

Connected field service





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- Concerns and considerations
- Intelligent planning
- Empowered agents and technicians
- Technology unification
- Adaptable implementation
- Next steps

Do your current
business applications
enable the best field
services practices?





Transform
products



Optimize
operations



Engage
customers



Empower
people

The world's connected AI business cloud



Dynamics 365 & Power Platform

Supporting connected field service



Key considerations for delivering connected field service



Do your systems improve technician efficiency and enable monetizing new business models?



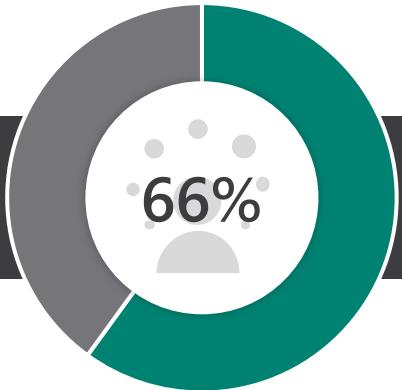
Are the technologies you're using today supporting your business needs?



How are you using analytics to predict issues and proactively provide solutions?



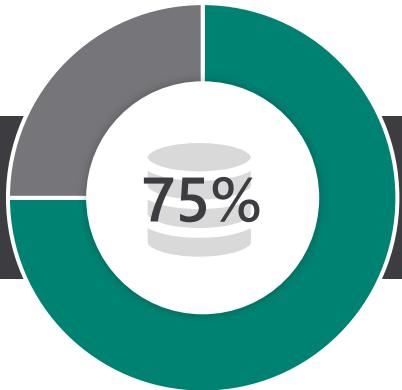
Business concerns



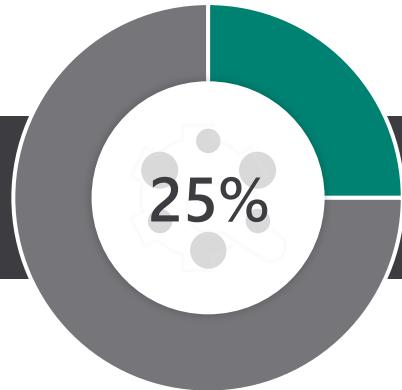
Organizations with budgets earmarked for proactive support technologies in 2018/19¹



Cost for every time a service company dispatches a truck²



Field service organizations that provide technicians with mobile apps³

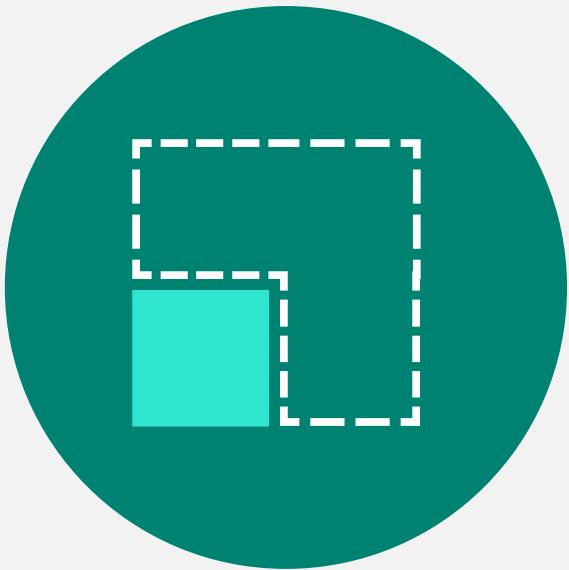


Average productivity increase through connected field service⁴

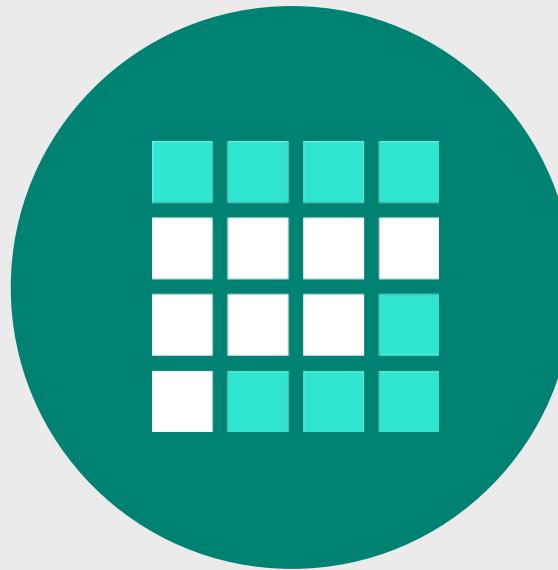
1. 2017 TSIA report on field service spending
2. MSDynamicsWorld

3. Gartner Field Service Report 2017
4. Gartner Field Service Survey

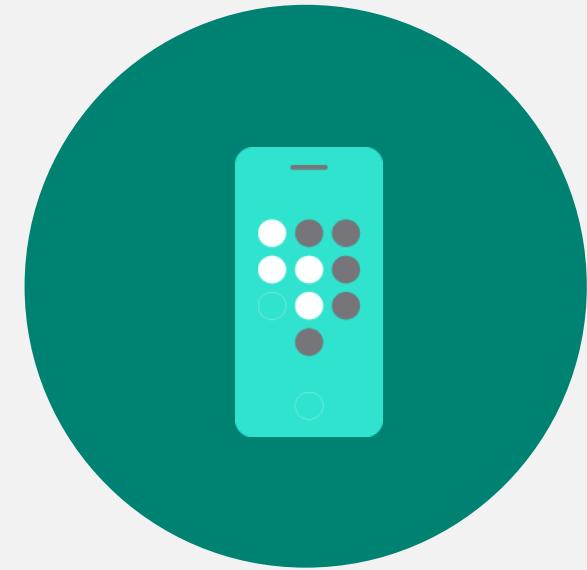
Typical functional concerns



Reactive, break-fix
business models and
inability to scale

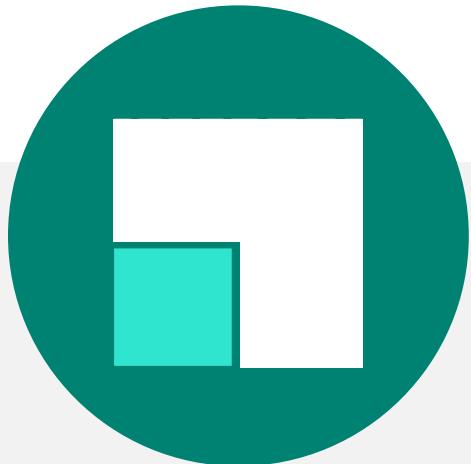


Outdated/siloed systems
causing inefficiencies

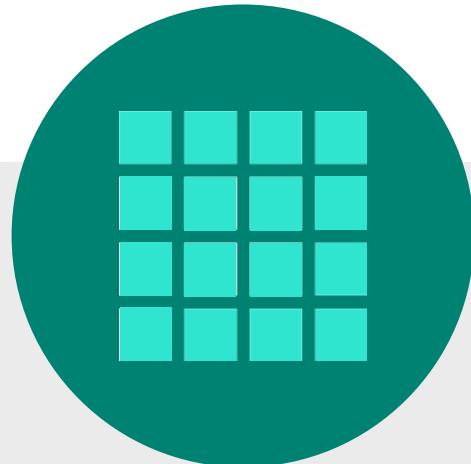


Poor technician
enablement due to lack of
mobile capabilities

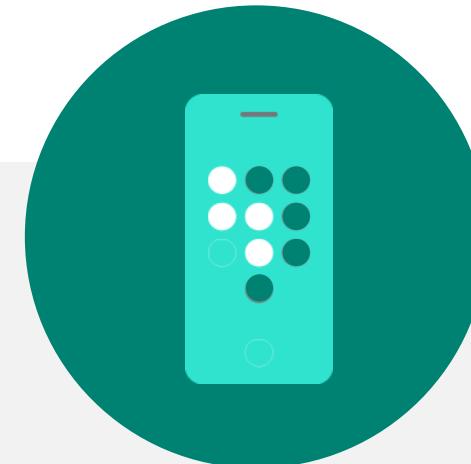
The changing landscape



Increased use of
proactive support
models



Real-time insights and
troubleshooting through
augmented reality
capabilities



Predictive maintenance
driven by data analytics,
ensuring proactive
customer engagement

Product complexity and increasing customer demands have surpassed
existing technology stack abilities to support operations¹

A focused approach to connected field service



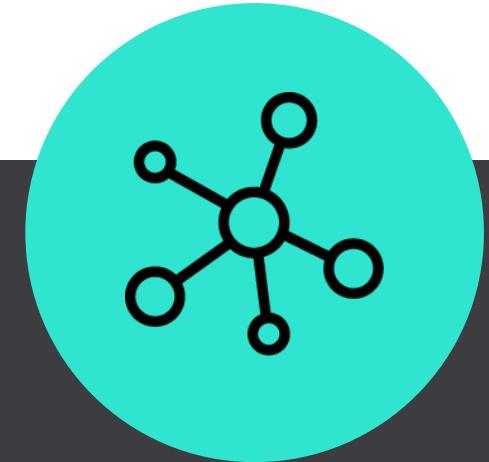
Intelligent planning

- Effectively plan and manage customer demands across all channels
- Efficiently manage service agreements and preventive maintenance



Empowered agents and technicians

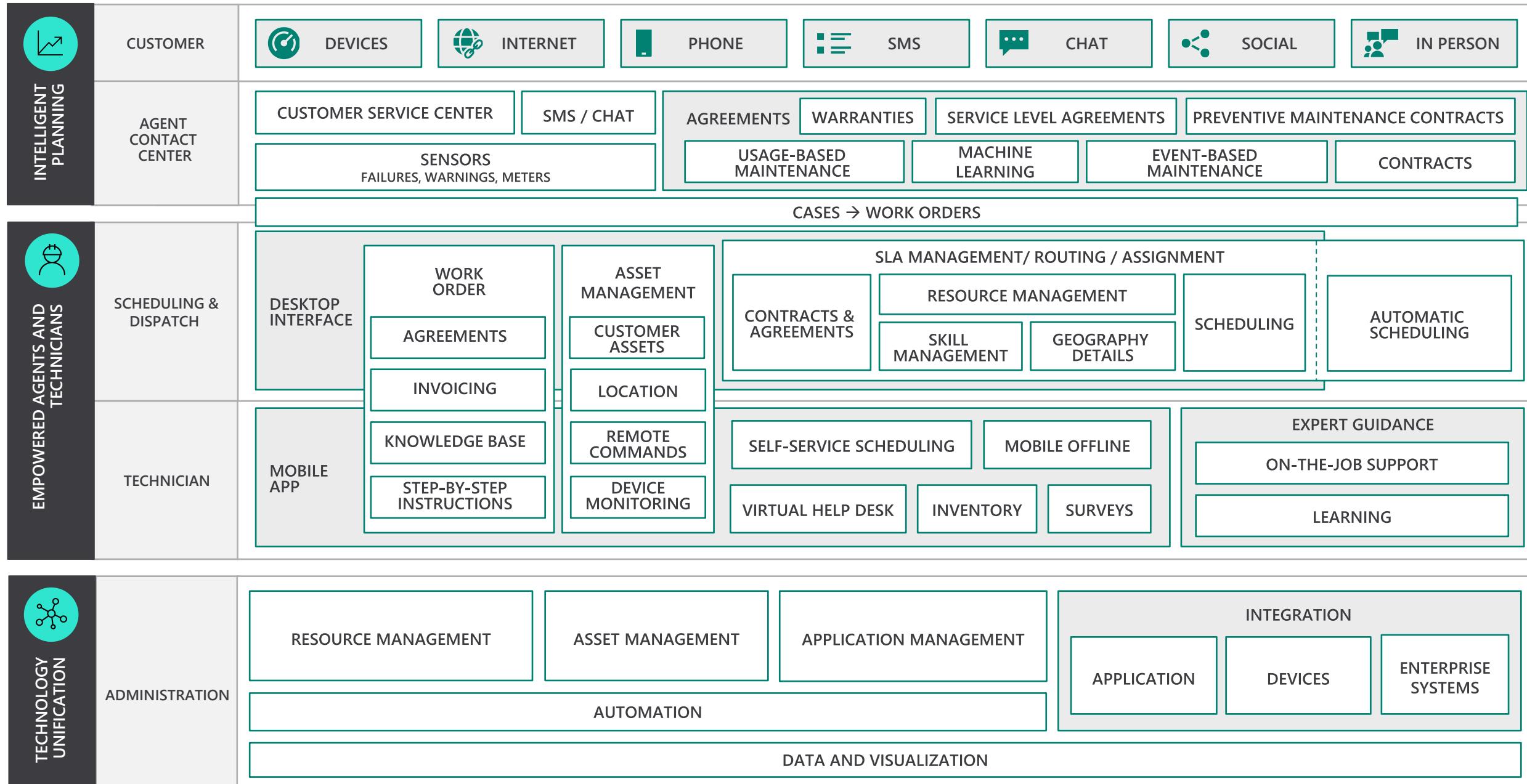
- Empower agents and technicians with tools to manage and solve cases
- Assist customers virtually with elevated training and guidance



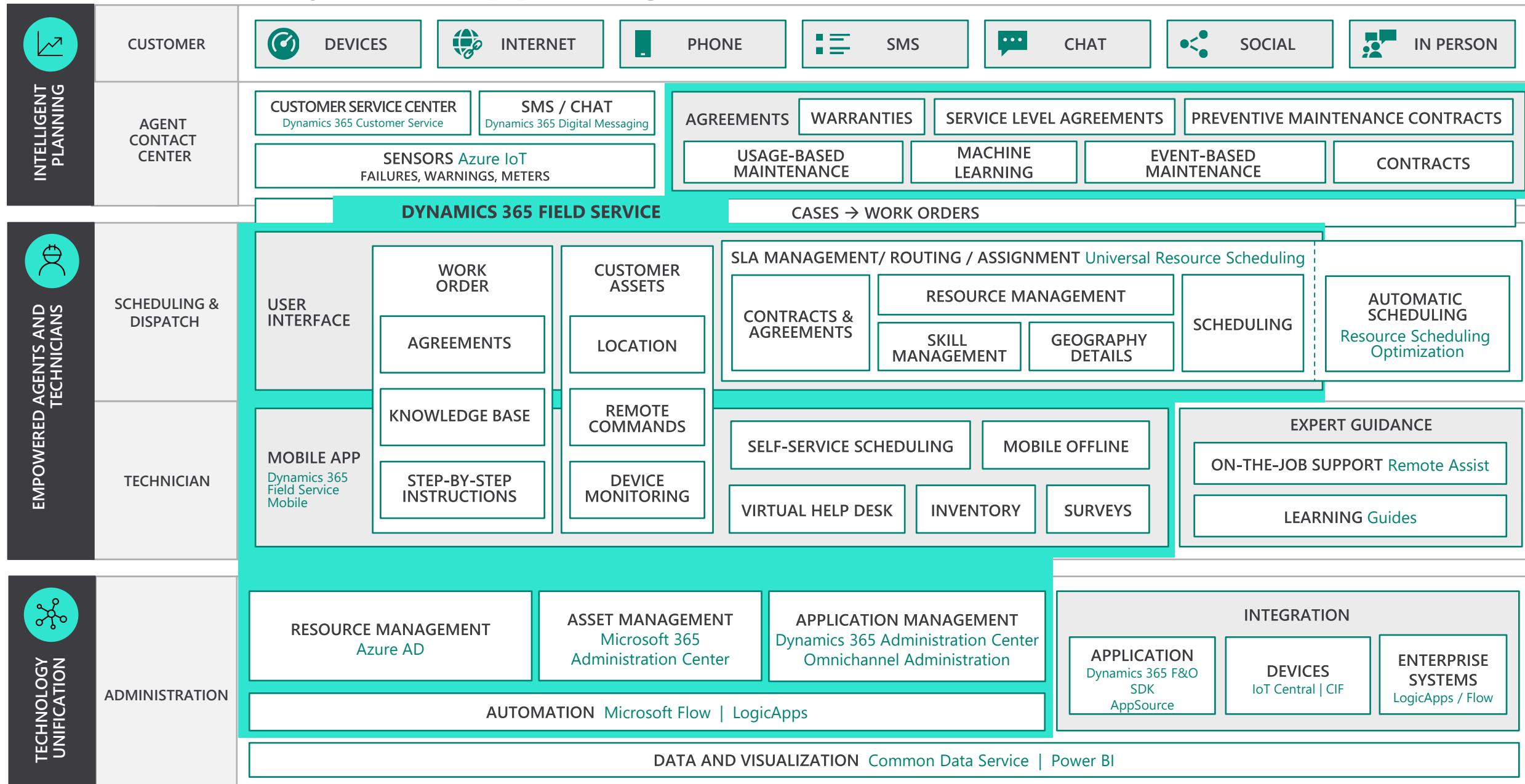
Technology unification

- Integrate and unify data, systems and apps to automate and manage complex business processes
- Gain real-time insights and visualization

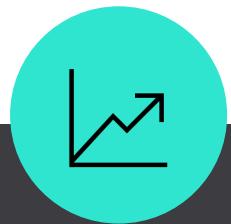
Functions enabling connected field service



Microsoft ecosystem supporting connected field service



Dynamics 365 provides the foundation to optimize field service



Intelligent planning

Multichannel customer engagement

Service agreements and preventive maintenance

Predictive maintenance enabled by Internet of Things (IoT)

Proactive field service driven by machine learning



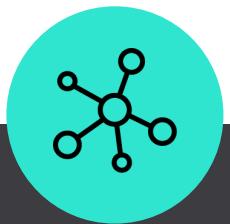
Empowered agents and technicians

Right people at the right time

Effective resource, asset, and inventory management

Active remote support of field technicians

Expert guidance and technician training plus enablement



Technology unification

Enhanced productivity with unified data, advanced reporting, custom analytics, and data visualization

Solution optimization through integration and automation

Customized client support and channel integration



Intelligent planning

- Multichannel customer engagement
- Service agreements and preventive maintenance
- Predictive maintenance enabled by IoT
- Proactive field service driven by machine learning



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Multichannel customer engagement



Connect with your customers



Effectively create work orders



Engage with your customers



Keep track of all service interactions



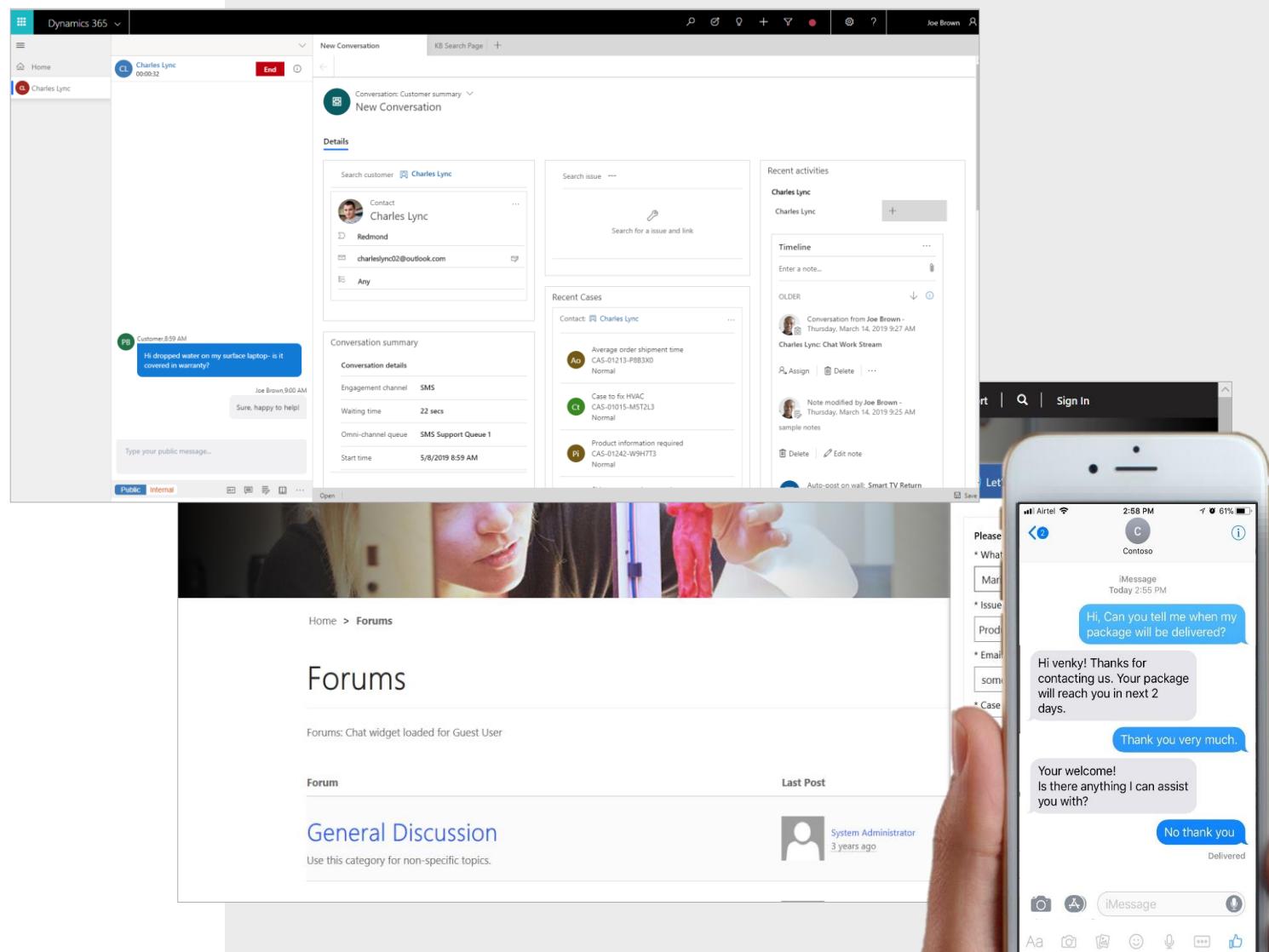
INTELLIGENT PLANNING

Multichannel customer engagement



Connect with customers

- Use multiple channels, like chat in Dynamics 365 and SMS, for contextual engagement with customers
- Deploy the chat widget to enable technicians and agents to connect with customers
- Automatically identify and load customer and work details





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Multichannel customer engagement



Effectively create work orders

- Create different work orders types, specify customized work order sub status, and add/set priorities
- Pre-define work order types to specify the various types of service jobs that can be performed within an order
- Maintain detailed record of work order timeline to enable customized customer engagement



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Multichannel customer engagement



Engage with your customers

- Send automated reminders and updates to customers through outbound text and phone capabilities
- Communicate proactively by providing your customers with real-time technician location tracking and automated voice and text appointment reminders
- Dispatch technicians using optimized routes and skills-based assignments and resources
- Send personalized surveys immediately after service calls with Microsoft Forms Pro—included with Dynamics 365 Field Service

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Field Service

Active Agreements

Agreement Number	Service Account	Start Date	End Date	System Status
00001	Blue Yonder Airlines	8/20/2018	8/19/2019	Active
00002	Blue Yonder Airlines	9/1/2018	8/31/2023	Estimate

All Customer Assets

Name	Account	Parent
BY Fire Alarm 1a	Blue Yonder Airlines	BY Fire Alarm System 322e
BY Fire Alarm 1c	Blue Yonder Airlines	BY Fire Alarm System 322e
BY Fire Alarm 2a	Blue Yonder Airlines	BY Fire Alarm System 122xD
BY Fire Alarm 2d	Blue Yonder Airlines	BY Fire Alarm System 322e
BY Fire Alarm System 122xD	Blue Yonder Airlines	
BY Fire Alarm System 322e	Blue Yonder Airlines	

Your technician, David is on the way. Estimated arrival time 10:45a.

Active Invoices

Invoice ID	Name	Status	Status Reason	Amount Due	Total Amount	Due Date	Created On
INV-01000-G7Q914	WO 1	Active	New	\$2,139.83	\$2,139.83	9/7/2018	8/20/2018 3:04 PM

Active Work Orders

Work Order Number	Primary Incident Description	Created On	Time Window Start	Closed On
00001	Install fire systems.	8/27/2018 5:21 PM	8/17/2018 0:09 AM	
00004	Check fire alarm batteries across systems.	8/27/2018 7:26 PM	8/30/2018 0:09 AM	
00006	Check fire alarm batteries across systems.	8/27/2018 7:35 PM	8/25/2018 0:09 AM	
00007	Check	8/28/2018	9/3/2018	



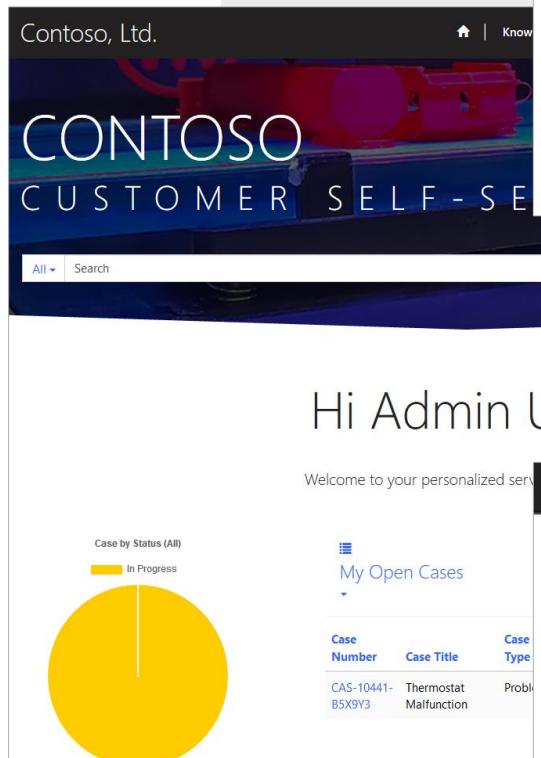
INTELLIGENT PLANNING

Multichannel customer engagement



Keep track of all service interactions

- Enable customers to open and track work order status, invoices, agreements, and assets
- Grant customer access to a knowledge base within the self-service portal to self-diagnose issues
- Empower customers to view and track work order data in real time
- Use a single portal to display content in multiple languages



Work Order Number	Primary Incident Description	Created On	Time Window Start	Closed On	System Status	Work Location
00009	Test Incident	2/27/2017 1:34 PM		2/27/2017 1:34 PM	Open - Unscheduled	On Site
00010	Test Incident	2/27/2017 1:44 PM		2/27/2017 1:44 PM	Open - Unscheduled	On Site
00011	Test Incident	2/27/2017 5:45 PM		2/27/2017 5:45 PM	Open - Unscheduled	On Site



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Service agreements and preventive maintenance



Generate preventive
work orders



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Agreements and preventive maintenance



Generate preventive work orders

- Track, manage, and monitor the maintenance needs of an asset based on the manufacturer's recommendations
- Set up customer agreements so you can automatically generate work orders and invoices based on future need
- Use machine learning models to enable preventive maintenance based on EAM data

The screenshot shows the Dynamics 365 Field Service application interface. The top navigation bar includes 'Dynamics 365', 'Field Service', 'Agreements', and 'New Agreement'. Below the navigation is a toolbar with 'SAVE', 'SAVE & CLOSE', 'NEW', 'FLOW', and 'FORM EDITOR'. The main content area is titled 'New Agreement' and shows the 'Agreement (Active)' screen. A red box highlights the 'ACTIVITIES' section, which displays a work order for 'Coho Winery (sample)' regarding a 'Thermastat port malfunction'. The work order details include a due date of '7/19/2019 8:00 AM' and is completed by 'Admin #'. The 'BOOKING SETUP' and 'INVOICE SETUP' sections are also visible on the right.

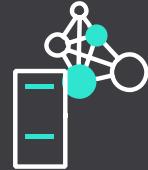


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Predictive maintenance enabled by IoT



Gain insights to
react quickly



Use IoT Central to
set alert rules



Increase
efficiency with
Azure IoT Hub



Monitor devices
remotely



Automate
maintenance



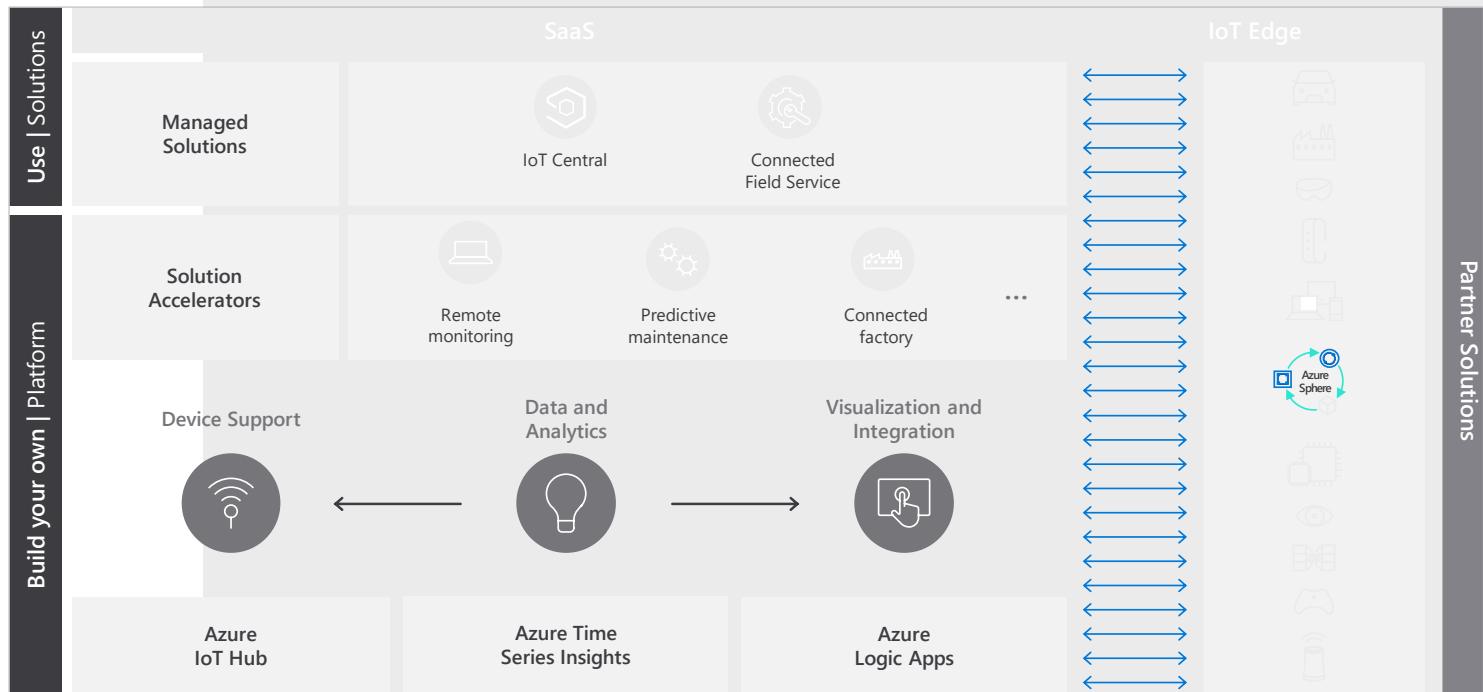
INTELLIGENT PLANNING

Predictive maintenance enabled by IoT



Gain insights to react quickly

- Enable real-time telemetry and interact with your customers' field environment
- Effectively integrate and support a wide array of Microsoft and third-party managed IoT devices
- Gain greater scale and efficiency
- Analyze and act on new data
- Integrate and transform business processes





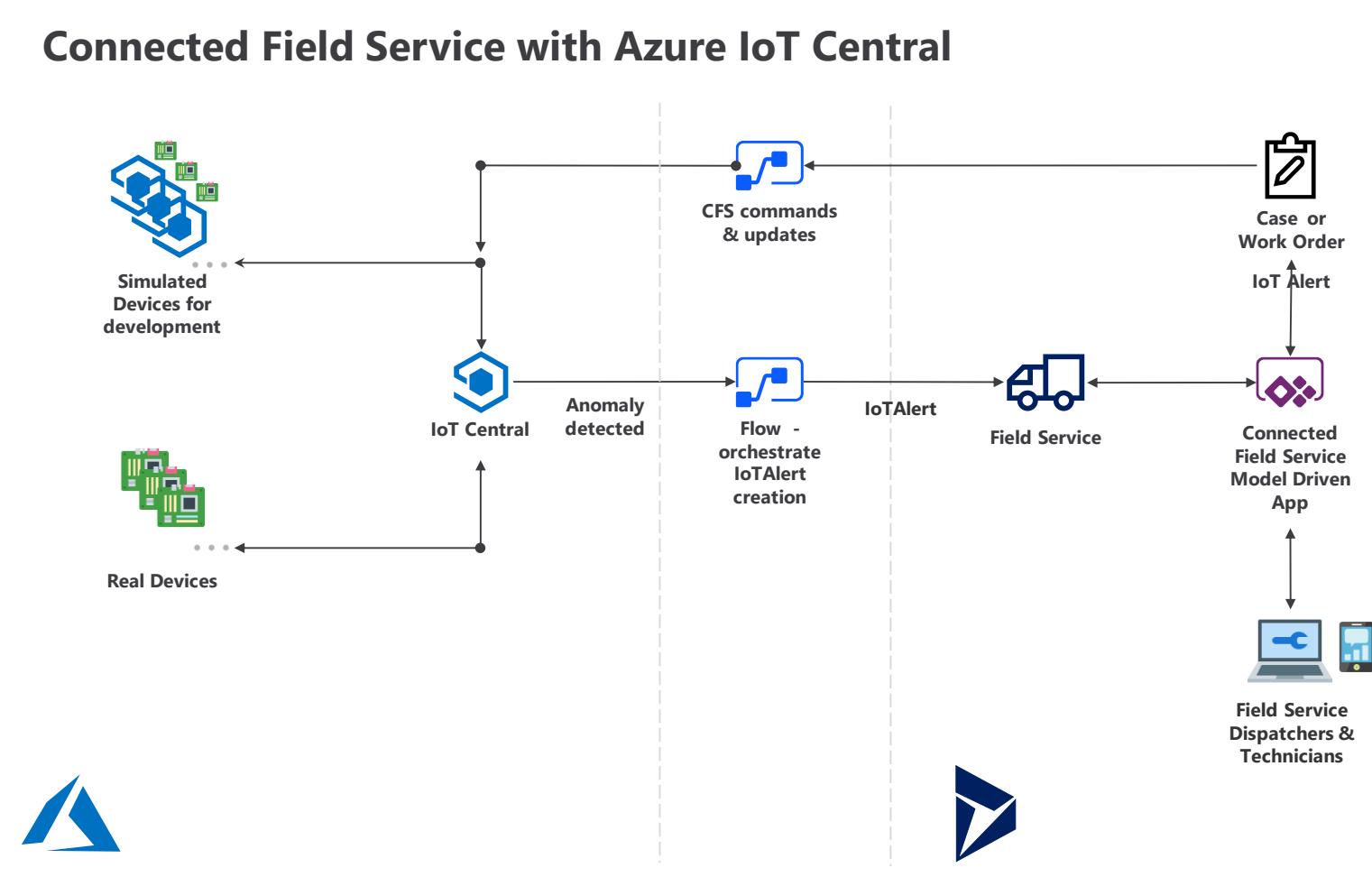
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Predictive maintenance
enabled by IoT



Use IoT Central to set alert rules

- Take advantage of a fully managed SaaS solution with Azure IoT Central
- Get started quickly with minimal IoT experience required





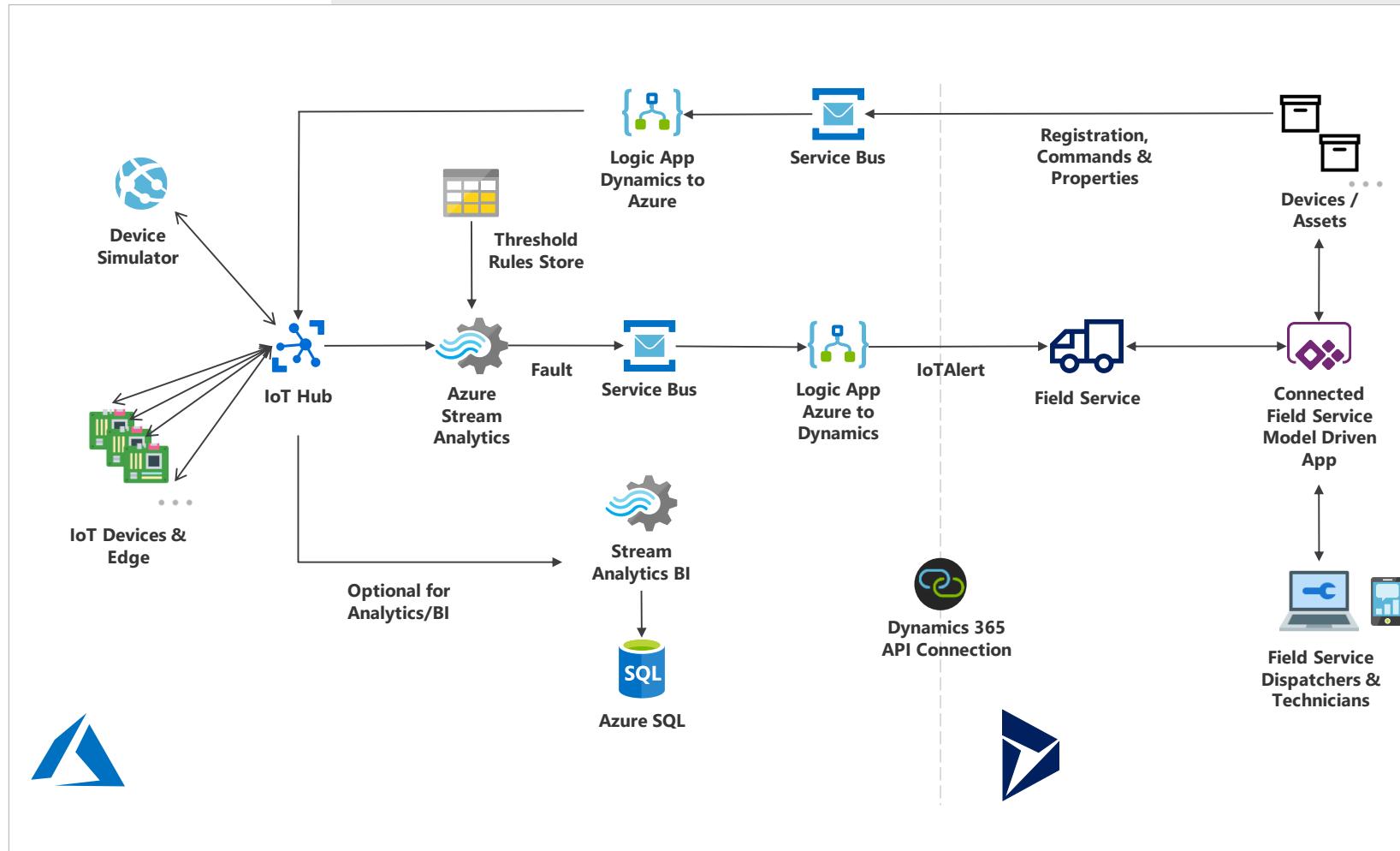
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Predictive maintenance enabled by IoT



Increase efficiency with Azure IoT Hub

- Azure IoT Hub enables businesses to connect, monitor, and manage billions of IoT assets
- Take advantage of an open, flexible cloud PaaS that supports open-source SDKs and multiple protocols





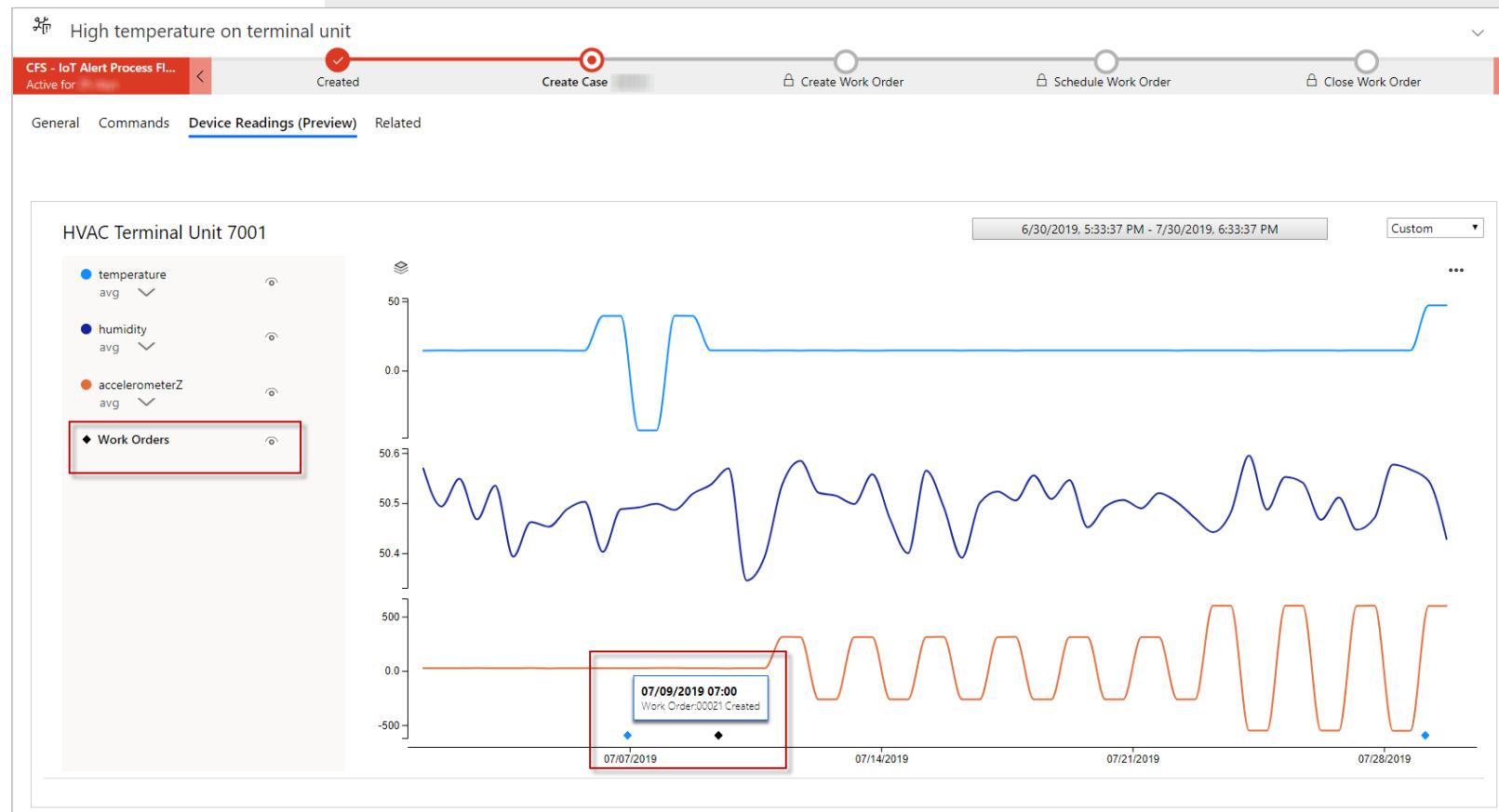
INTELLIGENT PLANNING

Predictive maintenance enabled by IoT



Monitor devices remotely

- Using the field service module, see and solve issues before clients are aware of them
- Reduce the number of service calls you receive by identifying and resolving issues before they occur
- With device telemetry and service maintenance data, make intelligent decisions around dispatching technicians with the right expertise, availability, and proximity to the job
- Create rules and configure Microsoft Flow to integrate IoT-connected devices with an active alert system to receive updates on specific device activity





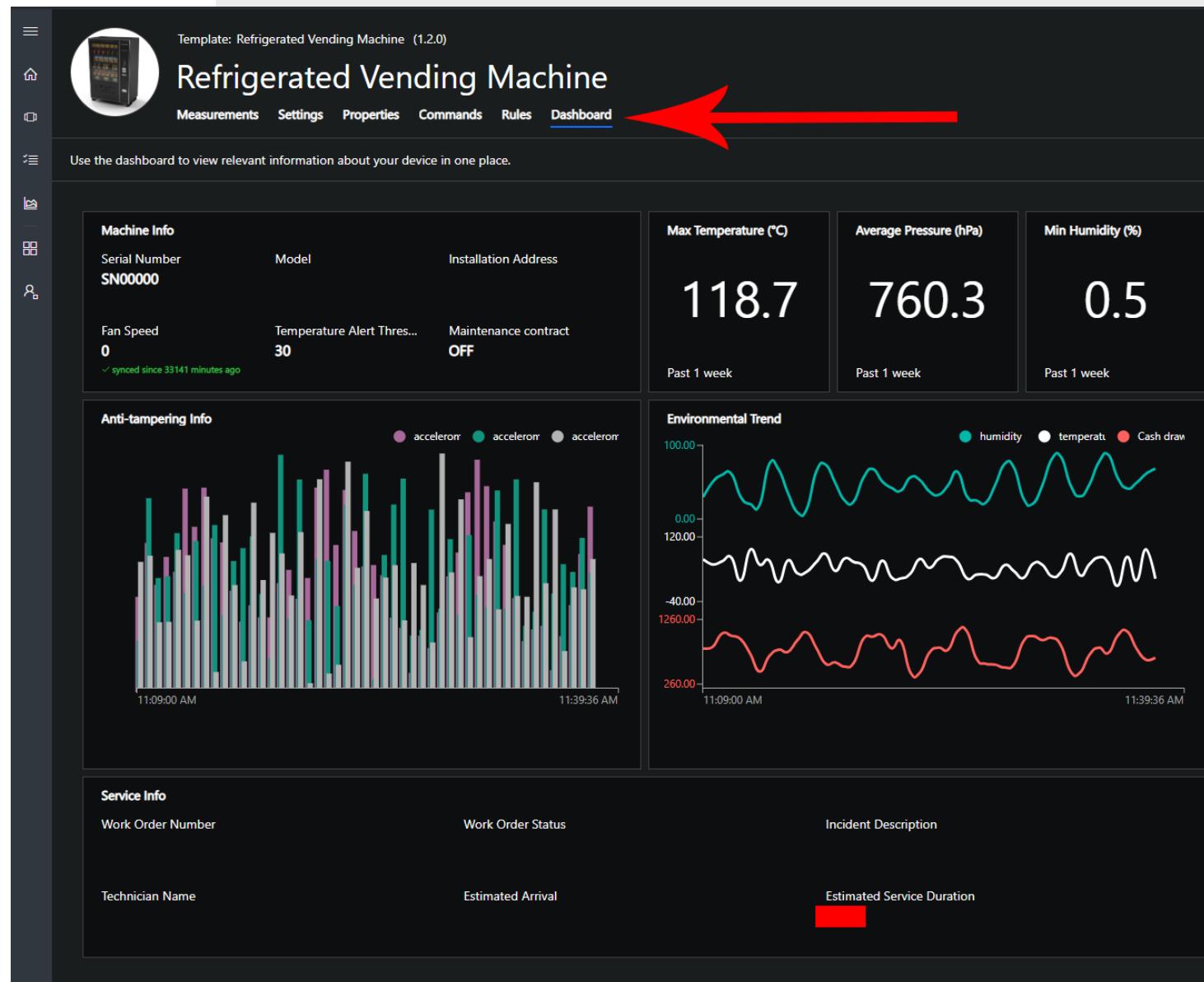
INTELLIGENT PLANNING

Predictive maintenance enabled by IoT



Automate maintenance

- Predict when a device needs attention and automate self-healing or maintenance steps before any kind of problem
- Use the remote monitoring dashboard to view telemetry from your connected devices, provision new ones, or upgrade firmware
- Visualize simulated devices on a map and respond to alerts
- View product usage, issues, and repair history from a central portal to diagnose problems and deliver predictive maintenance
- Get instant notifications and alerts about device health to automate the service-request generation process using predefined rules





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Proactive field service driven by machine learning



Optimize resource
management



Improve customer service
delivery capabilities



INTELLIGENT PLANNING

Proactive field service driven by machine learning



Optimize resource management

- Optimize resource assignments using multiple factors, such as a technician's experience in handling the specific failure, the customer's preferred technician, or proximity to the site
- Automatically assign the work order to the best available personnel
- Create the most efficient travel path for technicians, optimizing their schedules and allowing them to perform additional calls per day
- Using real-time inventory management, ensure that the replacement part is available on the scheduled date and that the technician has access to the tools needed to complete the job

The screenshot displays the Dynamics 365 Resource Scheduling interface. At the top, a navigation bar shows 'Dynamics 365', 'Resource Sched...', 'Optimization Admin...', 'Optimize WA Jobs', and various action buttons like 'PUBLISH', 'RUN NOW', 'SCHEDULE BOARD', 'NEW', 'DELETE', 'ASSIGN', 'SHARE', 'EMAIL LINK', 'RUN WORKFLOW'. Below the navigation is a sub-header 'OPTIMIZATION SCHEDULE' and 'Optimize WA Jobs'. The main area is divided into several sections:

- General:** A form with fields for 'Name' (Optimize WA Jobs), 'Scope' (0_WA Jobs), 'Goal' (Maximize working hrs for WA), 'Status' (Published), 'Last Publish Date' (2/5/2018 4:55 PM), 'Run as simulation' (Yes), 'Schedule' (Timer: 15 minutes, Timer Mode: After Job Completion, Valid From: 1/30/2018 8:00 AM, Valid To: 2/1/2018 8:00 AM, Next Scheduled Run At: 2/2/2018 2:22 PM), and a 'Filter' section.
- Scheduling Optimization Requests:** A table showing completed and canceled optimization requests with details like creation and modification dates, messages, and request IDs.
- Hours & Map View:** A list of technicians with their names, availability, and completion percentages. A 'Search resources...' input field is at the top.
- Calendar View:** A grid for 2/5/2018 showing work orders (e.g., Work Order - 00254, Duration: 2 hrs 7 min) and their start and end times. A legend indicates that solid blue colors represent baseline bookings.
- Booking Requirements:** A table showing work order details and requirements.
- Details:** A panel on the right showing 'Optimize in 0_WA Jobs' with 'From' (2/2/2018) and 'To' (2/6/2018) dates, and a 'Run now' button.
- Simulation bookings:** A table showing completed, canceled, and simulated optimization results.



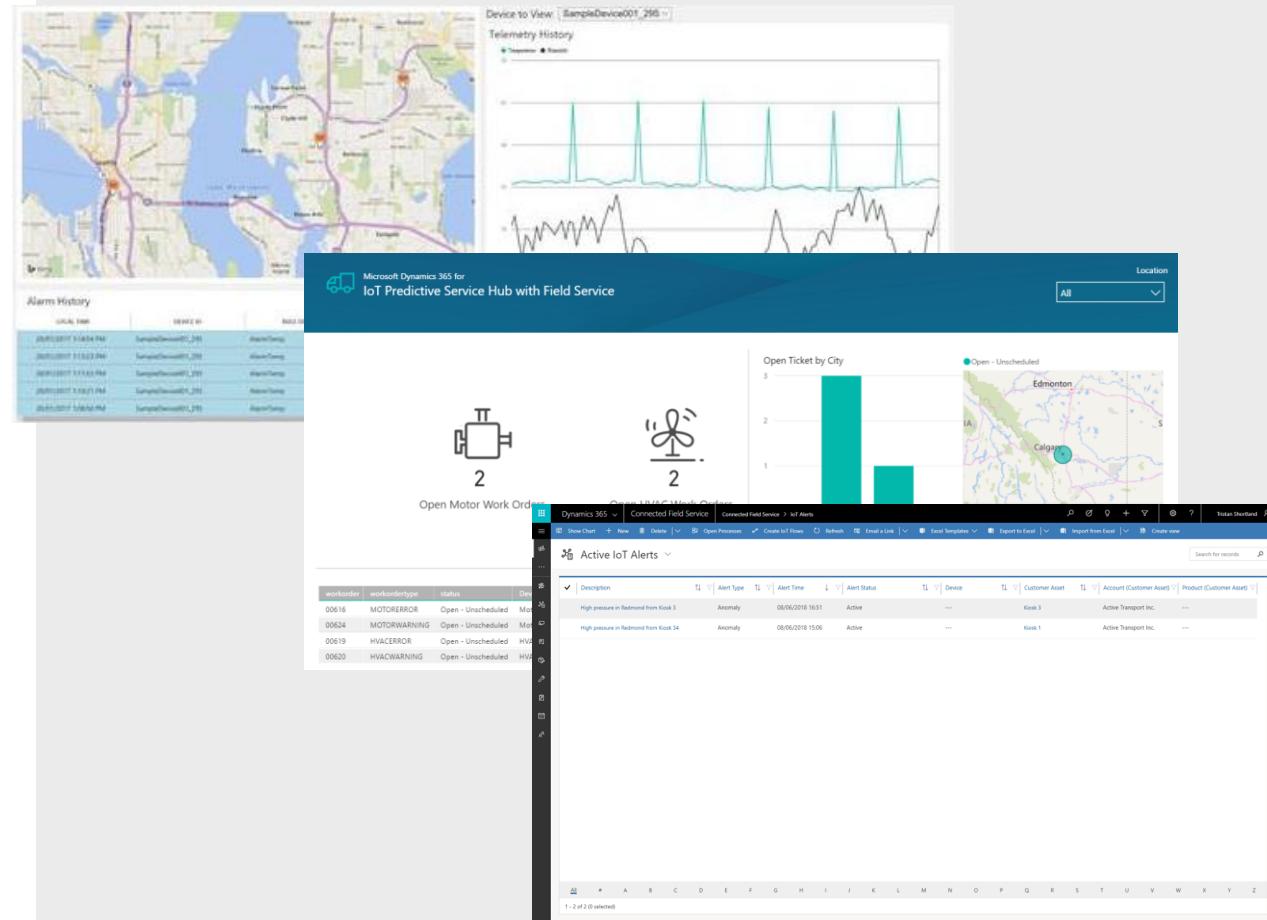
INTELLIGENT PLANNING

Proactive field service driven by machine learning



Improve customer service delivery capabilities

- Allow for automated, remote self-healing and predictive forecasting, monitoring, and analyzing connected devices for potential issues
- Using historical device data and predictive analytics, get system recommendations for scheduling technician site visits, heading off future problems and notifying the customer of the work order
- Using recommendations from the system, enable technicians to discuss additional products and services during site visits that meet their customers' specific usage and operating needs

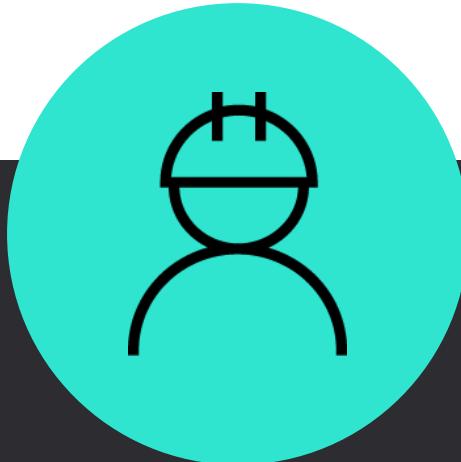


A focused approach to connected field service



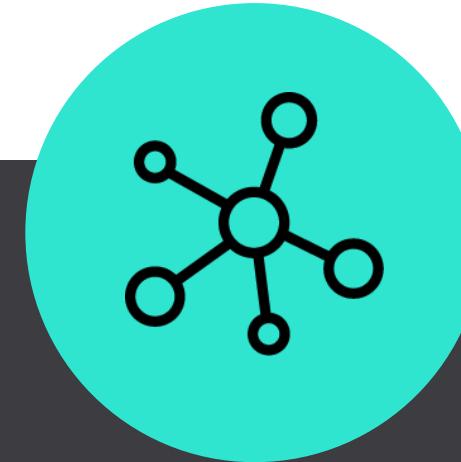
Intelligent planning

- Effectively plan and manage customer demands across all channels
- Efficiently manage service agreements and preventive maintenance



Empowered agents and technicians

- Empower agents and technicians with tools to manage and solve cases
- Assist customers virtually with elevated training and guidance



Technology unification

- Integrate and unify data, systems and apps to automate and manage complex business processes
- Gain real-time insights and visualization



Empowered agents and technicians

- Right people at the right time
- Effective asset and inventory management
- Active remote support of field technicians
- Expert guidance and technician training plus enablement



EMPOWERED AGENTS
AND TECHNICIANS

Right people at the right time



Enable smart
scheduling and routing



Automate and
improve scheduling



EMPOWERED AGENTS AND TECHNICIANS

Right people at the right time



Enable smart scheduling and routing

- Assign resources to jobs and tasks based on location and need
- Ensure the right resources are assigned to customers at the right time and optimize resources to fit in the most appointments per day
- Schedule work orders for the most appropriate resources by optimizing bookings for the shortest travel time, available work hours, and more



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Right people at the right time



Automate and improve scheduling

- With Dynamics 365 Field Service, support the degree of automated scheduling automation that fits your needs
- Enhance manual scheduling using the schedule board to select requirements and create bookings
- Through the Schedule Assistant tool, take advantage of a semi-automated approach using available recommendations and most appropriate resources
- Using Resource Scheduling Optimization (RSO), automate the scheduling of your workforce, setting objectives such as "minimize travel time" and "maximize working hours"

Manual scheduling

Scheduling Assistant

Resource Scheduling Optimization (RSO)

Detailed description of the RSO interface:
The interface shows a map of Seattle with a red route line plotted through various service locations. On the right, a grid of booking slots is displayed for multiple agents. The grid columns represent time slots from 7:00 AM to 11:00 PM. The rows represent different agents. Each slot is color-coded and contains a booking summary. At the bottom, there is a table titled "Booking Requirements" with columns for ID, Project, Unscheduled Work Order, Case, Work Order, Service Account Work Order, Is Primary, Name, Schedule, and Status. The "Schedule" column shows the status of each booking as "Optimize".



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Effective asset and inventory management

-  Asset and inventory
management
- 



EMPOWERED AGENTS AND TECHNICIANS

Effective asset and inventory management



Asset management

- Upload 3D knowledge articles and models of assets for field technicians to reference in the field
- Review work order history per asset using IoT device information
- Access multi-layer device hierarchy with links to product catalog for product trends

The screenshot displays the Dynamics 365 Field Service application interface. The top navigation bar shows 'Dynamics 365', 'Field Service', 'Field Service > Customer Assets > Surface'. The main view shows a 'Customer Asset: Customer Asset' record for 'Surface'. The 'Related' tab is selected. A sidebar on the right lists 'Related' sections: 'Related - Details' (Child Assets, Related Assets), 'Related - Common' (Activities, Connections), 'Related - 3D Models' (3D Models), and 'Related - Others' (Work Order Incidents, Work Order Products, Work Order Services, Work Order Service Tasks). A yellow box highlights the '3D Models' section. Below this, a 'THREE-DIMENSIONAL MODEL' for 'Surface' is shown with a 'General' tab selected. The 'Timeline' section is empty. A note is present: 'Name: Surface, Storage Type: Note Attachment'. A yellow box highlights the note content. To the right, a '3D Model Associated View' is shown with a '3D Models' tab selected, containing an 'Add Existing 3D Model' button. A yellow box highlights this button. At the bottom, a laptop screen displays a 3D model of a bird.



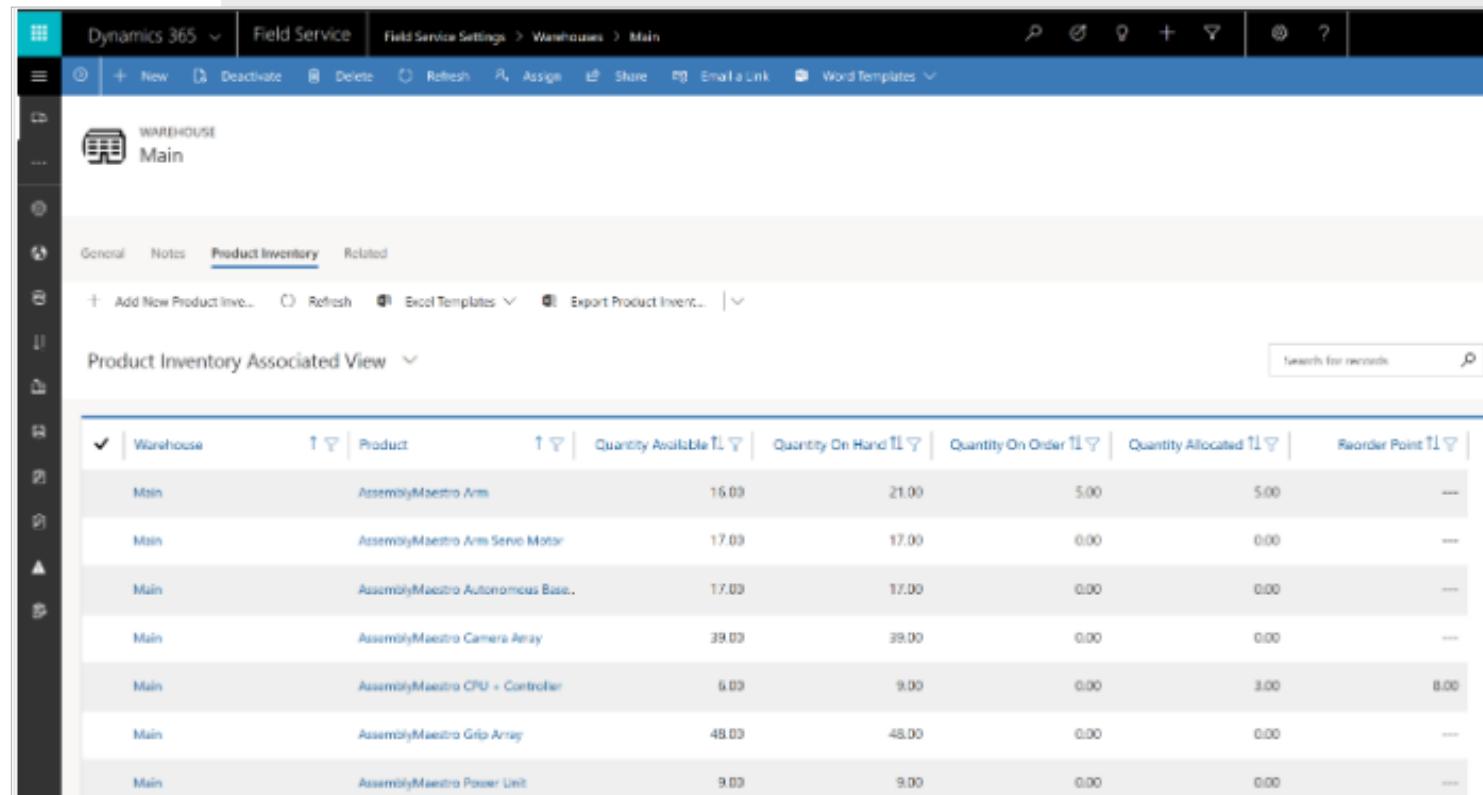
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Effective asset and inventory management



Inventory management

- Accurately track service stock at mobile and fixed locations, including available, on hand, on order, and allocated inventory
- Manage updates and stock history for any location, including truck stock
- Manage inventory information for transactions including requests, return material authorizations (RMA), a return to vendor (RTV), stock adjustments, or transfers
- Use the ship-via option to specify different shipping methods used by your company



Warehouse	Product	Quantity Available	Quantity On Hand	Quantity On Order	Quantity Allocated	Reorder Point
Main	AssemblyMaestro Arm	16.00	21.00	5.00	5.00	---
Main	AssemblyMaestro Arm Servo Motor	17.00	17.00	0.00	0.00	---
Main	AssemblyMaestro Autonomous Base..	17.00	17.00	0.00	0.00	---
Main	AssemblyMaestro Camera Array	39.00	39.00	0.00	0.00	---
Main	AssemblyMaestro CPU + Controller	6.00	9.00	0.00	3.00	8.00
Main	AssemblyMaestro Grip Array	48.00	48.00	0.00	0.00	---
Main	AssemblyMaestro Power Unit	9.00	9.00	0.00	0.00	---



EMPOWERED AGENTS
AND TECHNICIANS

Active remote support of field technicians



Deploy the Field
Service mobile app



Solve problems faster
the first time



EMPOWERED AGENTS AND TECHNICIANS

Active remote support of field technicians



Deploy the Field Service mobile app

- Give field technicians the information they need to get to a customer location and complete work orders quickly
- Effectively capture and update all work order details through full offline capabilities
- Customize the app to function as barcode scanner, RFID, and credit card reader
- Use GPS functionality to help schedule work orders to the closest available field technician, calculating arrival times to customer locations, and geofencing
- Take pictures of completed work for attaching to invoices, helping with resolution tracking, or training purposes in the future

Work Order Screen (Left):

Name	00172
Work Order	00172
Booking Status	Traveling
Start Time	In Progress
Actual Arrival Time	On Break
End Time	Scheduled
Duration	Simulation -
Miles Traveled	Traveling
Actual Travel Duration	
Total Cost	
Resource	Allen Contoso
Currency	US Dollar

Product Details Screen (Right):

Product	ArmBand 100
Name	ArmBand 100
Barcode	
Account	Contoso Pharma...
Parent Asset	Click To Select
Name	ArmBand 100



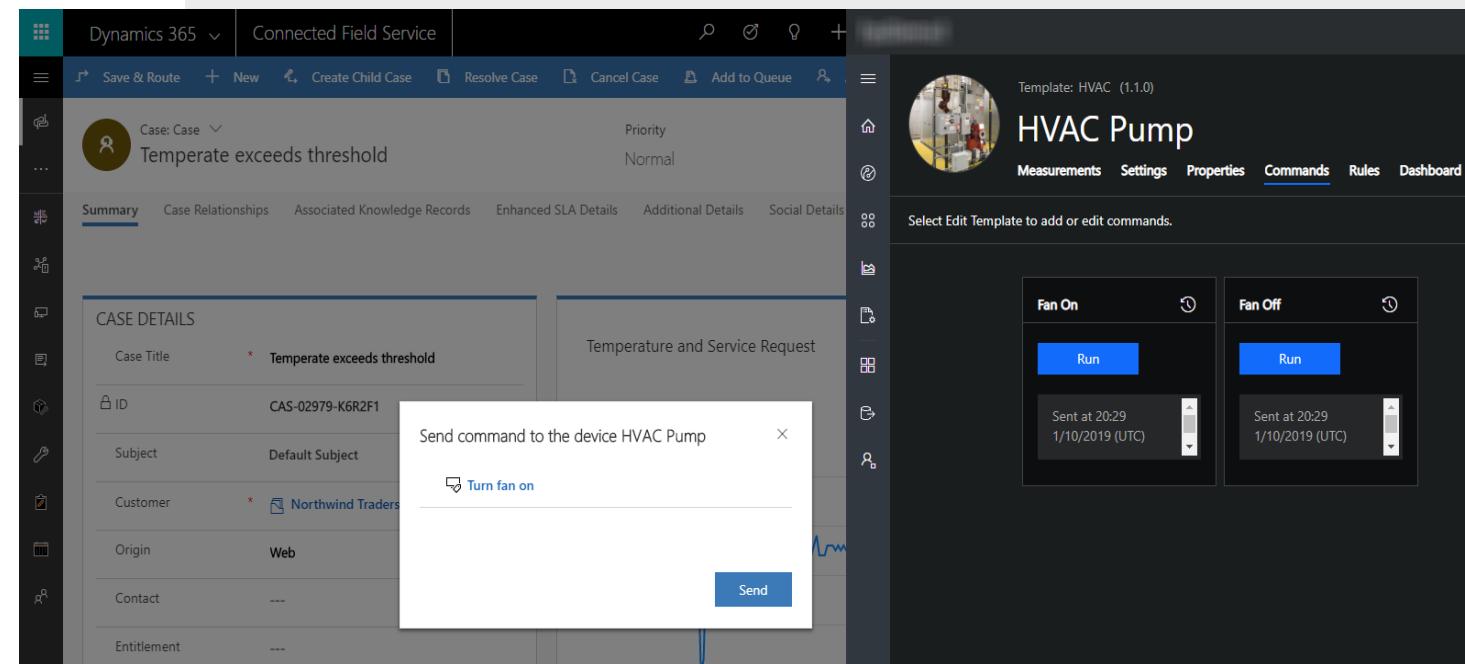
EMPOWERED AGENTS AND TECHNICIANS

Active remote support of field technicians



Solve problems faster the first time

- Remotely assist and engage with customers from virtually anywhere in the world using Remote Assist and Microsoft Teams in either HoloLens or an Android mobile device
- With heads-up, hands-free video calling on HoloLens, first-line workers can collaborate with remote experts on PC or mobile to troubleshoot issues in context
- Virtualize the customer perspective to provide detailed guidance on complex systems
- Enable field service technicians to monitor assets and send commands remotely to assist customers on the spot



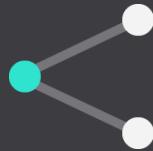


EMPOWERED AGENTS
AND TECHNICIANS

Expert guidance and technician training plus enablement



Offer expert guidance with service using annotations or files



Integrate training augmented reality and artificial intelligence into training



Provide interactive environments for visualizing products



EMPOWERED AGENTS AND TECHNICIANS

Expert guidance and technician training plus enablement



Offer expert guidance with service using annotations or files

- Enable external access through Microsoft Teams to collaborate with customers from different organizations or domains
- Allow users to make or receive calls from guest contacts with Dynamics 365 Remote Assist on Microsoft HoloLens
- Use edit mode to make annotations within the contact's virtual space from the mixed reality toolbar
- Link files or draw arrows to highlight key areas of focus during the remote session, providing detailed instruction and deep understanding of solutions

Create your team

Collaborate closely with a group of people inside your organization based on project, initiative, or common interest. [Watch a quick overview](#)

Team name

Remote Assist

Description

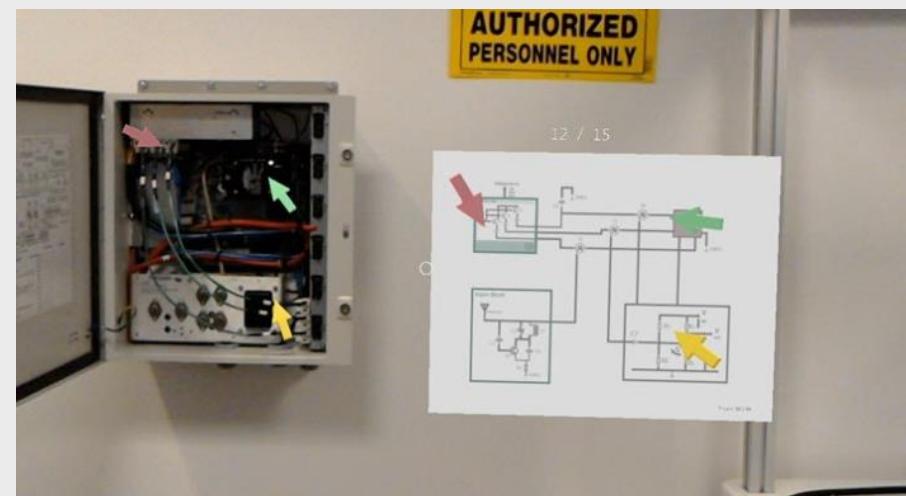
Using this channel to make Remote Assist calls

Privacy

Private - Only team owners can add members

Create a team using an existing team as a template

[Cancel](#) [Next](#)





EMPOWERED AGENTS AND TECHNICIANS

Expert guidance and technician training plus enablement



Integrate augmented reality and artificial intelligence into training

- Using Dynamics 365 Guides, an augmented reality tool, provide employees with an understanding of how to apply learnings in common scenarios
- Create interactive content through Guides that employees can revisit to gain a deep understanding of core subjects, view 3D models, and get hands-on training
- Provide step-by-step instructions that guarantee quality and consistency of work across the team





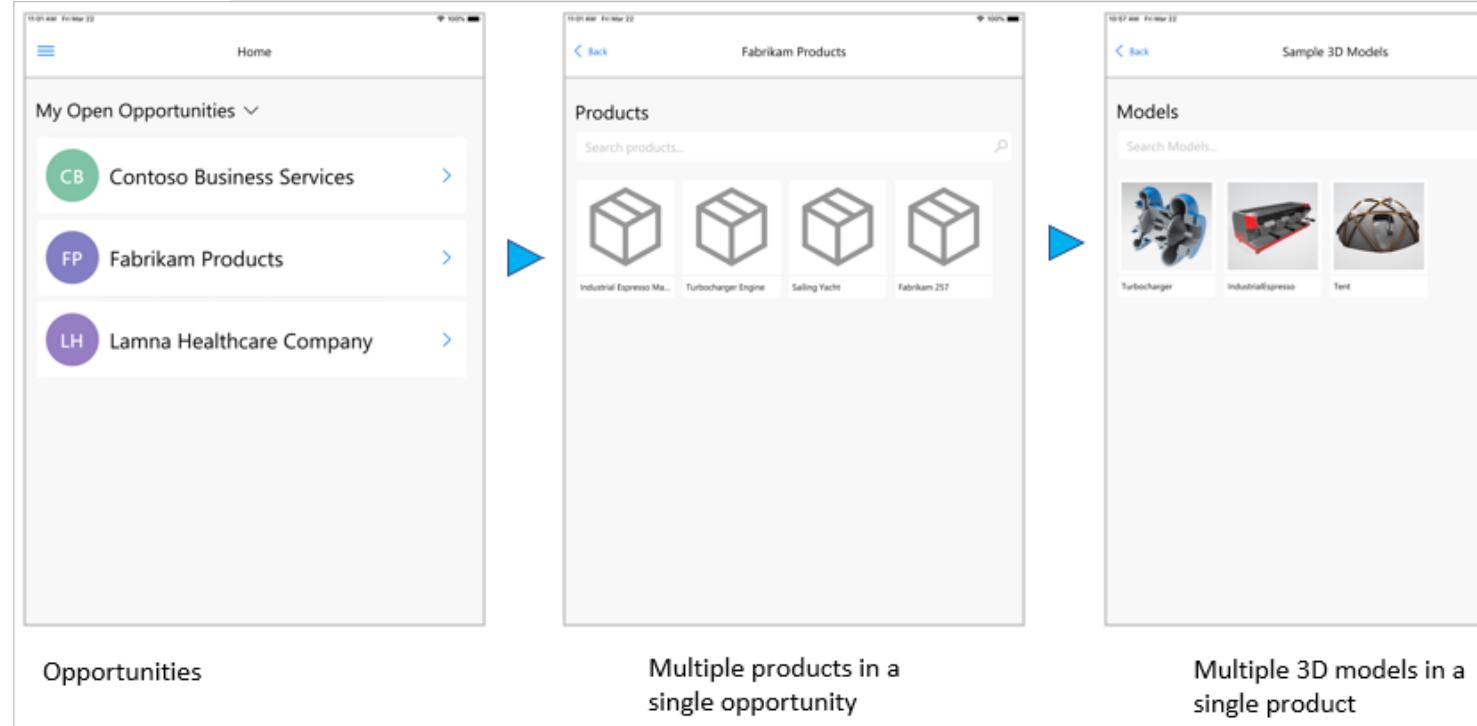
EMPOWERED AGENTS AND TECHNICIANS

Expert guidance and technician training plus enablement



Provide interactive environments for visualizing products

- Give customers a mixed reality view with Dynamics 365 Product Visualize, which visually represents products in granular detail
- Display 3D models of products to show customers how a product will fit into their environment
- Make notes and adjustments to models in real time while engaging with the customer
- Ensure a confident purchase by addressing the customer's questions or concerns about key components during the mixed reality display



A focused approach to connected field service



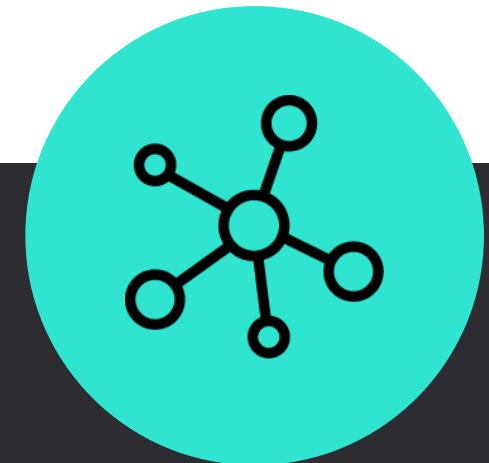
Intelligent planning

- Effectively plan and manage customer demands across all channels
- Efficiently manage service agreements and preventive maintenance



Empowered agents and technicians

- Empower agents and technicians with tools to manage and solve cases
- Assist customers virtually with elevated training and guidance



Technology unification

- Integrate and unify data, systems and apps to automate and manage complex business processes
- Gain real-time insights and visualization



Technology unification

- Enhance productivity with unified data, advanced reporting, custom analytics, and data visualization
- Optimize current solutions with the power of integration and automation
- Support clients on their terms with channel integration



TECHNOLOGY
UNIFICATION

Enhance productivity with unified data, advanced reporting, custom analytics, and data visualization



Unify data with the
Common Data Service



Analyze and visualize data
using Microsoft Power BI



Enhance productivity with unified data, advanced reporting, custom analytics, and data visualization



Unify data with the Common Data Service

- Improve ease and accuracy of planning and reporting through a unified source of truth
- Streamline machine learning, and improve reporting and apps using Power Query
- Build rich applications with PowerApps
- Automatically apply business rules and logic already defined in your customer service to your PowerApps
- Get a secure and cloud-based storage option for your data with role-based security to control access

Entity	Name	Type	Tags
Account	account	Standard	Master
Action Approval Model	msdyn_flow_actionapprovalmodel	Custom	Custom
Address	customeraddress	Standard	Standard
AI Configuration	msdyn_aiconfiguration	Custom	Custom
AI Form Processing Document	msdyn_aifptrainingdocument	Custom	Custom
AI Model	msdyn_aimodel	Custom	Custom
AI Object Detection Bounding Box	msdyn_aiodetectionboundingbox	Custom	Custom
AI Object Detection Image	msdyn_aiodimage	Custom	Custom
AI Object Detection Image Mapping	msdyn_aiodtrainingimage	Custom	Custom
AI Object Detection Label	msdyn_aiodlabel	Custom	Custom
AI Template	msdyn_aitemplate	Custom	Custom
Analysis Component	msdyn_analysiscomponent	Custom	Custom
Analysis Job	msdyn_analysisjob	Custom	Custom
Analysis Result	msdyn_analysisresult	Custom	Custom
Analysis Result Detail	msdyn_analysisresultdetail	Custom	Custom
Appointment	appointment	Standard	Productivity
Approval	msdyn_flow_approval	Custom	Custom
Approval Request	msdyn_flow_approvalrequest	Custom	Custom
Approval Response	msdyn_flow_approvalresponse	Custom	Custom
Attachment	activitymimeattachment	Standard	Productivity
Await All Action Approval Model	msdyn_flow_awaitallactionapprovalmodel	Custom	Custom
Await All Approval Model	msdyn_flow_awaitallapprovalmodel	Custom	Custom
Basic Approval Model Data	msdyn_flow_basicapprovalmodel	Custom	Custom
Business Unit	businessunit	Standard	Standard
Component Layer	msdyn_componentlayer	Custom	Custom
Component Layer Data Source	msdyn_componentlayerdatasource	Custom	Custom
Connection Setting	msdyn_connectionsetting	Custom	Custom
Connector	msdyn_connector	Custom	Custom



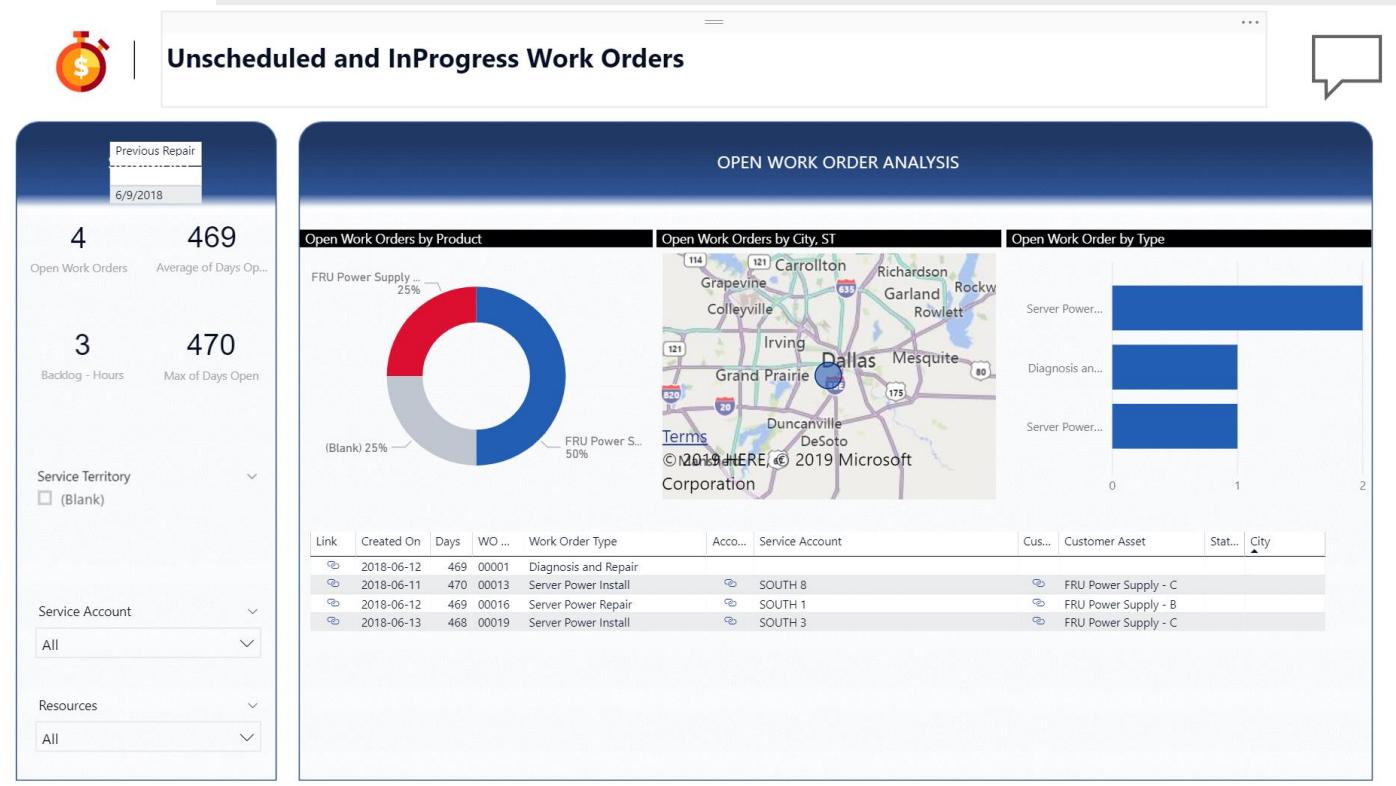
TECHNOLOGY UNIFICATION

Enhance productivity with unified data, advanced reporting, custom analytics, and data visualization



Analyze and visualize data using Microsoft Power BI

- Enable field service managers and dispatchers to analyze and visualize data, drawing useful insights to help with better decisions and corrective actions
- Use templates with pre-built data model, reports, and dashboards
- Take advantage of easy-to-use dashboards, interactive reports, and compelling visualizations





TECHNOLOGY
UNIFICATION

Optimize current solutions with the power of integration and automation



Automate business workflows with Microsoft Flow



Collaborate using templates and connectors



Integrate applications via Microsoft AppSource



Optimize current solutions with the power of integration and automation



Automate business workflows with Microsoft Flow

- Integrate with pre-built Flow templates for frequently used applications to track and respond to events as they happen
- Automate manual tasks without a single line of code by plugging Flow into Dynamics 365 Field Service
- Use Flow to assign new tasks automatically in the Field Service workflow
- Integrate Microsoft PowerApps with Flow to trigger workflows from within apps, or combine PowerApps with Microsoft Power BI to drive business analytics on your data

Flow

Received Sent History

You don't have any pending requests at this time.

Create an approval flow

Add a ready-to-use approval flow or create your own from blank.

Learn more about creating an approval flow

Create approval flow See how approvals work

Start with one of these popular templates

Start approval when a new item is added

Send approval and follow up via email

Request manager approval for a selected file

Search all approval templates



TECHNOLOGY UNIFICATION

Optimize current solutions with the power of integration and automation



Collaborate using templates and connectors

- Easily work with Field Service info, share files directly from Teams, and integrate and sync files automatically
- Manage a single set of user identities and credentials in both your Azure Active Directory domain and Dynamics 365 Customer Service
- Get up and running quickly with built-in features and integrations with Microsoft platforms your organization is already familiar with

The screenshot shows the Microsoft Flow interface. The left sidebar includes Home, Approvals, My flows, Templates, Connectors, Data, AI Builder (preview), Solutions, and Learn. The main area displays a grid of automation templates. A search bar at the top right shows 'sentiment'. Filter buttons include All flows, Featured, Shared with me, Approval, Button, Data collection, Visio, Email, Events and calendar, Mobile, and ...

Some visible templates include:

- Run sentiment analysis on tweets and push results to a Power BI dataset (By Microsoft, Used 1610 times)
- Notify me about negative Twitter posts (By Microsoft, Used 211 times)
- Notify me about negative Yammer posts (By Microsoft, Used 204 times)
- Process Tw Sentiment (By Microsoft Community, Used 126 times)
- Receive Push Notifications for negative emails in Outlook 365 (By Microsoft Flow Community, Used 83 times)
- Notify me about negative Disqus posts (By Microsoft, Used 24 times)
- Alert the team if a record is created in Dynamics 365 (By Microsoft, Used 16 times)
- Record a tv (By Microsoft, Used 16 times)

A detailed view of a template shows a flow diagram with steps: Office 365 Outlook → Text Analytics, Notifications, and Dynamics 365. The description states: "When a new email arrives in Office 365 Outlook, check the sentiment of the email using Text Analytics. If sentiment is negative then send me a push notification and create a task in Dynamics 365." The flow connects to Office 365 Outlook, Text Analytics, and Notifications.



TECHNOLOGY UNIFICATION

Optimize current solutions with the power of integration and automation



Integrate applications via Microsoft AppSource

- Add new capabilities to your existing field service solutions to meet your business needs
- Use applications tailored to the field service industry that work with Dynamics 365 and align to the common data service
- Try any app for free before you buy

Find the right app for your business needs
Get solutions tailored to your industry that work with the products you already use

Search Microsoft AppSource

Refine by category

- Analytics 24
- Artificial intelligence 176
- Collaboration 80
- Customer service 197
- Finance 142
- Human resources 54
- IT + administration 129
- Internet of things 38
- Marketing 235
- Operations + supply chain 194
- Productivity 244
- Sales 353

Refine by industry

- Agriculture 13
- Education 10
- Distribution 282
- Financial services 126
- Government 34
- Health 30
- Manufacturing 365
- Professional services 86
- Retail 194

Refine by product

- Web Apps 92
- Dynamics 365 99
- Office 365
- Power BI apps 1

Microsoft | AppSource Apps

Search Microsoft AppSource

Products

Web Apps

Add-Ins

Dynamics 365 >

- Business Central
- Customer Service
- Field Service
- Finance & Operations
- Project Service Auto...
- Sales

Office 365

Power BI apps

Power BI visuals

Dynamics NAV

Trials

Pricing Model

Ratings

All All All

Dynamics 365 for Field Service

Deliver a seamless, end-to-end service experience. Built-in intelligence helps you resolve service issues before they occur, reduce operational costs, and deliver positive onsite experiences.

Get Dynamics 365 for Field Service >

Field Service x Dynamics 365 x Add-Ins x

Categories

Analytics

App results (594) View consulting services (59)

Reset category filters



TECHNOLOGY
UNIFICATION

Support clients on their terms with channel integration



Bring your
own channels

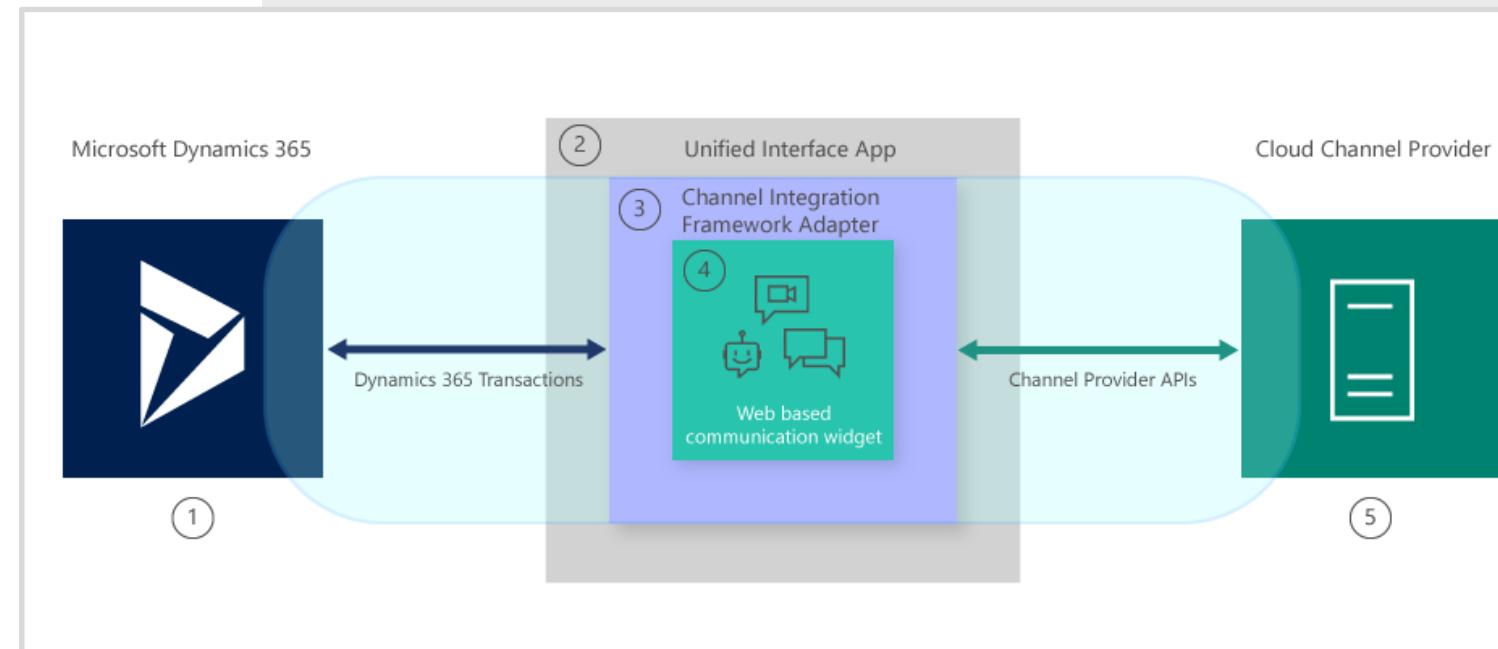


Support clients on their terms
with channel integration



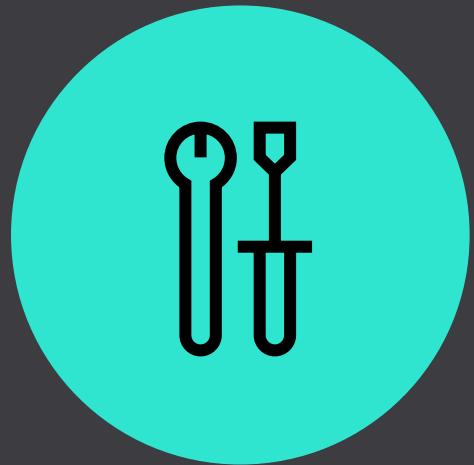
Bring your own channels

- Bring your own third-party channel providers with the Channel Integration Framework, which is agnostic for all JavaScript-based widgets
- Through two-way communication, support inbound and outbound according to your business and process workflows
- Extend and customize within Dynamics 365

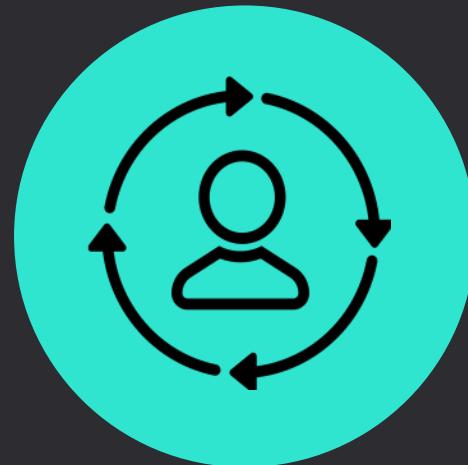


An adaptable approach to proactive field service

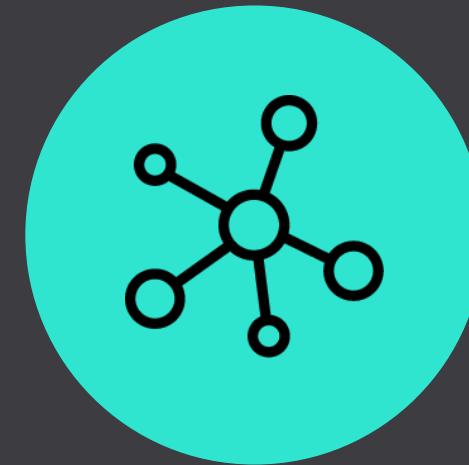
Core



Extended



Advanced



Field service automation

Effectively plan and manage your field service workforce

Connected field service

Improve field processes, customer engagement, and effectiveness

Extensions to connected field service

Extend and automate with artificial intelligence, intelligent connectors and apps

Core



Empower every agent

Dynamics 365 Field Service

- Work order management
- Scheduling and dispatch tools
- Communication tools
- Asset management
- Inventory, purchasing, and returns capabilities
- Billing capabilities
- Time tracking



Benefits

- Stay up to date with work orders from creation to closing
- Automatically schedule to align right job skills and best location to get more appointments per day
- Enhance collaboration between customer service agents, technicians, and more
- Effectively track customer equipment and service history
- Easily manage stock, purchase orders, fulfilment requests, and product returns
- Auto-generate invoices based on services delivered to customers
- Accurately track time taken by resources on work, traveling, and break

Extended



Connected field service

- Self-service portals
- Preventive maintenance
- Easy-to-use mobile application
- Analytics for reporting

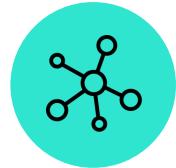


Benefits

- More personalized portal experience for employees and customers
- Moving from costly scheduled maintenance plans to just-in-time predictive maintenance
- Customizable and extensible mobile app to meet the field service worker's needs
- Gaining deep insights into KPIs to better manage field service and customer engagement

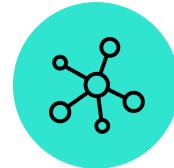


Advanced



Extend and automate with artificial intelligence, intelligent connectors and apps

- Integration with IoT platform
- Dynamics 365 Remote Assist on Microsoft HoloLens
- Integrate with augmented reality and artificial intelligence
- Dynamics 365 Product Visualize



Benefits

- Build your own connected field service solution that integrates IoT data with Dynamics 365
- Virtualize physical environment to share what you see to the remote team for assistance
- Walk multiple sites without being on location, getting a real-time view of a problem to troubleshoot efficiently
- Give your customers a more accurate representation of your products with 3D models



ADAPTABLE IMPLEMENTATION



Core

Field service automation

- Work order management
- Scheduling and dispatch tools
- Communication tools
- Asset management
- Inventory, purchasing, and returns capabilities
- Billing capabilities
- Time tracking



Extended

Connected field service

- Self-service portals
- Preventive maintenance
- Easy-to-use mobile application
- Analytics for reporting



Advanced

Extensions to connected field service

- Integration with IoT platform
- Dynamics 365 Remote Assist on Microsoft HoloLens
- Integrate with augmented reality and artificial intelligence
- Dynamics 365 Product Visualize

Next steps





Take the next step

Get started with Dynamics 365 Field Service—empower your digital transformation through applying intelligence and connecting your data.

Lean on the next generation of business applications with trusted Microsoft cloud services.

[Dynamics 365 learning paths](#)

[Dynamics 365 Field Service](#)



Microsoft Dynamics 365