

# Field Service Pro

Enhanced components of Microsoft Dynamics 365 Field Service

# Field Service Pro

The solution pack aims to enhance field service operations by leveraging enhanced plug & play components, advanced technologies and comprehensive solutions. This solution focuses on providing end-to-end services, including consulting, implementation, and managed services, to ensure efficient and effective field service management which emphasize agility and satisfaction in a dynamic market.

## Challenges

- Managing multiple systems (e.g., ESRI GIS, IoT, and financial systems) create complexity in integration, leading to data silos, inconsistency, and delay.
- Lack of a streamlined process for managing work orders, inspections, partners, budget, resource allocation and maintenance activities.
- Difficulty in real-time monitoring tracking and dispatching field service personnel. Requires complex workflows and continuous monitoring of performance.
- Inadequate offline capabilities for field service technicians, especially in remote areas with limited connectivity.

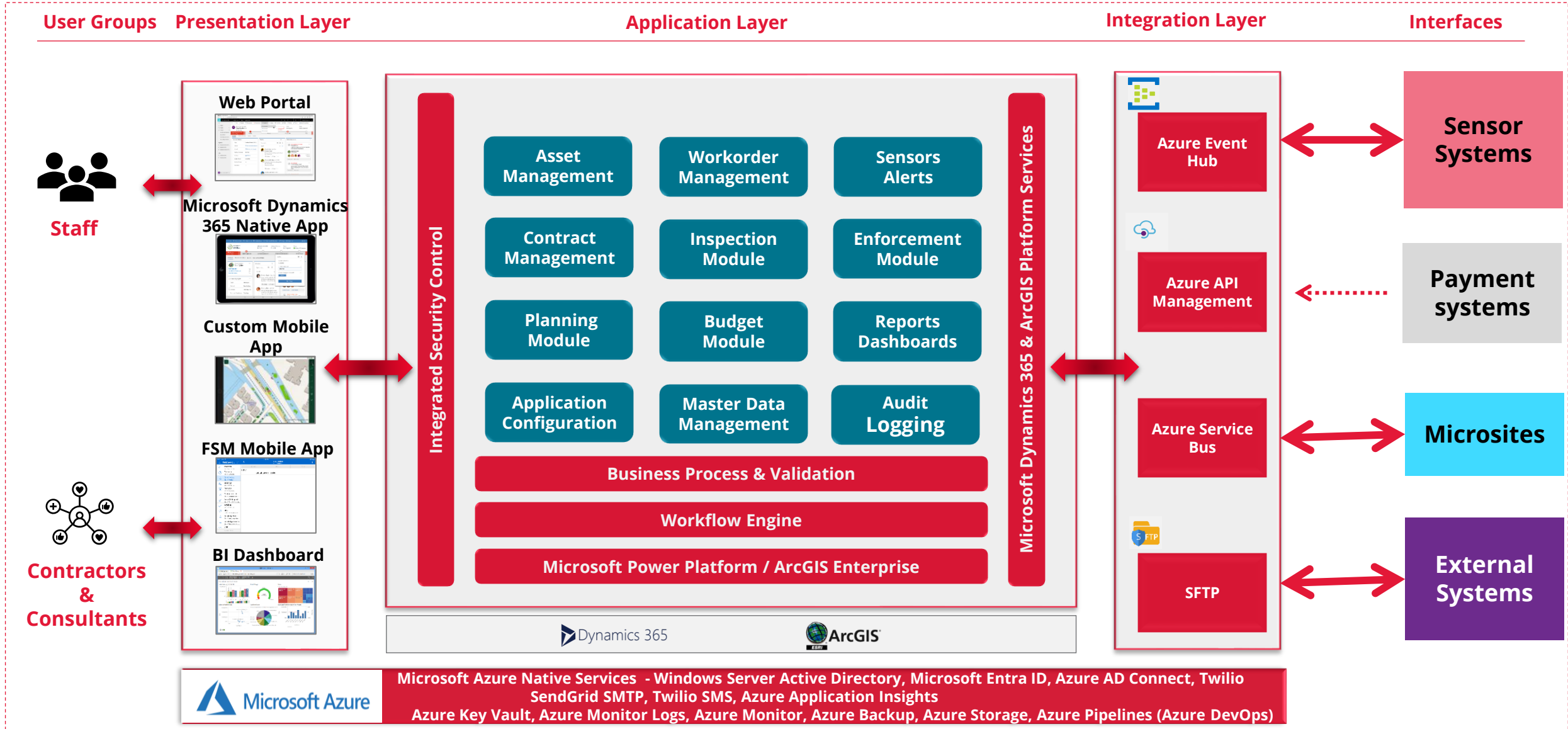
## Offering

- **Inspection Management** – Automates inspection scheduling, location management, and teams/users' allocations.
- **Tenders & Contracts** – Simplifies tender creation, approval, contract management, and penalties setup, while automating performance-based payments and insurance management.
- **ESRI Integration with Microsoft Dynamics 365 Field Service** – Combines GIS mapping with Microsoft Dynamics 365, enabling real-time work orders, schedule generation, and deep linking for improved field service operations.
- **Budget Management** – Manages fund centers, cost allocations, approval workflows, and integrates with external financial systems for fund requests.
- **Contractor Management** – Full lifecycle management of work orders, contractor assignments, execution tracking, penalties, payments, and approvals.
- **IoT Integration with Microsoft Dynamics 365 Field Service & GIS** – Leverages real-time IoT data, providing situational awareness, alerting, and evidence storage, integrated with Azure Blob Storage.

## Outcomes

- Streamlined processes across multiple modules (Inspection, Tenders, Budget, Contractor Management, IoT & GIS) with automated workflows, leading to faster execution and reduced administrative overhead.
- Enhanced operational efficiency with real-time data synchronization between Microsoft Dynamics 365 Field Service, ESRI GIS, and IoT systems, enabling proactive task management and location-based decision-making.
- Improved compliance and accuracy in inspections, contracts, and work orders through automated rules, approval matrices, and integration of performance tracking mechanisms.
- Centralized management of contracts, inspections, budgets, and contractor data, providing a unified view of project and financial statuses.
- Real-time situational awareness and evidence integration, allowing for immediate response to operational issues and better-informed decision-making.
- Increased scalability and flexibility in managing complex workflows, including fund allocation, contractor assignments, inspections, and IoT-driven alerts.

# Key Functions & Framework



# Overview of Core Components

## Inspection module

- Setting up of Inspection Groups, Schedules, Inspections
- Include and Exclude rules for Locations / Assets while generating inspections
- Including teams/ users to Inspection Schedules
- Define rules on % usage of Officers from each department
- Allocation of inspections based on the closed location proximity
- Adding / Removal of locations to the existing schedules

## Contractor Management : Full lifecycle Work Orders

- Creation of Work Order from multiple sources
  - Case ( OOTB)
  - Work Schedule (OOTB)
  - Add On – Custom controls for flexible Work Schedules
  - Setup to include / exclude contracts while Schedule creation
  - Static and Dynamic Schedule creation
- E2E process from WO, Assignment, Execution (Per Qty / Monthly Performance), Evidences, Payments, Penalties, Extension of Time, Credit Notes for Contractors
- Check In and Check Out (Manual, Auto – GHS, CFMS)
- Fund Checking, Contract status and amount check
- Trigger Approval based on Configurable Approval Matrix

## ESRI integration with Microsoft Dynamics 365 Field Service

- Seamless integration between applications
- Representation of Map in Dynamics Field Service textual view
- Deep linking between Map App & Microsoft Dynamics 365 App
- Real time integration framework while generating WO, Schedules, Requests from ESRI Map and Microsoft Dynamics 365 CRM
- Shopping Cart

## Budget Management

- Creation of Fund Centers
- Setting multiple Fund Types
- Mapping Cost centers and profit centers to Fund Centers
- Wallet Management under each Fund Center
- Approval Matrix
- Transfer History
- Request external system for more fund (Integration with Financial System if needed)

## Tenders & Contracts

- Creation of Tenders
- Approval process
- Auto creation of Contracts
  - Mapping Active Rates
  - Mapping Pricing based items
  - Mapping Lump sum-based items
  - Setup for Penalties ( Liquidated Damages & Infringements)
  - Setup of EOT Requests ( Extension of Time by vendors)
  - Setup up for performance-based payments
  - Security Deposits
  - Insurance

## IOT to Microsoft Dynamics 365 Field Service & GIS

- API's to leveraged for connecting to Vendor systems
- Situation Awareness to GIS
- Configurable Alert generation Threshold Setup
- Alert mechanism to CRM
- Store evidences (Video Streaming and Photos) in Azure Blob or SharePoint
- Integrate the live video streaming in GIS on Asset Layers

# Benefits of Solution

- 80% time and 45% cost savings by automating key processes like inspections, contract creation, fund management, and work order approvals, improving overall workflow efficiency.
- Greater operational agility and visibility through seamless integration of mapping, IoT, and financial systems, enabling faster responses to changes and challenges.
- Reduced risk of errors and delays with enhanced accuracy in scheduling, contract management, and resource allocation across different operational domains.
- Improved collaboration and resource utilization by linking with various Microsoft 365 native systems like Microsoft Teams, Microsoft To Do, Microsoft Planner, Microsoft Outlook more effectively, ensuring the right people and tools are deployed at the right time.
- 100% financial control and transparency, with integrated budgeting, fund tracking, and payment management systems that ensure compliance and optimize resource allocation.
- Enhanced service delivery and contractor satisfaction by up to 30% through clear performance metrics, automated penalty and payment handling, and real-time monitoring.





# Microsoft Value and Success with the Solution

Tech Mahindra's custom solution seamlessly integrates Microsoft Dynamics 365 Field Service, addressing the pain point of fragmented systems. This collaboration enhances end to end visibility and decision-making capabilities, which have been proven to increase adaptability in field service management strategies.

- **Integrated Ecosystem:** Microsoft Dynamics 365 Field Service, ESRI GIS, and IoT create a connected platform that integrates operations, asset management, and field service, offering a unified view of the service lifecycle for improved collaboration and efficiency.
- **Operational Efficiency:** Microsoft's automation streamlines processes like tenders, contracts, work orders, and budgeting, reducing manual effort, speeding up decision-making, and enhancing scheduling and monitoring.
- **Real-Time Insights:** Seamless data integration from multiple sources provides real-time insights into asset status, contractor performance, and budgets, while Azure AI enable predictive maintenance and resource optimization.
- **Collaboration:** Microsoft's native tools like Microsoft Teams, Microsoft Power Platform, Microsoft 365 integrate with Microsoft Dynamics 365 Field Service to improve communication across users & groups, ensuring all stakeholders are aligned and workflows are streamlined.
- **Scalability & Flexibility:** With Microsoft Azure and Microsoft Dynamics 365, businesses can easily scale operations, expand geographically, and integrate new functionalities without major infrastructure changes, adapting to evolving needs.
- **Security & Compliance:** Microsoft's robust security (encryption, identity management) and compliance with global standards (GDPR) ensure data protection and regulatory adherence.
- **Enhanced Service Experience:** Real-time updates, proactive maintenance, and quick responses improve satisfaction, enabling businesses to offer better service delivery and personalized experiences.





## The Client

One of the government agency of Southeast Asia responsible for managing the nation's parks, nature reserves, and green spaces. It focuses on conservation, urban greening, biodiversity protection, and providing recreational areas for public enjoyment and education.



## The Challenge

Customer faced the need to replace its legacy systems to improve management of greenery and non-greenery assets, partner management, work order lifecycle, and budget processing. The existing system was inefficient, error-prone, and lacked scalability, requiring a comprehensive transformation for better operational performance and cost control.



## The Solution

Tech Mahindra implemented Microsoft Dynamics 365 Field Service, integrated with IoT, mobility, and GIS, to optimize asset management, maintenance, and partner operations. A custom mobile app provided offline access for managers, while real-time data and intuitive GIS navigation improved efficiency. The solution supported 1,500+ users and was scalable across sectors.



## The Impact

The solution streamlined operations, reducing errors and manual effort. Real-time updates, offline capabilities, and enhanced asset tracking increased efficiency. Improved cost control through better partner and budget management led to informed decision-making, while the scalable system supported future growth and could be replicated across other verticals.



## Why Tech Mahindra

Customer selected us due to its proven track record, extensive expertise in the multiple sector, and proficiency in implementing Microsoft Dynamics 365. Our alignment with customer's organizational culture and its ability to deliver customized technological solutions focused on achieving strategic objectives were key factors in the decision. Additionally, our skilled team and successful implementation of Microsoft Dynamics 365 in Asia region, demonstrated their capability to address challenges and facilitate a successful digital transformation.

# Contact Us

For more information, contact the Microsoft Apps, Digital Enterprise Applications



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