribute="resourcetype" multi="true">
            <data>
                <value id="2" />
                <value id="3" />
                <value id="4" />
                <value id="5" />
            </data>
        </control>
        <control type="combo" source="entity" key="Teams" label-
id="SB_FilterPanel_TeamsFilter_Title" entity="team" multi="true" />
        <control type="combo" source="entity" key="BusinessUnits" label-
id="SB_FilterPanel_BusinessUnitsFilter_Title" entity="businessunit"
multi="true" />
        <control type="order" key="Orders" label-id="FilterControl_OrderLabel">
            <order name="name" entity="bookableresource" attribute="name" />

            <order name="resourcecost" entity="bookableresource"
attribute="tsp_resourcecost" />

            <order name="proficiencyscore" entity="bookableresourcecharacteristic"
attribute="ratingvalue" />
        </control>
    </controls>
</filter>

```

Step 5: Modify the query

Finally, we modify the actual query and include the new filter. In the schedule tab settings, go to **Retrieve resource query**, edit the default query, and copy the entire code. Then, create a custom template and paste the default code. The default code is lengthy. The following are only the code snippets to paste within an existing resource query.

After `<entity name="bookableresource">`, insert `<attribute name="tsp_resourcecost" alias="resourcecost" groupby="true"/>`

After `the last </filter> tag of the <!-- Territory filter -->`, insert the following code snippet:

```

<filter type="or" ufx:if="$input/ResourceCost">
  <condition attribute="tsp_resourcecost" operator="le">
    <ufx:value select="$input/ResourceCost" attribute="value" />
  </condition>
</filter>

```

← New retrieve resources query X

Custom resource cost query *

```

<!-- Territory filter -->
<filter type="or">
  <condition ufx:if="$input/UnspecifiedTerritory. = 'true'" entityname="territory" attribute="msdyn_territory" operator="null" />
  <condition ufx:if="$input/Territories/bag" entityname="territory" attribute="msdyn_territory" operator="in">
    <ufx:apply select="$input/Territories/bag">
      <value>
        <ufx:value select="@ufx-id" />
      </value>
    </ufx:apply>
  </condition>
</filter>

<filter type="or" ufx:if="$input/ResourceCost">
  <condition attribute="tsp_resourcecost" operator="le">
    <ufx:value select="$input/ResourceCost" attribute="value" />
  </condition>
</filter>

<filter type="and">
  <condition attribute="statecode" operator="eq" value="0" />
  <!-- Must choose from resource filter -->
  <condition ufx:if="$input/MustChooseFromResources/bag" attribute="bookableresourceid" operator="in">

```

Save
Save as new
Cancel

Step 6: Test your new schedule board

On the schedule board, we defined a maximum cost factor of 5 and an ascending sort order based on cost.

Next steps

- Overview of scheduling extensibility

Feedback

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Edit schedule board booking templates

Article • 11/26/2024

When a requirement is scheduled to a resource, the system creates a booking record. The schedule board displays bookings grouped by resources. The fields displayed in the schedule board booking are called a *Booking Template*, which you can customize with fields from system entities.

Edit work order booking template

Each scheduling-enabled entity can have a different booking template. When a work order requirement is scheduled, the booking template shows the *Bookable Resource Booking* record's **Name** and **Duration** values.

The default value is the following code snippet:

HTML

```
<div>{SchedulableEntityDisplayName} - {name}<br />Duration: <strong  
class="bold">{duration}</strong></div>
```

To edit the HTML that controls the booking template:

1. [Open the schedule board settings](#).
2. Select **Schedule Types** and select the entity for which you want to change the booking template.
 - If you open the settings from a schedule board tab, you change the settings for that tab only.
 - To make changes to all tabs, select **Edit defaults** and apply your changes there.
3. Set the **Custom booking template** to **On** and change the HTML code.
4. In the **Booking Template** field, override the booking template by entering HTML and CSS that can reference fields from the *Bookable Resource Booking* entity and linked entities.
5. Test customized booking templates on multiple browsers and consider best practices for accessibility. JavaScript isn't supported in the booking template.

💡 Tip

Use system entities only. Pulling values from custom entities isn't supported.

Fields from the *Bookable Resource Booking* entity can be referenced directly using the field name in curly brackets. Example: `{duration}`.

To display a field from a linked entity, find the name of the N:1 relationship and add a period (.) followed by the field name of the target entity. For example, the work order relationship path is

`msdyn_msdyn_workorder_bookableresourcebooking_WorkOrder` and the primary incident type field is `msdyn_primaryincidenttype`. This results in field reference `{msdyn_msdyn_workorder_bookableresourcebooking_WorkOrder.msdyn_primaryincidenttype}`. Add more relationship hops by connecting them with an additional period.

Custom templates only apply to tooltips on the schedule board's hourly view and won't impact daily, weekly, or monthly views.

Custom booking template example

This example shows a custom booking template for the work order entity. The following code snippet pulls values from the work order that relate to the booking.

HTML

```
<div style="line-height: 11px !important; width: 99%; overflow: hidden; display: block; text-overflow: ellipsis;">
    WO: <b>{msdyn_msdyn_workorder_bookableresourcebooking_WorkOrder.msdyn_name}</b><br/>
    Account: <b>{msdyn_msdyn_workorder_bookableresourcebooking_WorkOrder.msdyn_account_msdyn_workorder_ServiceAccount.name}</b><br/>
    Incident: <b>{msdyn_msdyn_workorder_bookableresourcebooking_WorkOrder.msdyn_primaryincidenttype}</b><br/>
    Duration: <b>{duration} minutes</b><br/>
</div>
```

ⓘ Note

Referencing appointment attributes in the schedule board booking template isn't supported because appointment template data is dependent on having an

associated booking.

To reference these attributes, ensure that appointments have bookings associated with them, and then disable the **Include Appointments** setting from the **Scheduling Parameters**. Disabling this setting hides all appointments which don't have a bookable resource bookings linked to them on the schedule board.

Advanced booking template styling using CSS

You can add styles to the custom booking template with CSS. Go to **Resource Scheduling > Administration > Scheduling Parameters** and set **Disable Sanitizing HTML Templates** to **Yes** to include CSS statements into the booking templates.

In this example, we extend the example of the custom booking template from the previous section. Use CSS to add customer ratings and service icons based on conditional values in the account and work order records. A customization added a field *new_customerrating* on the *account* entity and propagates that field to the work order entity with an integer range from 1 to 10. We want the booking template to visualize the customer rating with grey stars. To represent the actual customer rating, we also add five orange stars, but only show a percentage of these stars, corresponding to the 1-10 customer rating.

We also want our dispatcher to see whether a work order is a service call or another type of job. The custom field *new_isservicecall* on the *work order* entity, has two possible values: 0 or 1. Using the same approach as before, we first draw a gray wrench as background, overlay an orange wrench and limit its size to 0% (*new_isservicecall* = 0) or 100% (*new_isservicecall* = 1).

Add the following HTML and CSS text to **Booking Template** field in **Schedule Board Tab Settings**.

HTML

```
<div style="line-height: 11px !important; width: 99%; overflow: hidden; display: block; text-overflow: ellipsis;">
<div class="back-stars" style="color: #AAAAAA; position: relative; display:inline-block;">
  <i class="fa fa-star" aria-hidden="true"></i>
  <i class="fa fa-star" aria-hidden="true"></i>
  <i class="fa fa-star" aria-hidden="true"></i>
  <i class="fa fa-star" aria-hidden="true"></i>
  <i class="fa fa-star" aria-hidden="true"></i>
<div class="customerrating" style="width: {msdyn_msdyn_workorder_bookableresourcebooking_WorkOrder.msdyn_account_msdyn_workorder_ServiceAccount.new_customerrating}0%; color: #FFBC0B; position:
```

```

        absolute; top: 0; left:0; overflow: hidden; display:-webkit-box">
        <i class="fa fa-star" aria-hidden="true"></i>
        <i class="fa fa-star" aria-hidden="true"></i>
        <i class="fa fa-star" aria-hidden="true"></i>
        <i class="fa fa-star" aria-hidden="true"></i>
        <i class="fa fa-star" aria-hidden="true"></i>
    </div>
</div>
<div class="repair-back" style="color: #AAAAAA; position: relative;
display:inline-block; padding-left:10px; vertical-align:text-top;">
    <i class="fa fa-wrench" aria-hidden="true"></i>
<div class="repair" style="width:
{msdyn_msdyn_workorder_bookableresourcebooking_WorkOrder.new_isservicecall}0
%; color: #FFBC0B; position: absolute; top: 0; left:0; padding-left:10px;
overflow: hidden; display:-webkit-box">
    <i class="fa fa-wrench" aria-hidden="true"></i>
</div>
</div>
<br/>
WO:
<b>{msdyn_msdyn_workorder_bookableresourcebooking_WorkOrder.msdyn_name}</b>
<br/>
Account: <b>
{msdyn_msdyn_workorder_bookableresourcebooking_WorkOrder.msdyn_account_msdyn
_workorder_ServiceAccount.name}</b><br/>
Incident: <b>
{msdyn_msdyn_workorder_bookableresourcebooking_WorkOrder.msdyn_primaryincide
nttype}</b><br/>
Duration: <b>{duration} minutes</b><br/>
</div>

```

The booking template on the schedule board now contains a visual representation of the customer rating and the type of job.

Next steps

- Schedule board tab settings in Dynamics 365 Field Service
- Customize the schedule board with a custom resource attribute

Feedback

Was this page helpful?

 Yes

 No

Provide product feedback 

Show account names on booking template

Article • 01/26/2024

The schedule board supports directly displaying the service account field of parent schedulable entity when viewing booking details on an aggregated view such as daily, weekly, or monthly. When enabled, this app setting respects security settings such as field security on the account-related fields.

This feature is controlled by the *msdyn_EnableInterdayAccountName* global setting. You can enable it with a toggle on the Scheduling Parameters form or by using browser console commands.

Enable or disable account names on interday booking details with browser console commands

1. Open the schedule board in the browser.
2. Launch the developer tools of your browser and open the console.
3. Run the following script to enable the setting. To disable it change the boolean value to `false`.

```
Xrm.Utility.getGlobalContext().saveSettingValue("msdyn_EnableInterdayAccountName",true)  
Xrm.Utility.getGlobalContext().getCurrentAppSettings();
```

4. Refresh your browser after running the script.

Next steps

- [Schedule board tab settings in Dynamics 365 Field Service](#)
- [Customize the schedule board with a custom resource attribute](#)

Feedback

Was this page helpful?

 Yes

 No

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Schedule assistant overview

Article • 05/22/2024

The schedule assistant helps dispatchers assign requirements to ideal resources.

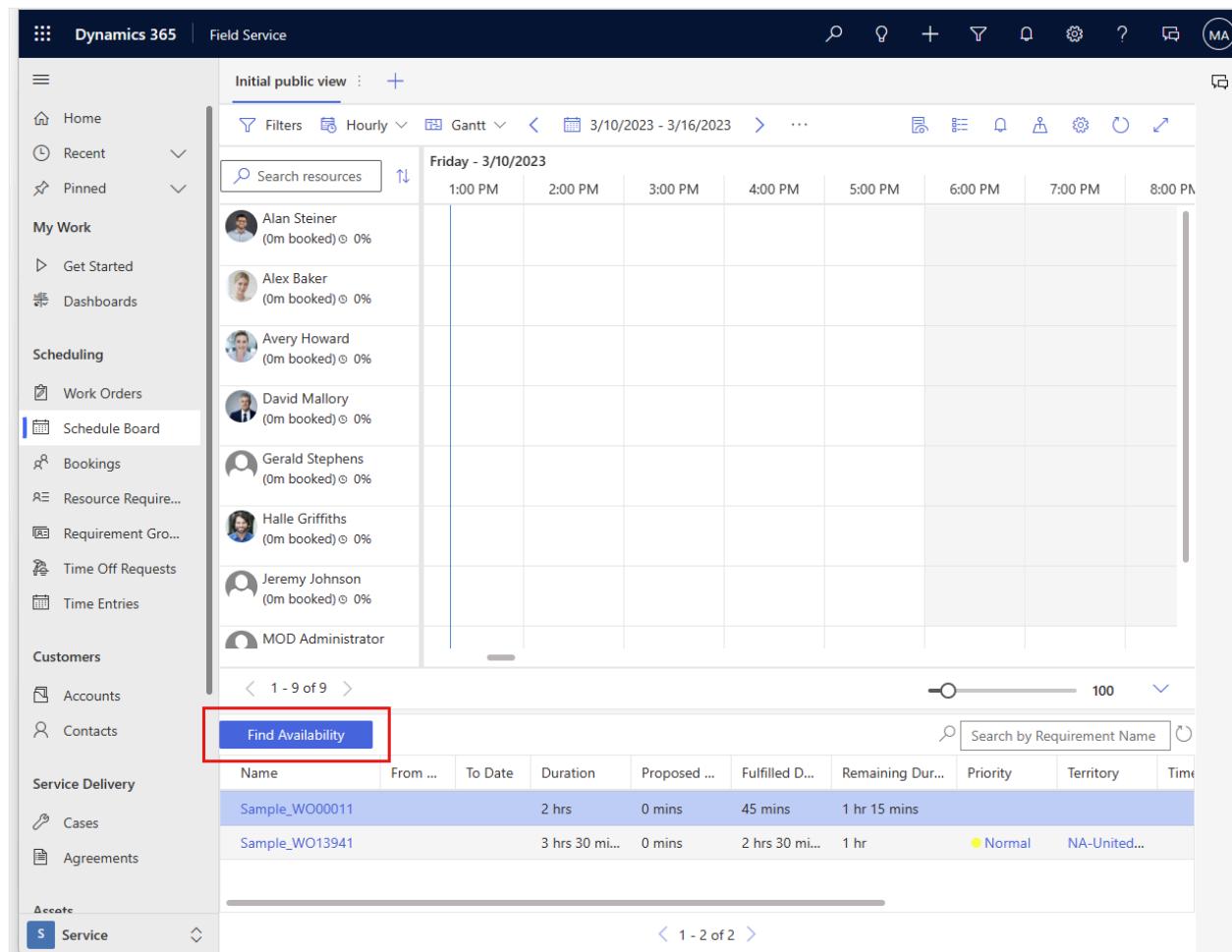
It recommends resources that match criteria, like availability or skills, for requirements. The system also estimates travel time for the recommended resources, which helps dispatchers plan work accordingly.

When the dispatcher identifies the right resource for the job, they book the resource.

Launch the schedule assistant

If a requirement is ready for scheduling, you can launch the schedule assistant from various areas.

- Directly from the schedule board: Open the requirements pane, choose a requirement, and select **Find availability**.



The screenshot shows the Dynamics 365 Field Service application interface. The left sidebar contains navigation links for Home, Recent, Pinned, My Work, Get Started, Dashboards, Scheduling, Work Orders, and Schedule Board. The Schedule Board is currently selected. The main area displays a grid of resources with their availability status. A red box highlights the 'Find Availability' button in the requirements pane at the bottom of the screen. The requirements pane also includes a search bar for 'Search by Requirement Name' and a table with columns for Name, From ..., To Date, Duration, Proposed ..., Fulfilled D..., Remaining Dur..., Priority, Territory, and Time.

Name	From ...	To Date	Duration	Proposed ...	Fulfilled D...	Remaining Dur...	Priority	Territory	Time
Sample_WO00011			2 hrs	0 mins	45 mins	1 hr 15 mins			
Sample_WO13941			3 hrs 30 mi...	0 mins	2 hrs 30 mi...	1 hr	Normal	NA-United...	

Select the **Book** option:

- On the record form of a [scheduling-enabled entity](#). Schedule assistant uses that entity's associated time zone. You can view or change the time zone by opening the entity and selecting **Modify Calendar** in the command bar.
- On the *resource requirement* form.
- On the [requirement group](#) form.
- From list view of a [scheduling-enabled entity](#), after selecting a record.

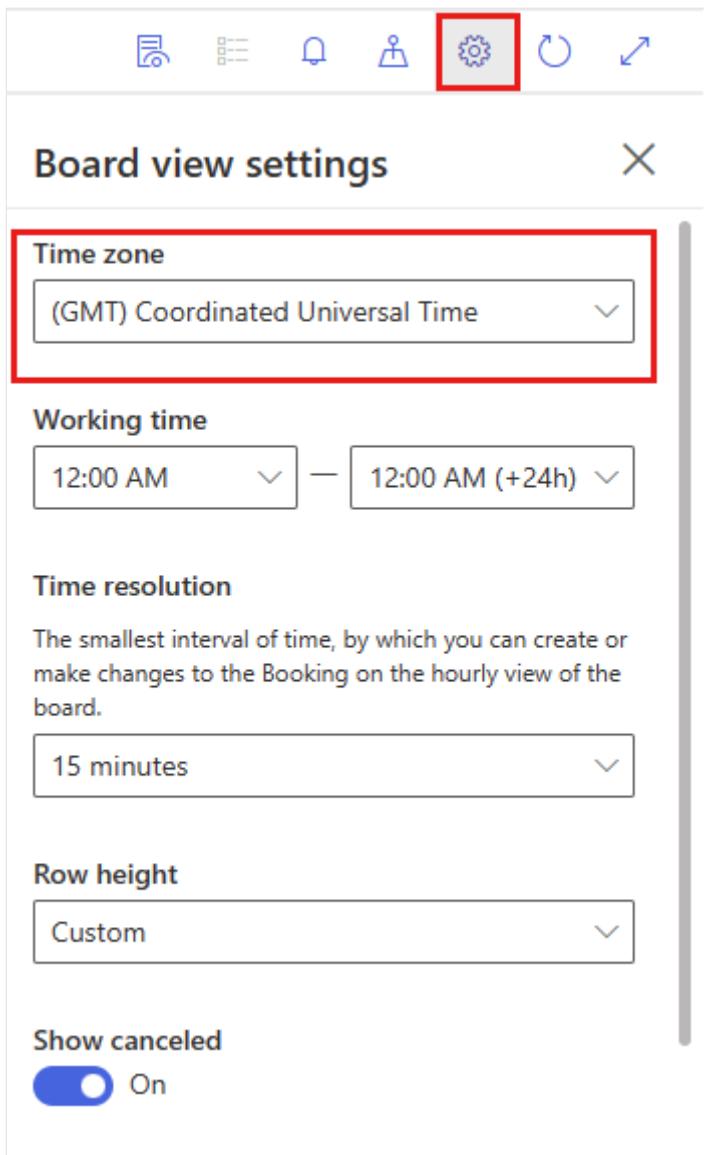
Schedule assistant filters

After launching the schedule assistant, it populates filters based on criteria like work location, characteristics, territory, resource types, and more. Dispatchers can refine results by adjusting filters to meet their scheduling needs and find the right resource.

The maximum search resource availability limit is 1,000 entries. For organizations with a large number of resources, search might be incomplete. You can customize the *Resource Availability Retrieval Limit* of *Booking Setup Metadata* to increase the limit. However, it can decrease the search performance.

Time zone for schedule assistant search results

View and change the time zone in the **Board view settings** after launching the schedule assistant.



Board view settings

Time zone

(GMT) Coordinated Universal Time

Working time

12:00 AM — 12:00 AM (+24h)

Time resolution

15 minutes

Row height

Custom

Show canceled

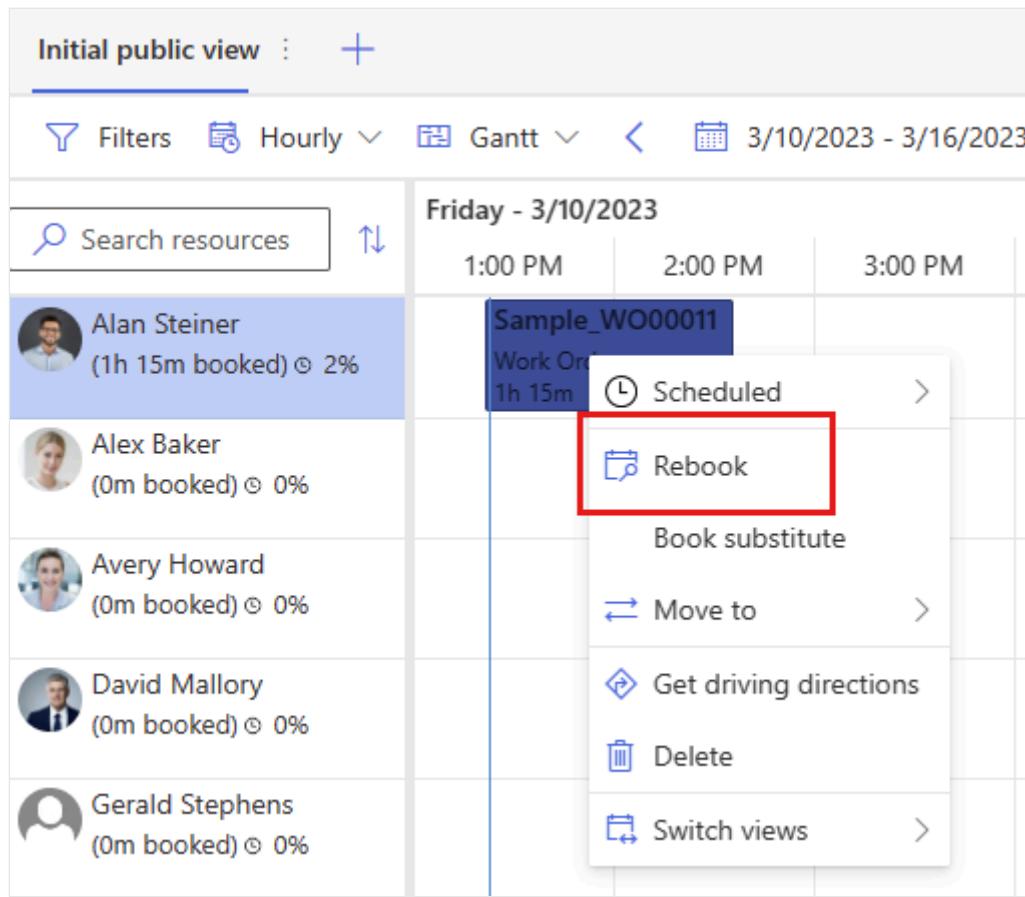
On

The system derives time zone value from the time zone on the requirement. Open the requirement and select **Modify Calendar** to view and edit the requirement time zone.

Reschedule bookings

To rebook requirements, you have several options.

- On the schedule board, right-click a booking and select **Rebook**.



The screenshot shows a Gantt chart for Friday, 3/10/2023. A work order named "Sample_WO00011" is selected. A context menu is open, with the "Rebook" option highlighted by a red box. Other options in the menu include "Scheduled", "Book substitute", "Move to", "Get driving directions", "Delete", and "Switch views".

Select the **Rebook** option after selecting a record.

Book the same work order again

You can also schedule the same job to multiple resources with the schedule assistant.

Trigger the schedule assistant for a given work order and book it to a resource's time slot; however, before exiting the search, select another resource's time slot and select **Book again**.

Next steps

- [Schedule with travel time and distance](#)
- [Schedule within time constraints](#)
- [Schedule work over multiple days](#)

Feedback

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Schedule requirements with travel time and distance

Article • 05/22/2024

Field service organizations often send technicians to various customer sites. Optimizing routes and minimizing travel time saves valuable resources. Dynamics 365 Field Service calculates the driving time and distance as technicians travel.

Prerequisites

- [Enable location and map settings in Dynamics 365 Field Service](#).
- [Turn on auto geocoding to calculate estimated travel time](#). If enabled, the system takes the current location of a technician from the [location of the mobile device](#).
- Ensure you [configured resources](#) with start and end locations.

Note

Travel time is only calculated when all of the following criteria are met:

- Requirement is on site.
- Booking falls within the resource's working hours.
- If it's the first booking of the day, the resource is on site and has a valid location.
- If it's not the first booking of the day, the preceding booking is on site and has a valid location OR the resource is on site and has a valid location.

Travel time and routes only supports driving and no other means of transport.

Visualize travel time on the schedule board

When a dispatcher schedules a requirement to a resource, the booking appears on the schedule board, including the travel time.

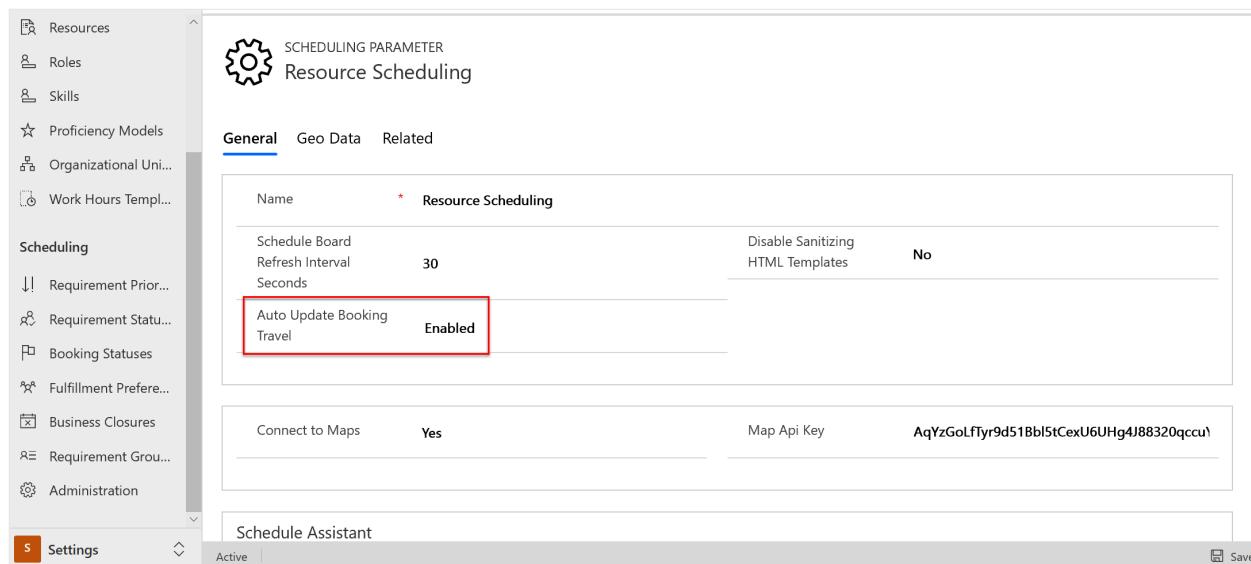
While technicians drive to the customer location, the system updates the booking status to indicate they're traveling. It tracks the actual travel duration for invoicing based on that status. Upon arrival, they update the booking status to indicate work started. The

system tracks the duration in this status and updates the booking when the technician completes the work.

Add travel time with manual scheduling

By default, manually scheduling a requirement by dragging and dropping on the schedule board doesn't calculate travel time and distance.

To enable the travel time calculation for manually scheduled requirements, go to **Resource Scheduling > Settings > Administration > Scheduling Parameters** and set **Auto Update Booking Travel** to **Enabled**. The system adds auto-updated travel time before the actual booking start time if it knows a start and end location.



💡 Tip

In some scenarios, technicians create bookings on the mobile app. To auto-calculate the travel time and distance, set the *msdyn_ursinternalflags* field on the booking form to `{"AutoUpdateBookingTravel":true}`.

❗ Note

When you add and reorder subsequent bookings on the schedule board, only travel time gets updated. The start time of a booking won't change automatically. To ensure that the remaining bookings cascade, correct overlapping times, and fit inside working hours after changes, organizations should consider using the [Resource Schedule Optimization add-in](#).

Add travel time with schedule assistant

The schedule assistant is designed to help dispatchers make better scheduling decisions based on travel times and distances. When you book a requirement with the schedule assistant, the system considers travel time.

ⓘ Note

If the work order requirement is location agnostic, resources without locations also show in the results and the booking will not calculate travel time.

Consider traffic when scheduling

To help with scheduling decisions, show the current traffic patterns on the schedule board map. Open the **View settings** on the map and select **Traffic**.

ⓘ Note

Travel time calculations don't take traffic patterns or historical travel times into account.

Scheduling based on real-time traffic isn't applicable because most organizations schedule days or weeks in advance, and you can't predict real-time traffic ahead of time.

Predictive travel times with historical traffic information

The Resource Scheduling Optimization add-in takes [historical traffic information into account to better plan for travel times](#).

Estimated travel time and booking fulfilled duration

in the **Fulfilled Duration** field on a scheduled requirement, the estimated travel time is automatically deducted from the total time allocated to the requirement in any associated bookings. This allows users to quickly see the total duration fulfilled for active work on the requirement regardless of the associated travel time.

Next steps

- Add travel charges in Field Service
 - Get Resource Scheduling Optimization
-

Feedback

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Schedule bookings within time constraints

Article • 06/07/2024

When scheduling an entity enabled for scheduling, set date and time parameters to control when to book the requirement.

The time parameter fields **Time From/To Promised** and **Time Window Start/End** all exist on the resource requirement entity. Use these fields when scheduling entities other than work orders.

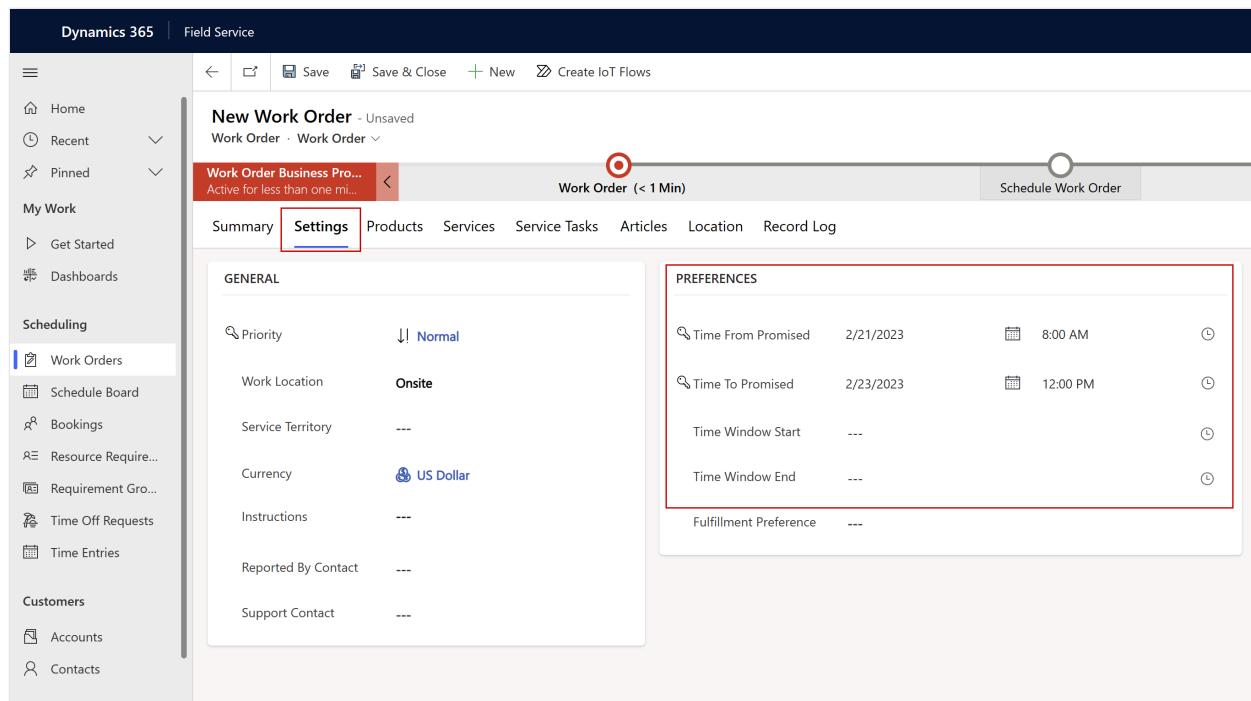
ⓘ Note

Field Service doesn't support variable calendars, which limit scheduling to certain days and times. For example, if a customer requests completion of the work order on Monday, Wednesday, or Friday between 12:00 PM and 5:00 PM. As a workaround, use notes to inform the dispatcher of the customer's preferences or [create booking rules](#) that use custom logic with JavaScript.

Schedule a requirement in a time frame

Schedule a requirement to between a start and end date and time.

On the **Settings** tab of a work order, set the **Time From/To Promised** fields to define the time window in which a resource must arrive and start the work. These values automatically populate the corresponding fields on the related resource requirement and vice versa.



When searching for suitable resources to work on the requirements, the schedule assistant populates the filters accordingly. Resources available for the entire duration show as options. The time promised window needs to be within the search range (search start and search end) to show as a search result. If a value of the time promised window is missing, the system uses the other value. To return such results when searching, make sure the search range includes the time from promised plus the expected duration. If no value for the promised time value is provided, the fields are ignored when searching in the schedule assistant.

Set a time zone for the requirement

Define a time zone on the requirement to help dispatchers view schedule assistant results in the time zone of the customer. On a requirement, select **Modify Calendar** and choose a time zone from the dropdown.

When you book the requirement, the start times of the schedule results will reflect the selected time zone.

Customize start and end date fields

You can customize which fields serve as the start and end dates for the related requirement in the booking setup metadata. In the Resources area, under **Administration**, select **Booking Setup Metadata**. Select the entity name and go to the **Attribute Mapping** section to choose any date/time field you want to use.

Next steps

- Define intervals and time groups with fulfillment preferences
 - Set up booking rules
-

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Add preferred resources for a requirement

Article • 07/19/2024

Add preferred resources to a requirement to apply restrictions on resource matches when you use the schedule assistant or Resource Scheduling Optimization for scheduling. The **Preference Type** field determines how the resources are matched. You can add, change, or remove preferred resources.

1. In Dynamics 365 Field Service, select the **Service** area.
2. Under **Scheduling**, select **Resource Requirements**.
3. Open a resource requirement, and select **Related > Resource Preferences**.
4. For each resource, define a preference type:
 - *Preferred*: The [schedule assistant](#) shows preferred resources first in the Gantt view if they match all other requirements and filters. It also shows a heart icon next to the name of each preferred resource.
 - *Restricted*: The [schedule assistant](#) filters out any resources that are marked as restricted. The filter can be removed by using the filter pane.
 - *Must choose from*: The [schedule assistant](#) filters results so that they include only these resources. If none of the resources are available, the schedule assistant doesn't return any results. The filter can be removed by using the filter pane.
5. Select **Save & Close**.

Use preferred resources with Resource Scheduling Optimization

If you want [Resource Scheduling Optimization](#) to consider preferred resources, add the *Maximize Preferred Resources* objective to the optimization goal. Resource Scheduling Optimization then tries to match *Preferred* resources, it always selects *Must choose from* resources, and it never selects *Restricted* resources.

Feedback

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Quickly schedule work orders and requirements

Article • 11/26/2024

Quick scheduling (sometimes referred to as 'quick book') simplifies the schedule assistant experience.

Without leaving a record, use a scheduling pane to see available booking time slots.

Prerequisites

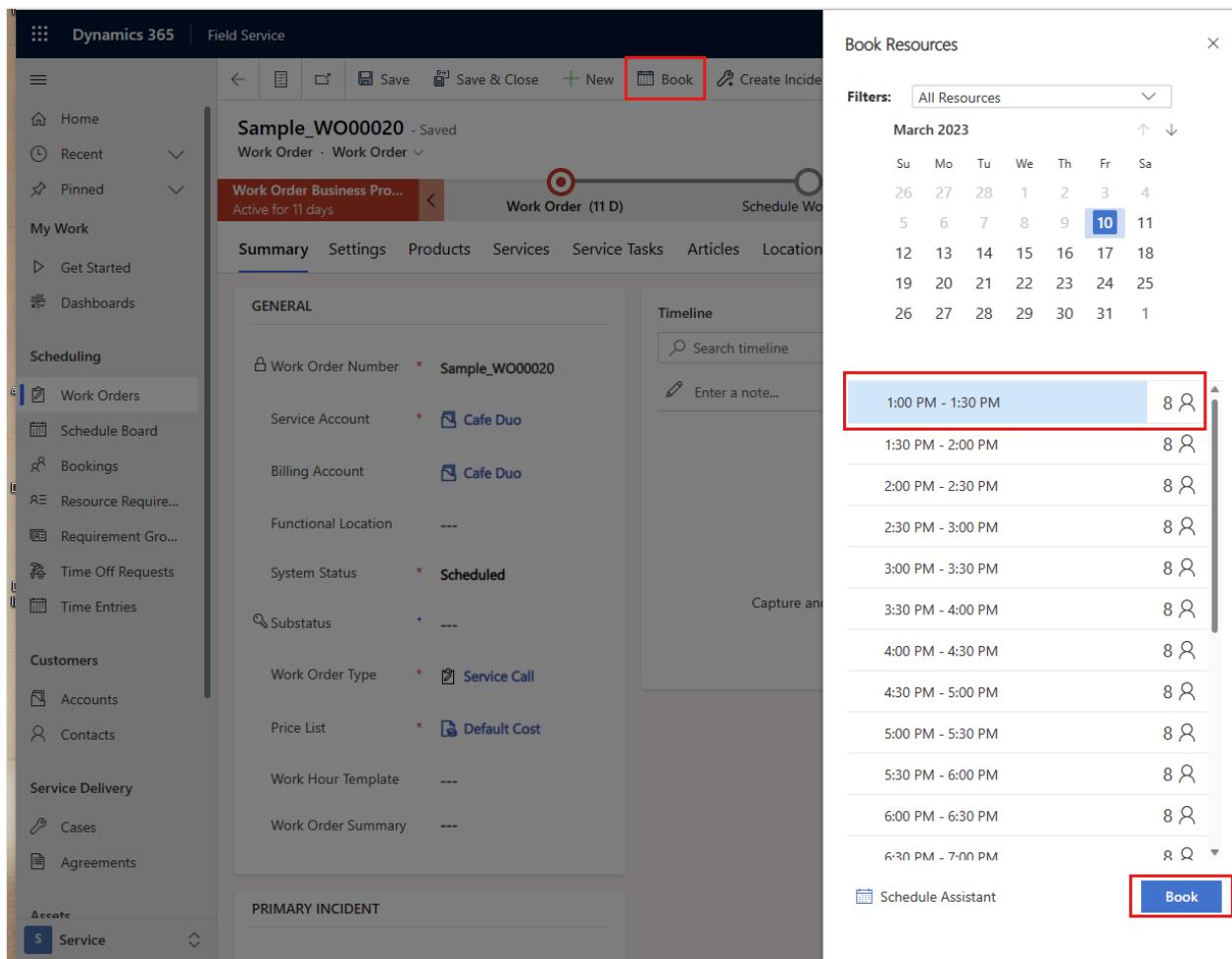
- An admin [enabled the quick book setting in the booking setup metadata](#). If the setting is disabled, booking controls [launch the schedule assistant](#) instead.
- Quick scheduling is enabled or disabled for each entity that is enabled for scheduling. For example, you can enable quick scheduling for work orders, while still using the full schedule assistant for projects. For requirements with no parent entity, use the **Default Metadata Settings (none)* option.

⊗ Caution

Quick Scheduling does not support fulfillment preferences with time groups.

Quickly book a job

1. Open a bookable entity or a resource requirement and select **Book**.
2. In the **Book Resources** pane, choose the suggested time slot and select **Book** to confirm.



The system chooses an available resource that also meets other requirement criteria like skills and organizational unit. If the requirement is location-based, the system chooses the closest resource. For location-agnostic requirements, the system chooses the first available resource based on alphabetical order of the resource's first name.

To use your preferred time slots, [define intervals with fulfillment preferences](#). However, quick book doesn't support time groups.

ⓘ Note

After quick booking a *single requirement*, selecting **Book** again for the same requirement creates an additional booking and will not rebook the previous one. Selecting **Book** again for a *requirement group* triggers the rebook process, which cancels previous bookings.

Filter options for quick book

There are a few basic filters for the quick book pane.

- You can change the date range, which the system derives from the requirement. If there's no start or end date on the requirement, the search window defaults to 60

days from today.

- Select the resource icon next to a time slot to see the list of matching resources and choose your preferred option. The list also includes some details like travel time and distance.
 - Select **Schedule Assistant** in the quick book pane to [launch the full experience of the schedule assistant](#) with more filter options.
-

Feedback

Was this page helpful?

 Yes

 No

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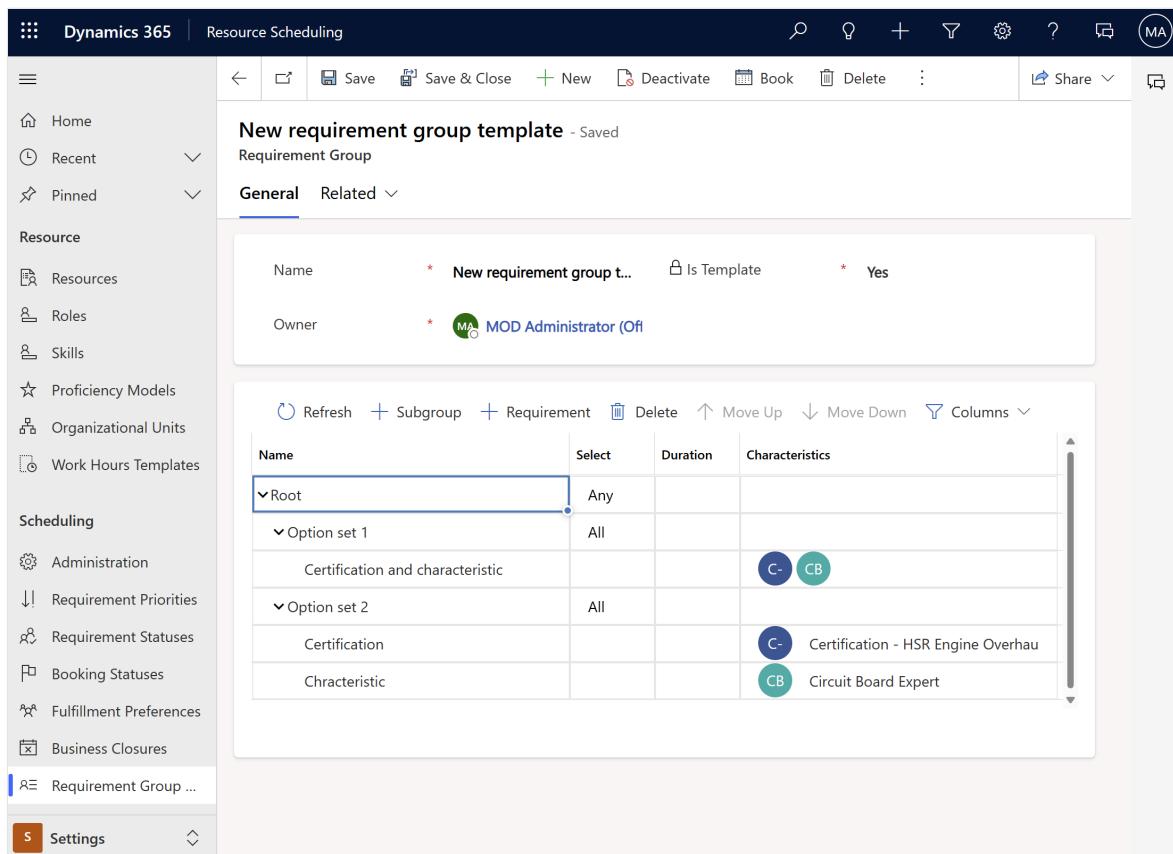
Schedule work with multiple requirements using requirement group

Article • 11/27/2024

Requirement groups bundle requirements commonly scheduled together. For example, you might require a pre-inspection, an installation, and a final inspection every time a specific job is performed. With a requirement group, all three requirements can be created with a single template. Each requirement in the template can have distinct characteristics, and the work can be scheduled collectively as a single unit. With the schedule assistant, resources are selected that match the characteristics for each requirement.

Create a requirement group template

1. In Universal Resource Scheduling, open the **Settings** area. Under **Scheduling**, select **Requirement Group Templates**, and then select **New**.
2. Enter a **Name** for the requirement group and **Save** it. The table shows requirement details with a root requirement named after the template.
3. Add requirements and fill in the fields in the columns. All requirements within a requirement group must have the same duration. Change the duration of individual bookings after booking the requirement group.



4. In the **Select** column on the root requirement, choose the preferred option.

- **All:** Resources must fulfill all requirements.
- **Any** The system searches for resources that can fulfill any requirement and that fulfilling one requirement fulfills the entire requirement group.

The **All** or **Any** setting allows you to add multiple options for fulfilling a requirement group, which is done by adding subgroups. If the root requirement is set to **Any**, and each subgroup is set to **All**, the schedule assistant searches for either **all of option 1 or all of option 2**.

These settings are especially useful when you add multiple option sets to a requirement group using subgroups. For example, if a job requires a certain skill and a specific certification, one resource can fulfill both requirements (option set 1) or two resources can fulfill one requirement each (option set 2). Any of these combinations would fulfill the requirement group.

5. To add more details to a resource requirement, select **Open Form**.

6. **Save** the requirement group template.

Create a requirement group

1. In Universal Resource Scheduling, open the **Resource Scheduling** area. Under **Scheduling**, select **Requirement Groups**, and then select **New**.

2. Enter a Name.
3. Optionally, choose an existing **Requirement group template** from the drop-down list and **Save**.
4. Edit the requirements in the requirement group as required.

Book a requirement group

Open a requirement group and select **Book** to launch the schedule assistant and get available resources that can fulfill the requirement group. By default, it recommends options that require the fewest resources first. Book the selected resource or resources. Then save and close the requirement group.

Booking an option for multiple requirements creates multiple bookings.

Keyboard shortcuts

You can use keyboard shortcuts when creating requirement groups.

 Expand table

Command	Keys
Expand collapsed row	SHIFT ALT +
Collapse expanded row	SHIFT ALT -
Indent task	SHIFT ALT right arrow
Outdent task	SHIFT ALT left arrow
Move task up	SHIFT ALT up arrow
Move task down	SHIFT ALT down arrow
Add new row	SHIFT ALT insert
Delete row	SHIFT ALT delete
Refresh	SHIFT ALT F5
Edit	SHIFT ALT F2

Requirement groups for field service scenarios

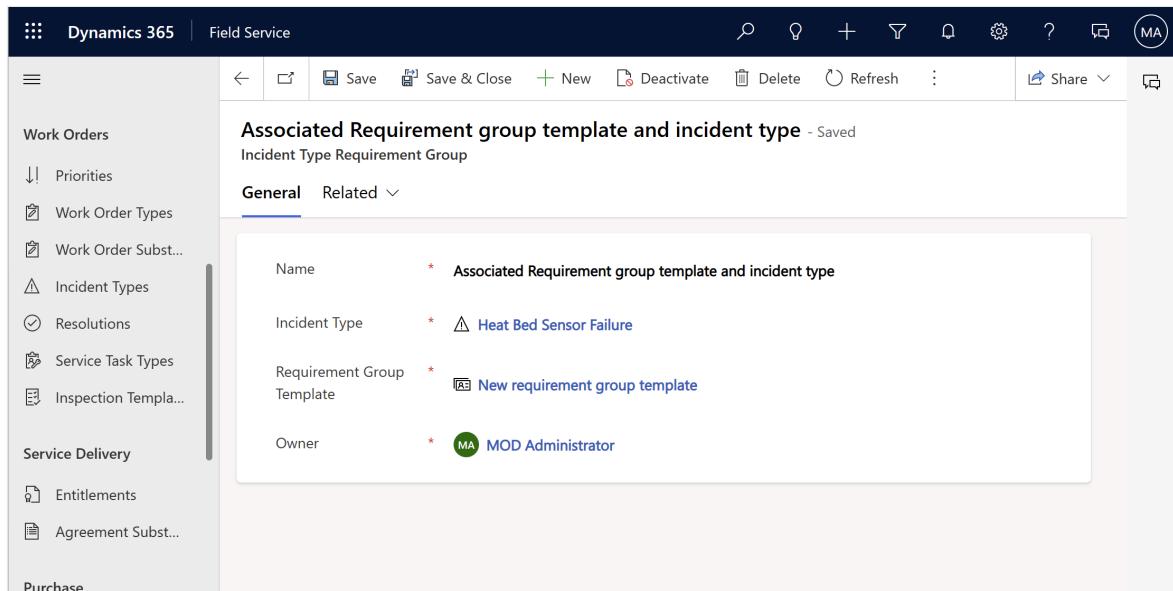
Requirement group templates are designed to work with [incident types](#). Associate a requirement group template to an incident type to automatically add requirement groups to work orders. Requirement groups can influence the performance for creating work orders and work order incidents. The degree of influence depends on the number of requirements in a requirement group.

1. In Field Service, open the **Settings** area. Under **Work Orders**, select **Incident Types**.
2. Select an incident type, open the **Related > Requirement Groups** tab, and select **New Incident Type Requirement Group**.

① Note

Incident types with characteristics can't relate to requirement group templates. Associate the characteristics with requirements in the group instead.

3. Enter a **Name** and choose a **Requirement Group Template** to associate the template with the incident type. Then select **Save and Close**.



4. After saving the record, [add the incident type to a work order](#).

You can now book the work order.

① Note

When requirement groups perform onsite work, the schedule assistant looks for groups of resources that can arrive at the same time, not resources that can begin traveling at the same time.

Feedback

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Schedule work over multiple days

Article • 04/19/2024

Requirements can be scheduled across multiple days and weeks. Dispatchers can schedule multi-day work in between existing bookings, by double-booking existing schedules, or as a continuous block of time.

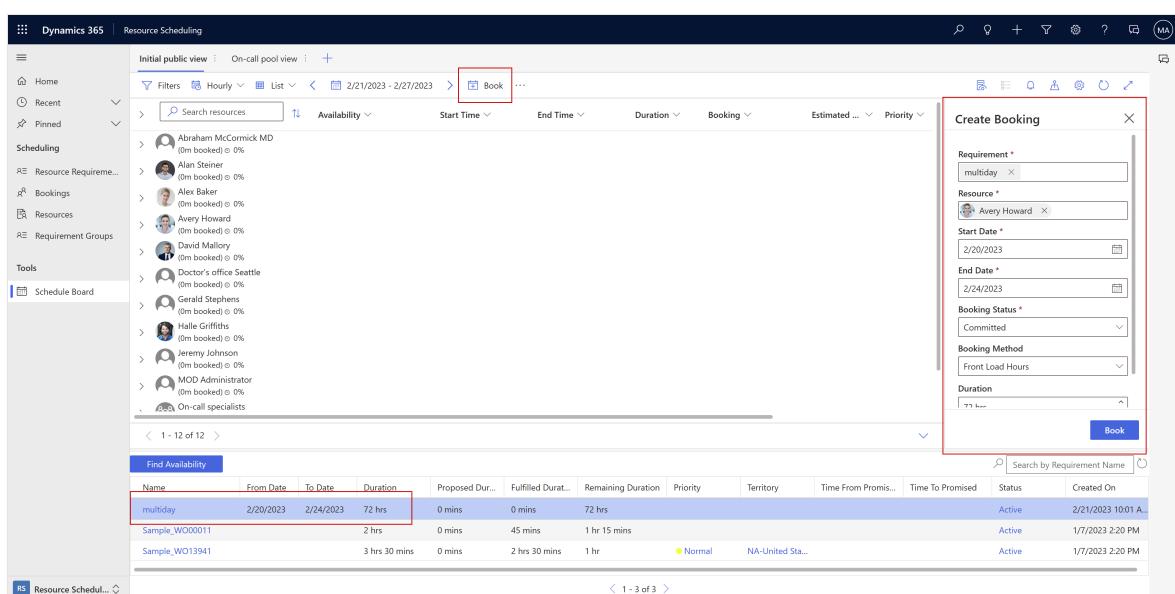
Tip

If the work you wish to schedule spans multiple weeks or has dependencies on previous steps and milestones, consider using [Dynamics 365 Project Service with Gantt chart functionality](#).

Schedule a multi-day requirement manually on the schedule board

Manually scheduling a multi-day requirement on the schedule board allows you to choose the allocation method to determine the breakdown of the bookings created when scheduling. If you are using requirement details to define the allocation method, manually scheduling the requirement will ignore them. Use the [schedule assistant](#) instead.

1. Open the schedule board on the hourly view and select a multi-day requirement in the requirements pane.
2. Then, select a resource on the board for which you would like to schedule the multi-day work order requirement and select **Book**.



The screenshot shows the Dynamics 365 Resource Scheduling interface in the 'Hourly' view. The 'Requirements' pane on the left lists a requirement named 'multiday'. The main grid shows several resources with their availability. A 'Create Booking' dialog is open, showing the following details:

Requirement *	multiday
Resource *	Avery Howard
Start Date *	2/20/2023
End Date *	2/24/2023
Booking Status *	Committed
Booking Method	Front Load Hours
Duration	72 hrs

At the bottom right of the dialog is a 'Book' button. The status bar at the bottom of the screen shows '1 of 3 of 3'.

✖ Caution

Don't drag and drop multi-day requirement to a resource on the hourly board view. It will create a long continuous booking through non-working hours.

3. In the **Create Booking** pane, review and update the values as needed. Choose the **Booking Method** to define how to spread the requirement over multiple days.

- **Full Capacity:** Books the resource's full capacity for the specified from and to dates without regard to the resource's remaining capacity or the duration of the requirement.
- **Percentage Capacity:** Books the resource for a percentage of capacity for the specified from and to dates.
- **Evenly Distribute Hours:** Books the resource for a specified number of hours, distributing the time evenly per day over the specified from and to dates.
- **Front Load Hours:** Books the resource for a specified number of hours, front-loading the per-day hours over the specified from and to dates. The front load method considers existing bookings and available capacity.

ⓘ Note

Full Capacity, Percentage Capacity, Evenly Distribute Hours, and Fixed time can lead to overbooking. For more information, see [Allocation methods](#).

4. Select **Book** and the system creates multiple bookings across multiple days.

Create and edit patterns for requirements

Use the **Specify Pattern** control to define how to split a long-running requirement into individual bookings when it's scheduled. It allows users to customize these requirement details beyond the default allocation methods.

To create a requirement detail, select **Add detail** to open a side pane where you choose the requirement and set the duration, start time, and end times for the time window. For example, the time window is from 9am to 5pm with a three hour duration. When you schedule that requirement detail, the system books a resource for three hours between 9am and 5pm. Note that the duration must be shorter than the time window.

Alternatively, in daily view, drag requirement on the grid to create a new detail. In either method, select **Apply** to save the requirement detail.

To edit an existing requirement detail, select it to open the **Edit detail** pane. Change the duration or time window and save the changes. To edit multiple details at once, select the requirement and select **Edit all within range** on the details pane. Under **Duration summary**, each date range that has at least one detail shows. Adjust the allocated duration where needed. Use the settings under **Duration allocation** to control how to distribute the changed durations across multiple details. When decreasing duration, there are two options:

- Proportionally distributed: The decrease in duration is split among all contained details in proportion to their respective durations, so that all are decreased by the same percentage.
- Subtracted from total: The decrease is subtracted from the total length of all contained details. This new total is then evenly distributed among contained details.

When increasing duration, there are four options:

- Proportionally Distributed: The increase in duration is split among all contained details in proportion to their respective durations, so that all are increased by the same percentage.
- Front loaded: The increase in duration is added to the first contained detail until it hits capacity. It is then added to the next detail and so on.
- Distributed Evenly: The increase is split evenly among all contained details.
- Added to total: The increase is added to the total length of all contained details. This new total is then evenly distributed among all contained details.

To delete a detail, select the detail from the calendar and select the **Delete**.

Use work hours templates

Alternatively, you can set up a work hours template, which you can assign to a resource requirement. The system generates resource requirements details based on the work hours template.

Schedule a multi-day requirement with the schedule assistant

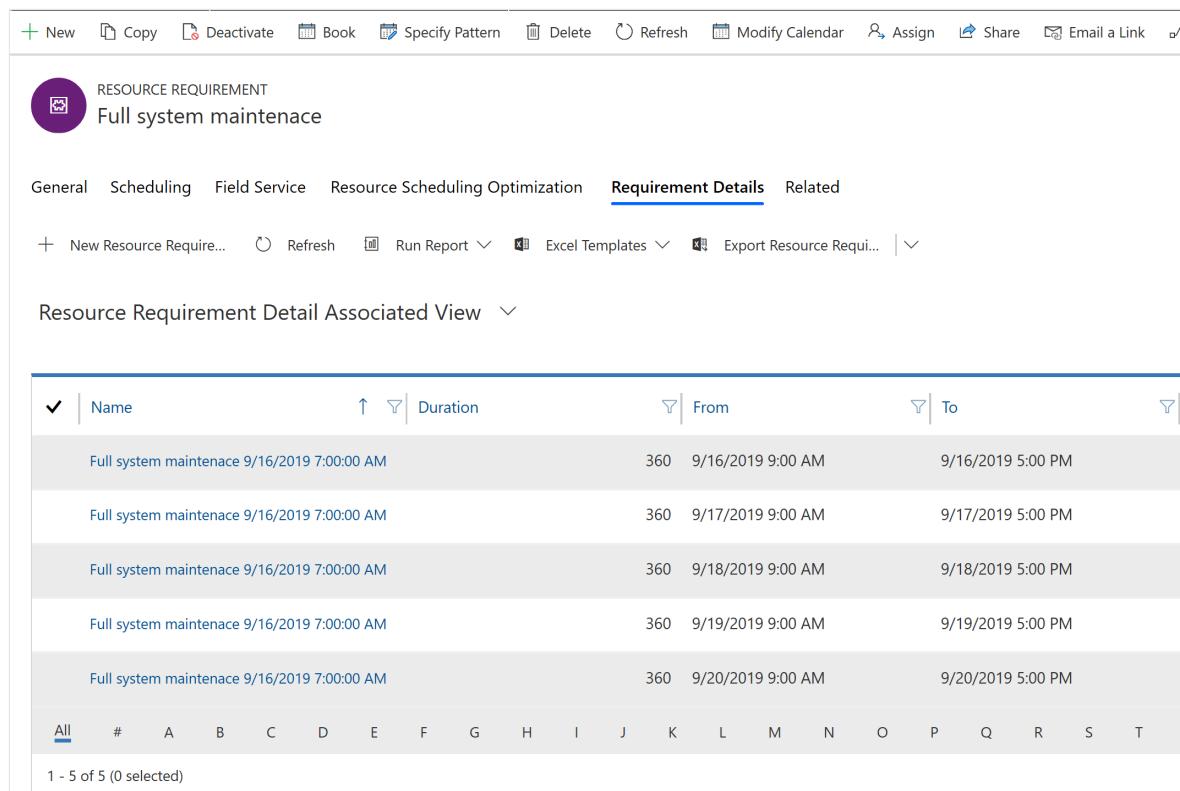
Note

This scenario schedules a requirement without a related work order. To schedule a multi-day work order with the schedule assistant, you'll need to manually add a

related requirement with an allocation method to a schedulable entity and delete or disregard the automatically created ones. Alternatively, you can manually create requirement detail records with **Specify Pattern** for the auto-created requirement. The requirement needs an allocation method set before saving and the requirements that are automatically created by schedulable entities have an allocation method of **None** by default.

1. Create a multi-day requirement record with an allocation method set. Provide details such as skills, roles, resource preferences, and service territory to define the eligible resources.
2. On the requirement records, go to **Related > Requirement Details**.

The system automatically creates requirement details and splits them into segments based on the duration and the allocation method. The requirement details are based on the requirement's calendar. Edit them by selecting **Modify Calendar** on the resource requirement record.



The screenshot shows the 'Requirement Details' tab for a resource requirement named 'Full system maintenance'. The table lists five requirement details, each with a name, duration, and start and end times. The requirement details are identical, representing a 360-unit duration from 9/16/2019 7:00:00 AM to 9/20/2019 5:00:00 PM.

Name	Duration	From	To
Full system maintenance 9/16/2019 7:00:00 AM	360	9/16/2019 9:00 AM	9/16/2019 5:00 PM
Full system maintenance 9/16/2019 7:00:00 AM	360	9/17/2019 9:00 AM	9/17/2019 5:00 PM
Full system maintenance 9/16/2019 7:00:00 AM	360	9/18/2019 9:00 AM	9/18/2019 5:00 PM
Full system maintenance 9/16/2019 7:00:00 AM	360	9/19/2019 9:00 AM	9/19/2019 5:00 PM
Full system maintenance 9/16/2019 7:00:00 AM	360	9/20/2019 9:00 AM	9/20/2019 5:00 PM

3. Select **Book** to launch the schedule assistant for the multi-day requirement.

Resources with availability and that meet the other attributes will show as results. Choose a resource, the dates, and select **Book** to create multiple bookings according to the pattern of the allocation method.

Schedule a multi-day requirement to multiple resources

1. From a multi-day resource requirement, go to **Related > Requirement Details** and select **Specify Pattern**. Edit and override the requirement details pattern created by the allocation method.
2. Select **Book**.
3. Choose a resource and specific days for just that resource, then select **Book (not Book & Exit)**.
4. Then, choose another resource and specific days for only that resource and select **Book** again.
5. The system creates bookings for each resource on the days selected.

ⓘ Note

- Resources don't need continuous availability in a single block. For example, if the requirement is a resource for five hours in a day, resources with five total hours of availability show in schedule assistant results.
- The system can't schedule requirement groups for multiple days.

Next steps

- [Allocation methods](#)
- [Multi-resource scheduling](#)

Feedback

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Group resources in crews

Article • 05/14/2024

Resource crews allow dispatchers to search and schedule multiple resources at once. Resource crews can include a group of employees, subcontractors, equipment, facilities, or any combination thereof who will perform the same work during a period of time. Crews speed up and simplify the scheduling process and allow team members to work together more consistently.

Dispatchers often use crews to schedule a requirement group with multiple requirements to multiple resources. However, you can schedule single requirements to crews too.

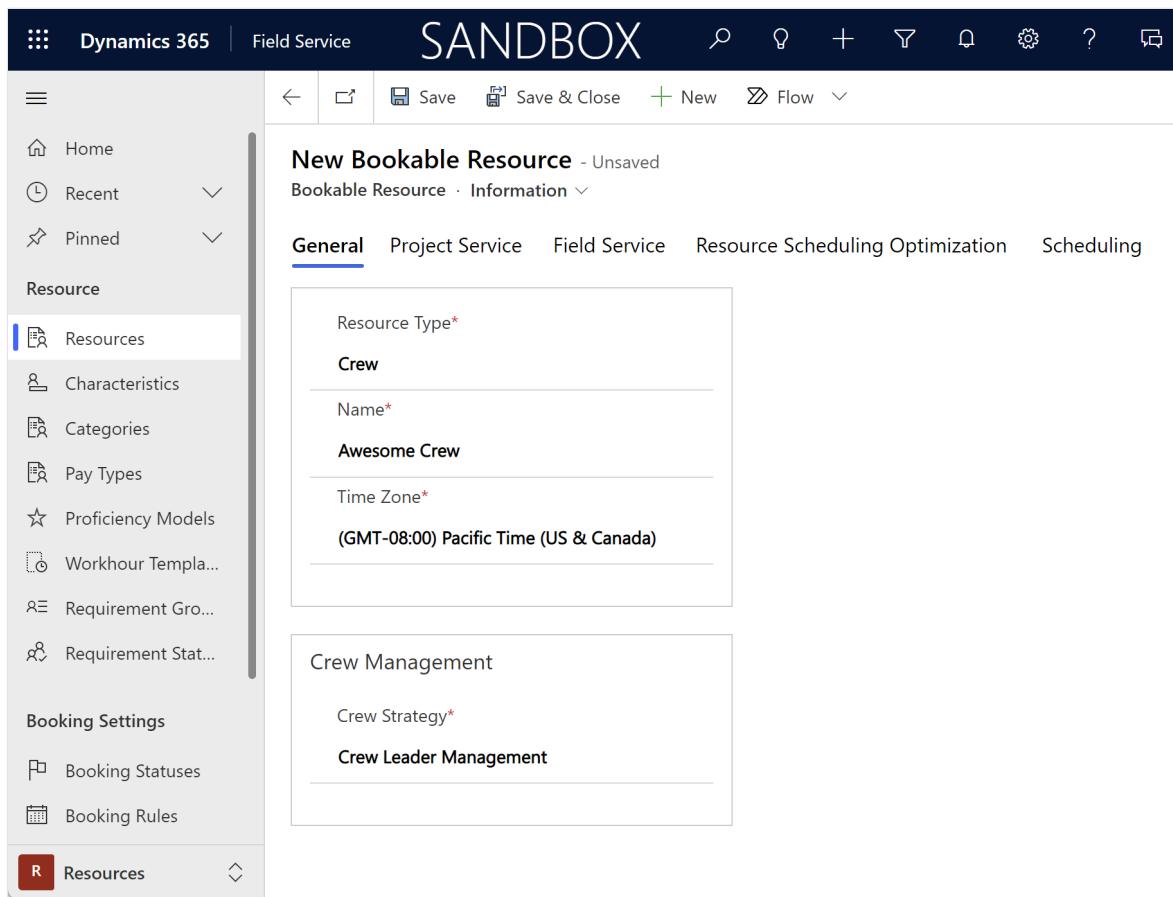
Crews are ideal for scenarios where:

- a group of resources will work together for some time.
- a crew meets at a location in the morning, shares a vehicle, and is together all day from job to job.
- a new employee is shadowing an experienced co-worker to learn new skills.

Create a Crew

A crew is a bookable resource which is essentially a container for the child resources who are members of the crew.

1. Open the **Resources** area and under **Resource**, select **Resources** and select **New**.
2. Choose **Crew** as the **Resource Type**.
3. Provide a **Name** and choose the **Time Zone** for the crew.
4. Choose a **Crew Strategy**. There are three [Crew strategy options](#).



5. On the **Scheduling** tab, set the **Start Location** and **End Location**. For detailed descriptions of the location options, go to [Set up bookable resources](#).
6. Select **Save**.

Crew strategy options

The crew strategy determines how the crew manages its work once it moves past the *Scheduled* status (e.g. *Travelling*, *In Progress*, or *Completed*). There are three options:

- **Crew Leader Management:** Crew leader manages the work of a crew. Consider this option when a crew consists of multiple people. You can only have one resource designated as the leader at a time, and there must be a leader to create a work order booking.
- **Crew Member Self-Management:** Resources can manage their own work even once the booking has begun. Choose this option for crews that are groups, which regularly work together, but may not always work together at the same place or time. Self-management also means better time capturing, which is good for organizations who bill for time spent on work.
- **Cascade and Accept Cascade Completely:** All resources on a crew can manage all the work throughout all statuses. It's the ideal option when a crew consists of one individual and the rest of the crew is equipment.

Note

The logic associated with crew strategies will only impact work order related bookable resource bookings. If an assigned resource updates their own booking to *Completed*, the end-time value is updated to the current time stamp. If another user or crew member updates a booking status to *Completed* on behalf of an assigned resource, the booking end time preserves the previous end time value.

Crew strategies also affect if and how a crew booking is rescheduled when there are changes made to an associated resource booking.

Add resource children to a crew

Relate other bookable resources to the crew as crew members. If not done already, [create the bookable resources](#).

1. Open the **Crew** resource.
2. Select **Related > Resource's Children**.
3. Select **New Bookable Resource Group**.
4. Choose the **Child Resource** and set the date range when the resource will be part of the crew.
5. Choose the **Crew Member Type** and specify if the resource is a member of the crew or its leader. To get set as a leader, the bookable resource needs the type *user*.
6. Select **Save & Close**.

Awesome Crew - Saved
Bookable Resource · Information

General Project Service Field Service **Resource's Children** ...

Show Chart + New Bookable Resour... Refresh Flow ...

Bookable Resource Group Associated View

Name ↑	Parent Resource	Child Resource	From Date	To Date	Created On
Brady's crew	Awesome Crew	Brady Hannon	9/26/202...	3/3/2023 ...	9/26/2022 1
Christie's crew	Awesome Crew	Christie Daws...	9/26/202...	3/3/2023 ...	9/26/2022 1

1 - 2 of 2 Page 1

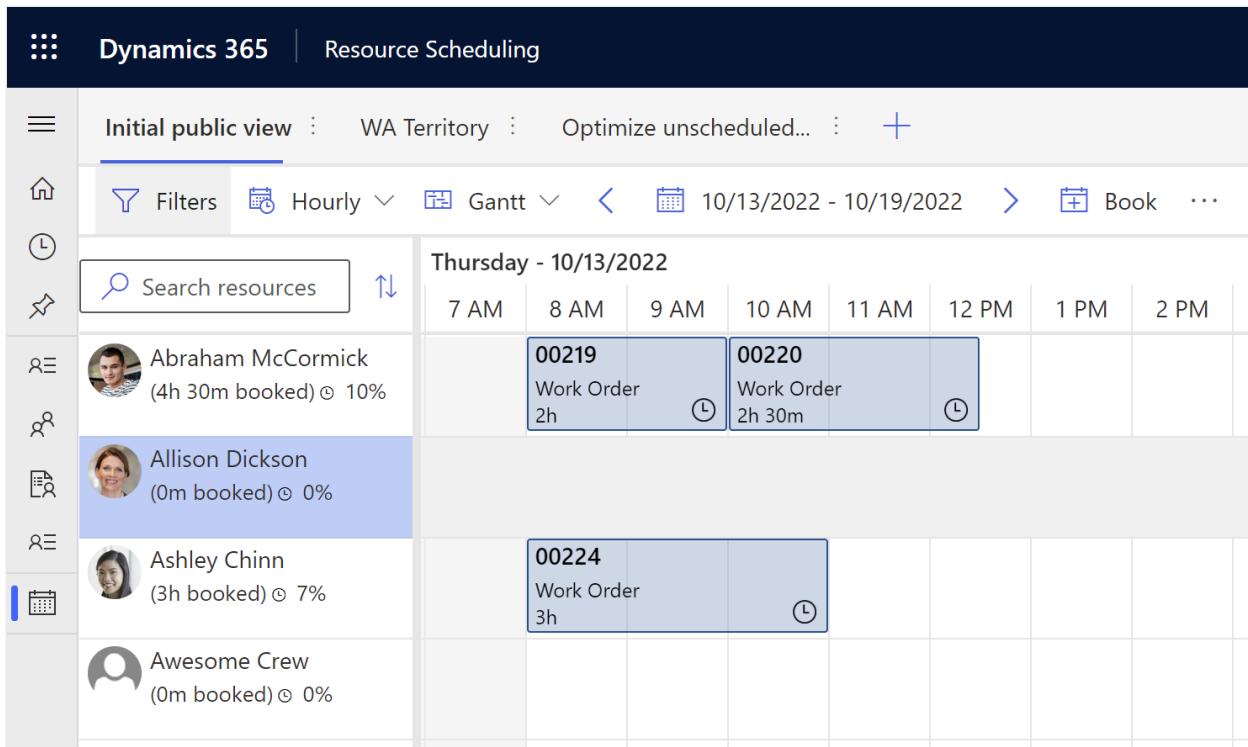
Tip

Start and end location of resources are important to book onsite requirements. The system takes crew member locations from their individual resource profiles and not from the parent crew. It's important that you change the location of the crew member resource if a resource moves between crews. For example, if you want a crew to meet at a central location in the morning, specify start and end location as organization unit address for the crew header resource *and* the resource children.

Crews on the schedule board

Crews and its members show on the schedule board like any other resource. Crews that match the filters of the schedule board show in the list of resources, even if the resource children of the crew don't match the filters.

Crew resources use a different icon than individual resources. The time range a resource is part of a crew shows as a grey area on the board. It reminds dispatchers and resource managers that the resource is part of a crew.



Scheduling a job to an individual crew member affects the availability of the entire crew.

Schedule single requirements to a crew

Assign a single requirement to the crew resource to create a booking for the entire crew.

You can't manually schedule requirement groups to crews, only single requirements.

The [schedule assistant](#) shows each crew member as individual resources. If booked, only that single resource gets a booking. The crew resource can also return in the results if the working hours and other constraints match. Booking a crew books all crew members and the crew under the following conditions:

1. The booking falls within the "FromDate" and the "ToDate" configured for the bookable resource group belonging to the crew member.
2. There are work hours configured for the crew member on the day(s) of the booking and the booking falls within those work hours.

ⓘ Note

When a single requirement is booked to a crew, manually or with the schedule assistant, a requirement group is automatically created and all bookings are related to the requirement group. It ensures that crew bookings are in sync if you change them. The **Auto Group Type** of the requirement group is set to **Crew**.

However, only the crew header resource is linked to the single requirement in the newly created requirement group.

Schedule requirement groups for the crew with the schedule assistant

Scheduling a set of requirements to a group of resources that works together is the primary use case for crews.

The schedule assistant can return suggest a group of individual resources and a crew to complete a requirement group.

When the schedule assistant searches, it assembles a group of resources for every requirement in the requirement group. The crew resource itself is just a container.

Expand the crew to see how crew members match a requirement within the requirement group.

When you select and book a crew, the booking for each crew member relates to the requirement that they match. It also relates to the requirement group. The crew resource gets a booking too, so you can manage the crew as a single unit.

More crew members than requirements

A crew with more resources than needed by the requirement group will show as a result in the schedule assistant, but lower in the search results because it's less optimal.

You can still book a crew with excess resources. All of the bookings will link to the requirement group, but the bookings for non-matching resources will not have a link to a requirement.

Fewer crew members than requirements

Sometimes when searching for availability, the crew may need more resources in order to meet the requirements.

The schedule assistant will combine crews and individual resources to fulfill a requirement group and even note which resources are part of the crew.

Quickly change a resource's crew membership for a day

You can quickly make membership changes for crew resources by changing the crew allocation. Swap a resource from one crew to another, add an unassigned resource to a crew, or remove a resource from a crew. These changes apply for a single day in the crew's time zone. All future bookings for that day reflect the changes on the members' schedules.

 **Note**

To make changes to crews for longer than a day, edit the crew configuration directly.

To access the crew allocation tool, go to the the **Resources** page and open a view that has at least one crew type resource. Select **Crew Allocation** in the command bar. The tool opens the current day based on your local time and you change it using the date picker. Crews show in the tool according to their order in the view. You can edit up to fifteen crews simultaneously.

Use drag and drop to move resources between crews or assign available resources to a crew. To remove a resource from a crew, select the resource and select **Remove** in the command bar. You can select multiple resources by holding the Control/Command key while making your selection.

Save your changes to update a crew. After saving, the system processes membership changes. New members get a full day membership in the crew's time zone. Removed members get their existing crew memberships split with a full day gap. If there are small overlaps without bookings, the conflicting memberships will be resolved in favor of the target crew. For example, when moving a resource from a crew in one time zone to an adjacent time zone. During processing, the system doesn't allow further changes.

After the membership changes conclude, bookings begin to cascade asynchronously. New members get active bookings moved until after the day of they assignment in the crew. Members who are removed from a crew have their crew bookings cancelled. This may take a few minutes to process, depending on the number of bookings and resources.

 **Note**

If the leader on a leader managed crew is moved to a different crew, they will lose their leadership status for that day, even if they are returned to their original crew. To select a new leader or to restore this status, edit the crew configuration directly.

Crew allocation tool components

- Crew membership grid: Each crew has information about the number of resources that are available and expected for that crew, and the crew's time zone. An added resource is a member of that crew that from 12:00am to 12:00am in the crew's time zone. Resources that are assigned to the crew is listed alphabetically if they have a membership range that includes the majority of the given day in the crew's time zone.
- Bookings grid: A section shows all bookings that the crew has for the day. You can open the booking records for more details but you can't change them in the crew allocation tool.
- Available resources pane: It lists resources that are available for work but not members of a crew for the selected day. This list doesn't consider the resource capacity. It only shows resources that are working on this day. You can change the view and search for resources by name.

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Schedule requirements to a resource pool

Article • 11/27/2024

Resource pools are groups of similar resources. Dispatchers manage capacity and get the option to assign resources later.

Resource pool scheduling is useful in several situations:

- Avoid booking specific resources right away. For example, a hotel checks room availability (pool) and assigns a room (resource) to guests when they arrive.
- Collect requirements centrally but let a local manager book them. For example, a repair shop chain takes appointments through a call center. The central agent books the appointment to the customer's preferred location (pool). The local store manager assigns appointments to an available specialist (resource).
- Dispatchers know the capacity of a pool but not yet the specific resource it contains. For example, a trade show offers different booth options. It considers the capacity of booths (pool) when booking, but assigns the specific booths (resource) later.
- Enable overbooking for expected cancellations. For example, a hotel has a fixed number of rooms, but might inflate capacity and take more reservations than available rooms to account for cancellations.

Create a resource pool

We recommend creating pools that use the same resource type. If you want to create groups with different types of resources, [create a crew](#).

1. In Universal Resource Scheduling, open the **Resources** area. Under **Resource**, select **Resources** and select **New**.
2. On the **General** tab, set **Resource Type** to **Pool** and choose a **Pool Type**. Choose between facility, equipment, or a combination of account, contact, and user.
3. Enter a **Name** and choose a **Time Zone**.
4. On the **Scheduling** tab, choose a **Start Location** and **End Location**. Choose **Organizational Unit Address** to represent a physical location where the pool works, or **Location Agnostic** for a pool of resources work remotely.

(!) Note

Don't choose the *Resource address* option.

5. Choose an option for **Derive Capacity From Group Members** and then select **Save**.

- **Yes:** The capacity of the pool resource is calculated based on its member's work hour calendars. Pool capacity changes when adding or removing pool members.
- **No:** The system sets the capacity of the pool but you can change it. Adding and removing pool members doesn't change the capacity.

6. Add more resource attributes to consider for scheduling. Consider the pool as a standard resource as it relates to adding attributes like [characteristics](#) or [territories](#).

Add pool members

Add members to a pool through the bookable resource group entity (`bookableresourcegroup`). The location of the pool member is taken from the pool.

Name	Parent Resource	Child Resource	From Date	To Date	Created On
Alan on-call	On-call specialists	Alan Steiner	2/20/2023 ...	2/28/2023 ...	2/20/2023 10:36...
Gerald on-call	On-call specialists	Gerald Stephens	2/20/2023 ...	2/28/2023 ...	2/20/2023 10:36...

1. On a resource pool record, go to **Related > Resource's Children**.
2. Select **New Bookable Resource Group** and enter a **Name** for the resource. Choose a **Child Resource** and set a date range for the pool membership. Crews and other pools can't be made a child of a pool.
3. Select **Save**. Add other pool members as needed.