

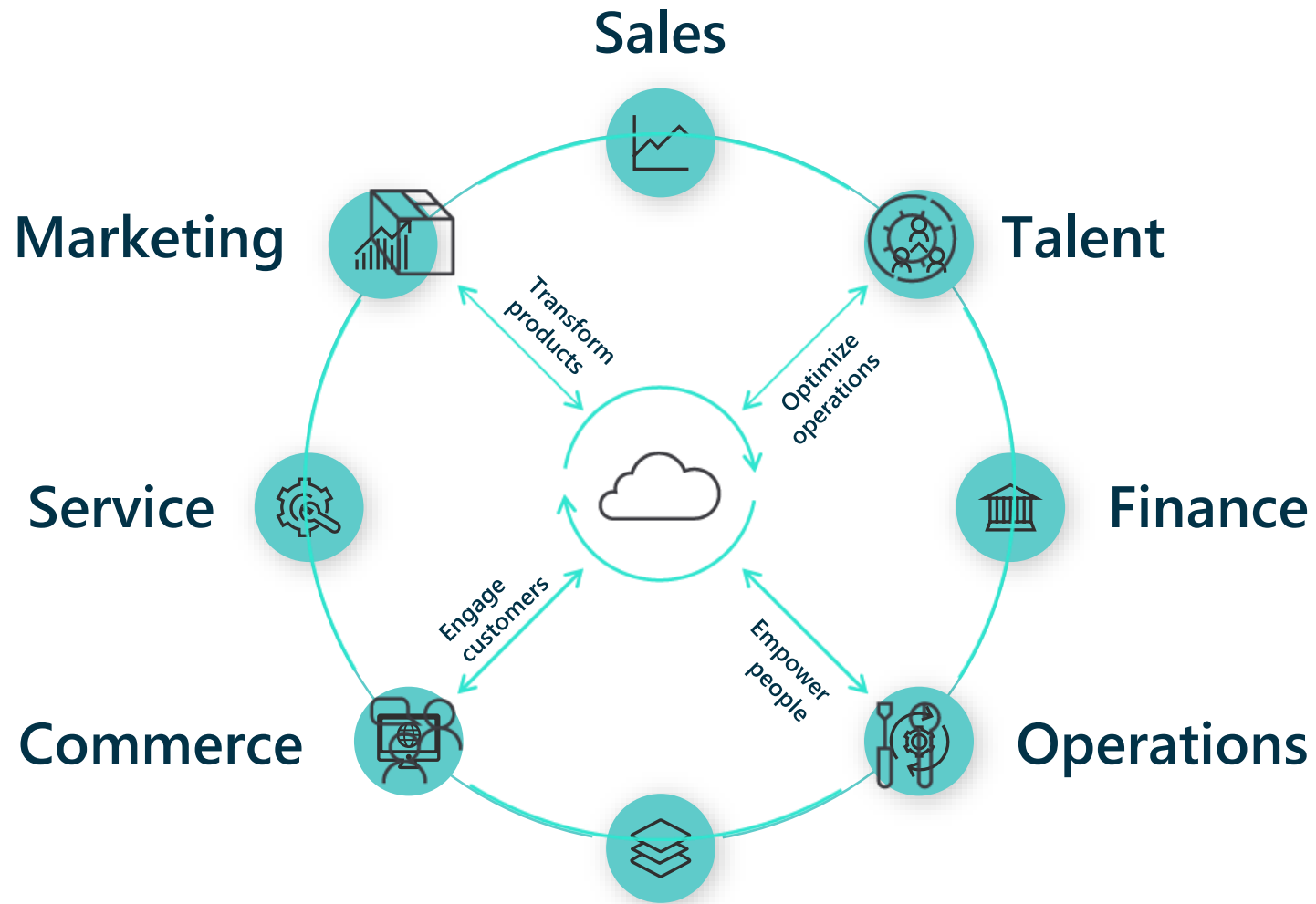
Connected field service



How do you want to
transform your
business with
Dynamics 365
Field Service?

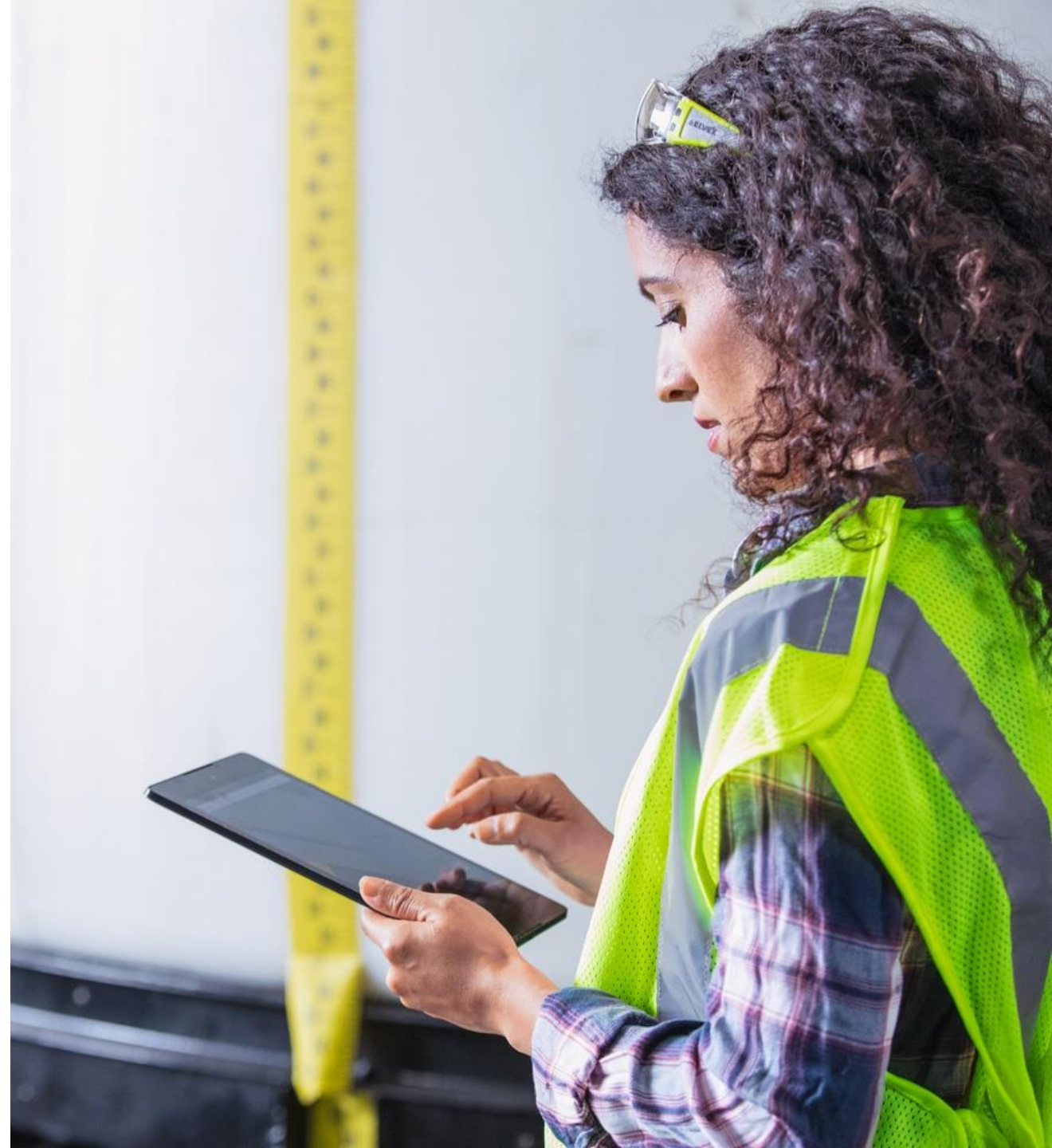


The world's connected AI business cloud



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?



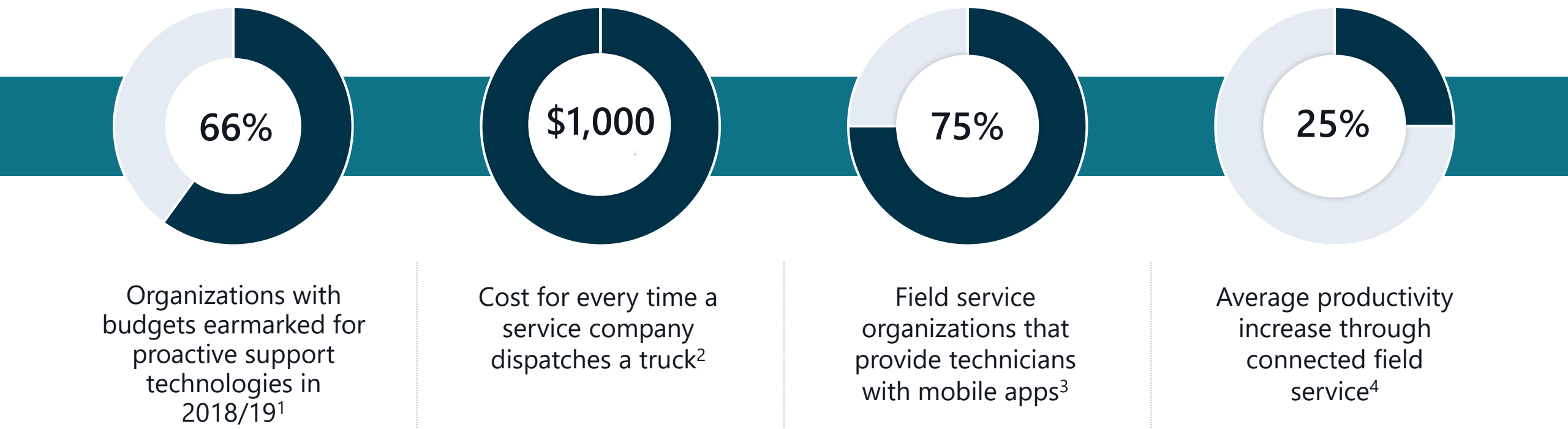
Are the technologies you're using today supporting your business needs?



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



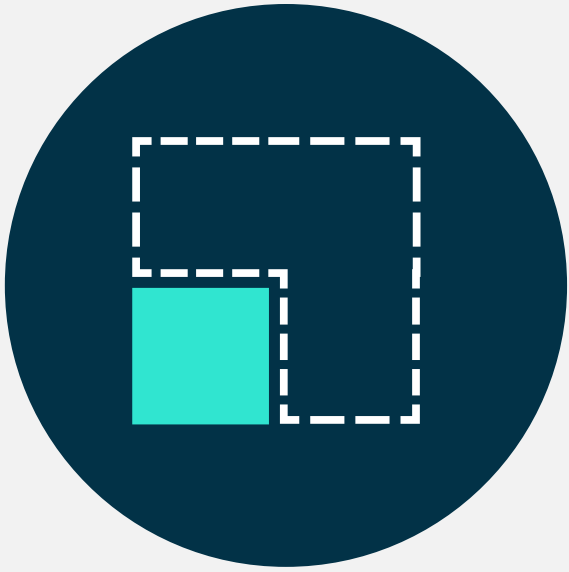
Business concerns



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

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

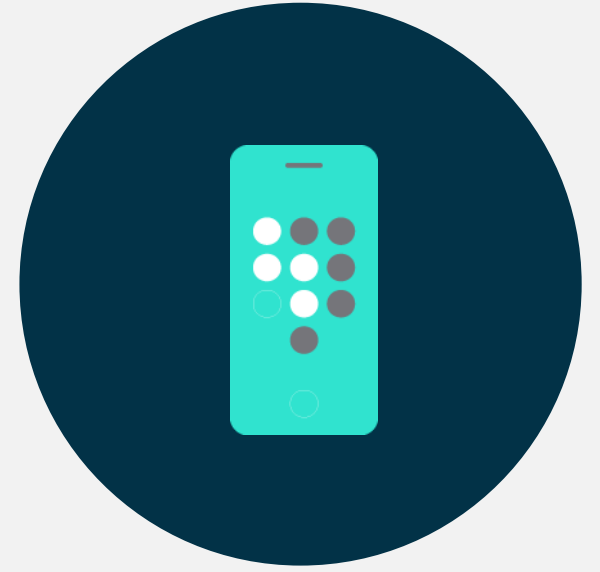
Typical functional concerns



Reactive, break-fix
business models and
inability to scale



Outdated/siloed systems
causing inefficiencies

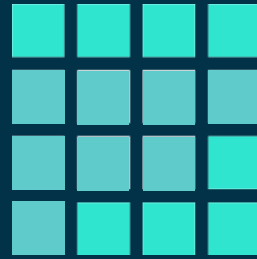


Poor technician
enablement due to lack of
mobile capabilities

The changing landscape



Increased use of
proactive support
models



Real-time insights and
troubleshooting through
augmented reality
capabilities

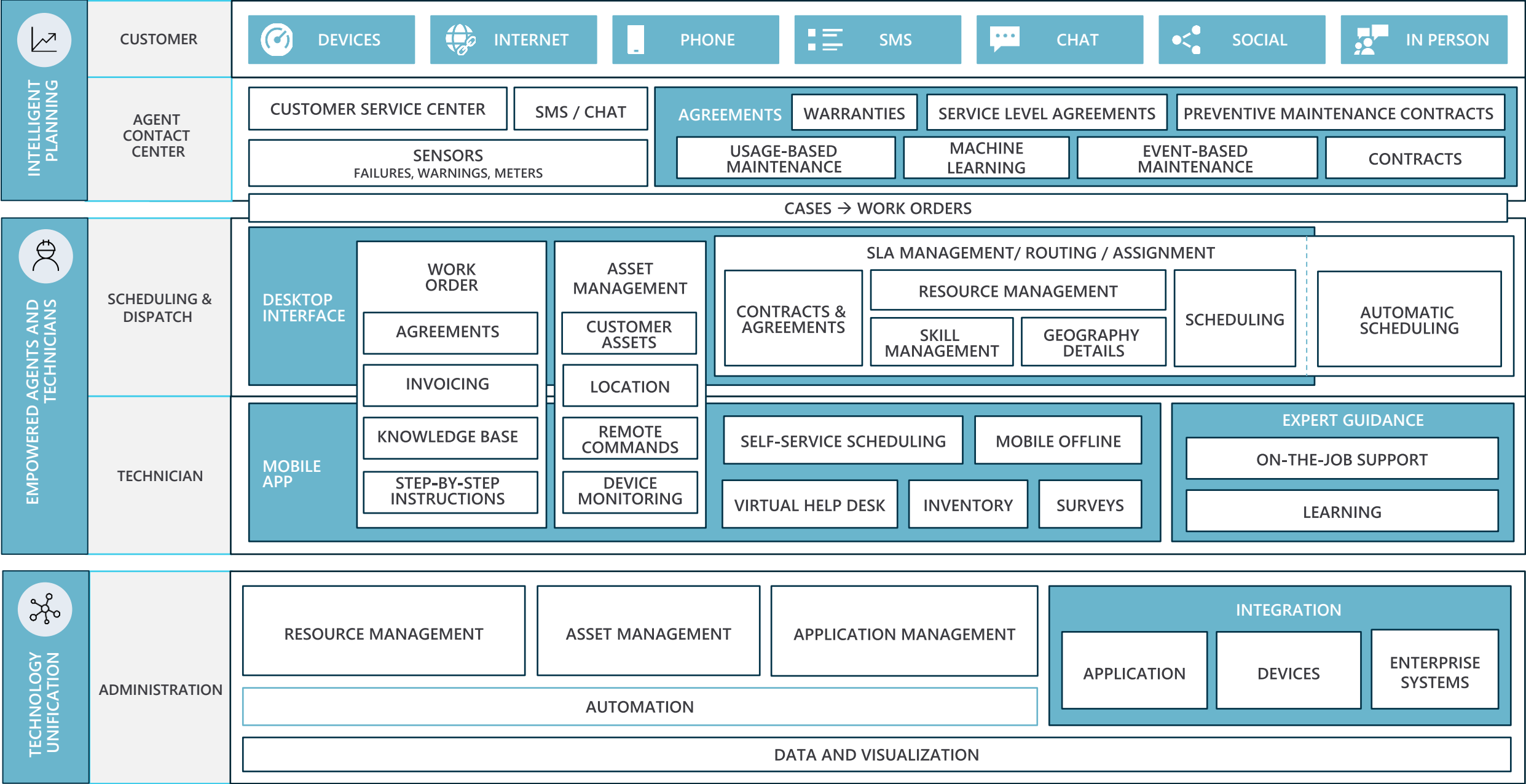


Predictive maintenance
driven by data analytics,
ensuring proactive
customer engagement

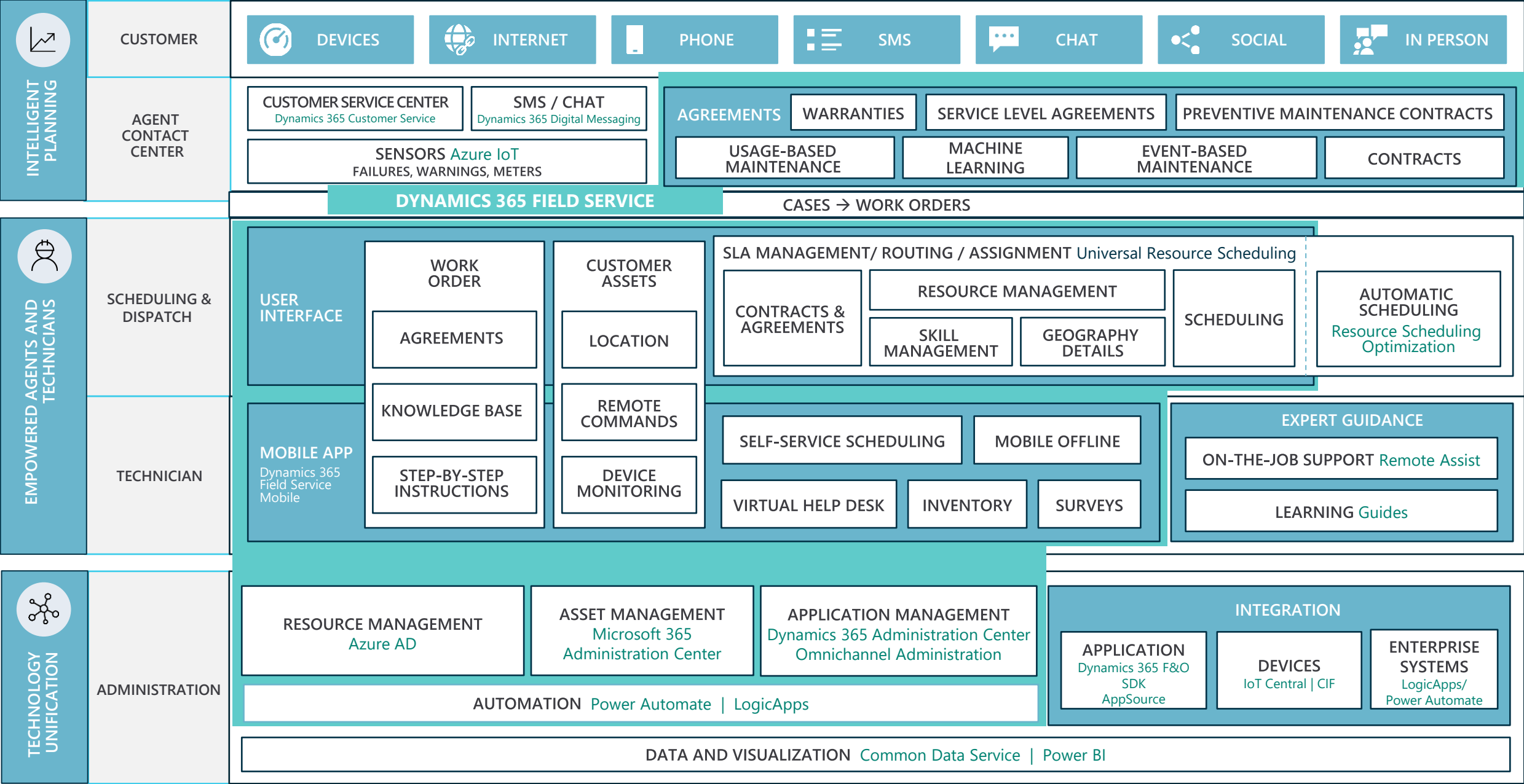
Product complexity and increasing customer demands have surpassed
existing technology stack abilities to support operations¹

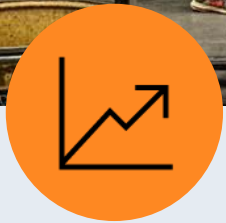
¹ [TSIA 2019](#)

Functions enabling connected field service



Microsoft ecosystem supporting connected field service





Intelligent planning

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

Multichannel customer engagement



Connect with your
customers



Effectively create work
orders



Engage with your
customers



Keep track of all service
interactions



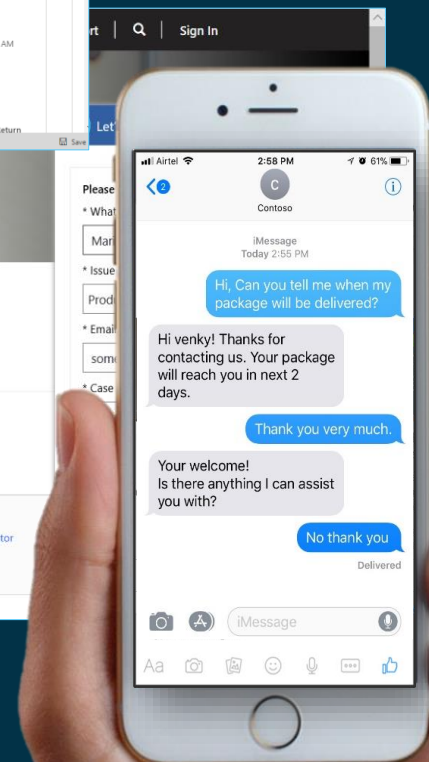
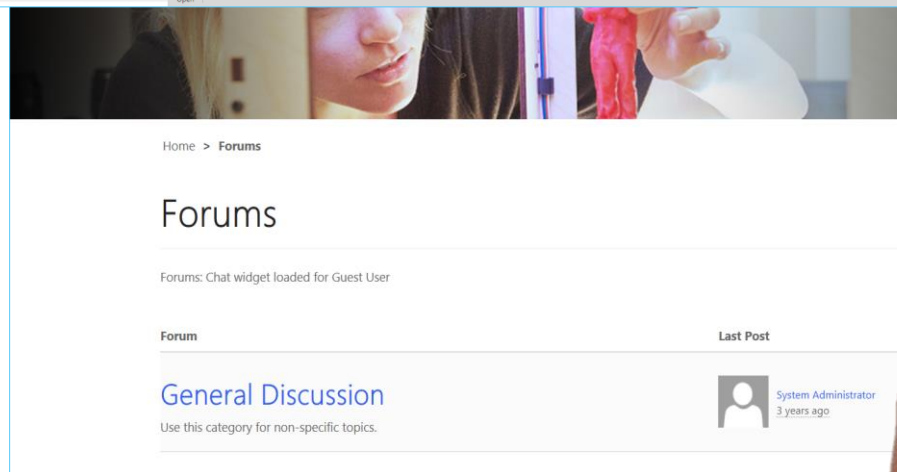
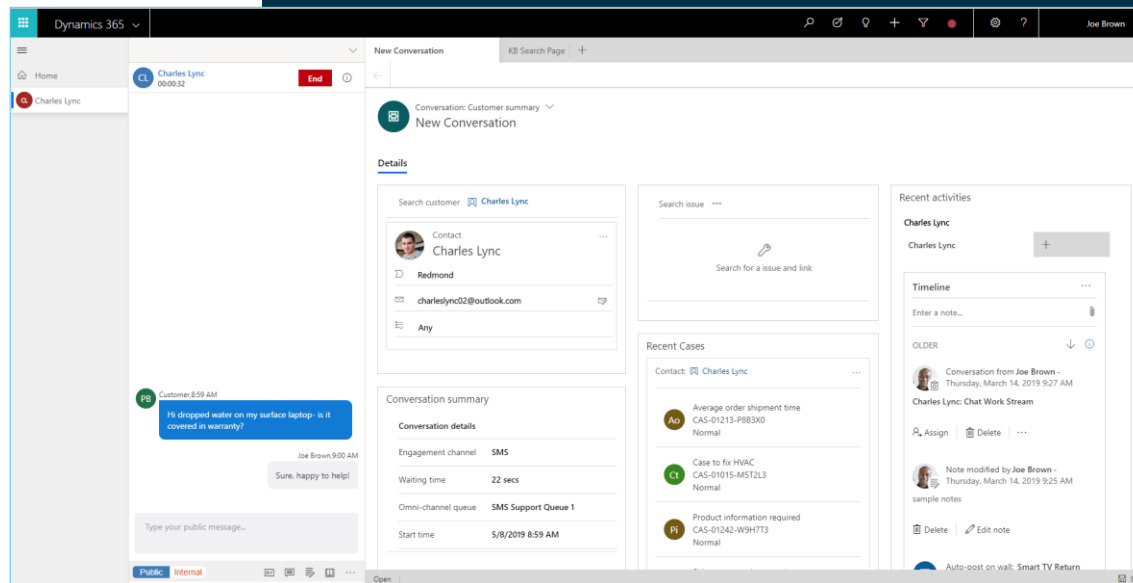
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PLANNING

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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PLANNING

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

Work Order: Work Order 00172

Work Order Business Pro... Active for less than one mi... Work Order (< 1 Min) Schedule Work Order

Summary Settings Products Services Service Tasks Address Location Record Log Related

GENERAL

Work Order Number * 00172

Service Account * Contoso Pharma Integration

Billing Account Contoso Pharma Integration

System Status * **Open - Unscheduled**

Substatus * ---

Work Order Type * Install or replace

Price List * Products and Packaged Ser...

Work Order Summary ---

SLA ---

Timeline

Enter a note...

No records to show.

PRIMARY INCIDENT

Primary Incident Type * Install IoT

Primary Incident Description ---

Primary Incident Estimated Duration 1 hour

Primary Incident Customer Asset ---

IoT Alert ---



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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

Contoso, Ltd. | Opportunities | Support | Field Service | Project Service Automation | Search

Home > Field Service

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 122x0
BY Fire Alarm 2d	Blue Yonder Airlines	BY Fire Alarm System 322e
BY Fire Alarm System 122x0	Blue Yonder Airlines	
BY Fire Alarm System 322e	Blue Yonder Airlines	

Active Invoices

Invoice ID	Name	Status	Status Reason	Amount Due	Total Amount	Due Date	Created On
INV-01000-GTQ914	WO 1	Active	New	\$2,139.83	\$2,139.83	9/7/2018	8/28/2018 1:04 PM

Active Work Orders

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

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



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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

Contoso, Ltd.

Home > Field Service > Invoices

Invoices

Active Invoices

Invoice ID ↑	Name ↑	Status	Status Reason	Amount Due	Total Amount	Due Date	Created On
INV-01002-KSY0Q5	Building Invoice	Active	New	\$0.00	\$0.00		3/6/2017 2:32 PM
INV-01003-W4X9700	INV #13017	Active	New	\$1,350.00	\$0.00		3/6/2017 3:39 PM

Hi Admin User

Welcome to your personalized service portal

Case by Status (All)

In Progress

My Open Cases

Case Number	Case Title	Case Type
CAS-10441-B5X9Y3	Thermostat Malfunction	Problem

Contoso, Ltd.

Home > Field Service > Work Orders

Work Orders

Active Work Orders

Request Work Order

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

Dynamics 365 Field Service Agreements > New Agreement

SAVE SAVE & CLOSE NEW FLOW FORM EDITOR

AGREEMENT New Agreement

Agreement Number* 00005 Service Account* Coho Winery (sample) Owner* Admin #

Agreement (Active) Agreement Booking Setup Agreement Status Agreement Invoice Setup Activate Agreement

Dynamics 365 Field Service Agreements > 00005

+ NEW DEACTIVATE DELETE COPY AGREEMENT PROCESS ASSIGN SHARE SHARE SECURED FIELDS EMAIL A LINK

AGREEMENT 00005

Agreement Number* 00005 Service Account* Coho Winery (sample) Owner* Admin #

General

SUMMARY

Agreement Number Agreement Number

Service Account Coho Winery (sample)

Billing Account Coho Winery (sample)

System Status Estimate

Sub-Status

Description

ACTIVITIES

Notes

BOOKING SETUP

INVOICE SETUP



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Predictive maintenance enabled by IoT



Gain insights to
react quickly



Monitor devices
remotely



Automate
maintenance



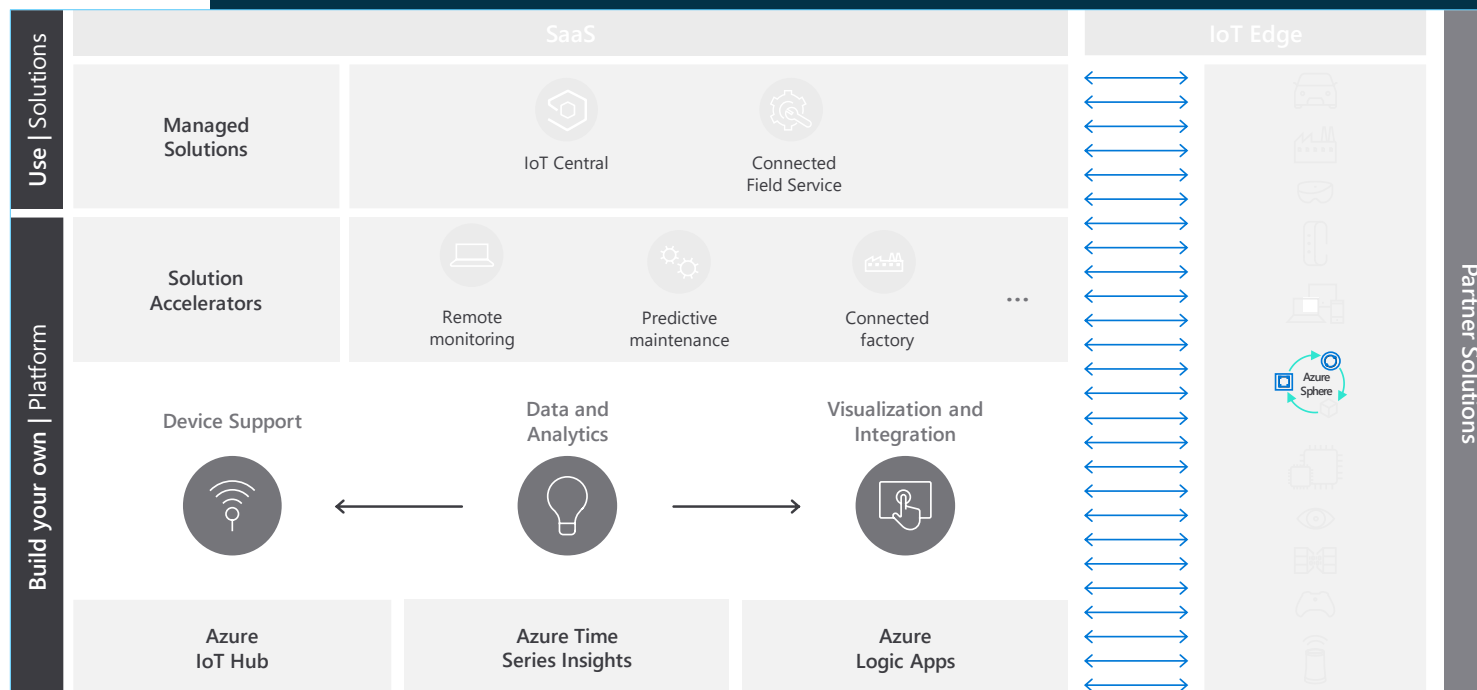
INTELLIGENT
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Predictive maintenance enabled by IoT



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





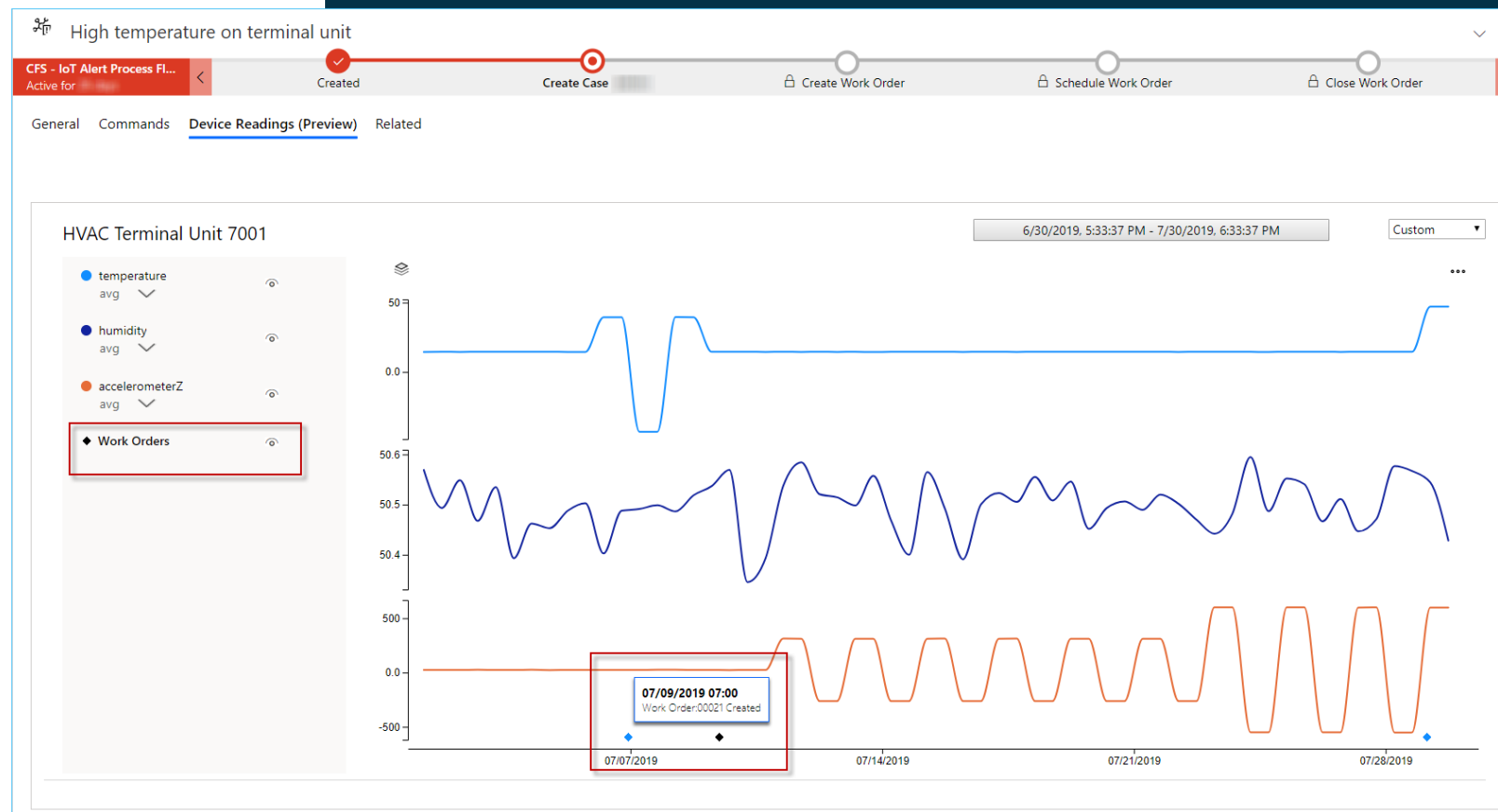
INTELLIGENT
PLANNING

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 Power Automate to integrate IoT-connected devices with an active alert system to receive updates on specific device activity





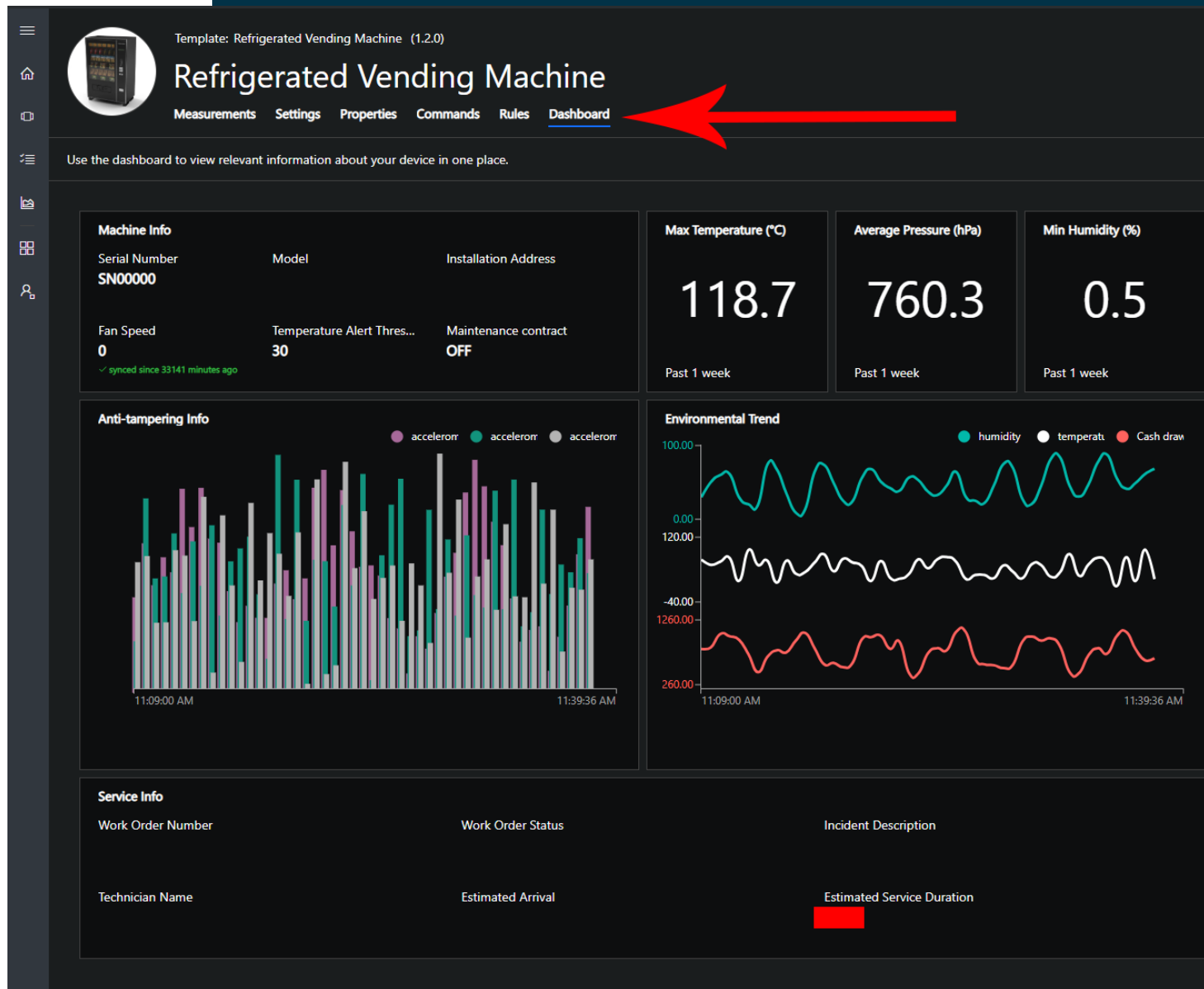
INTELLIGENT PLANNING

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





INTELLIGENT
PLANNING

Proactive field service driven by machine learning



Optimize resource
management



Improve customer service
delivery capabilities



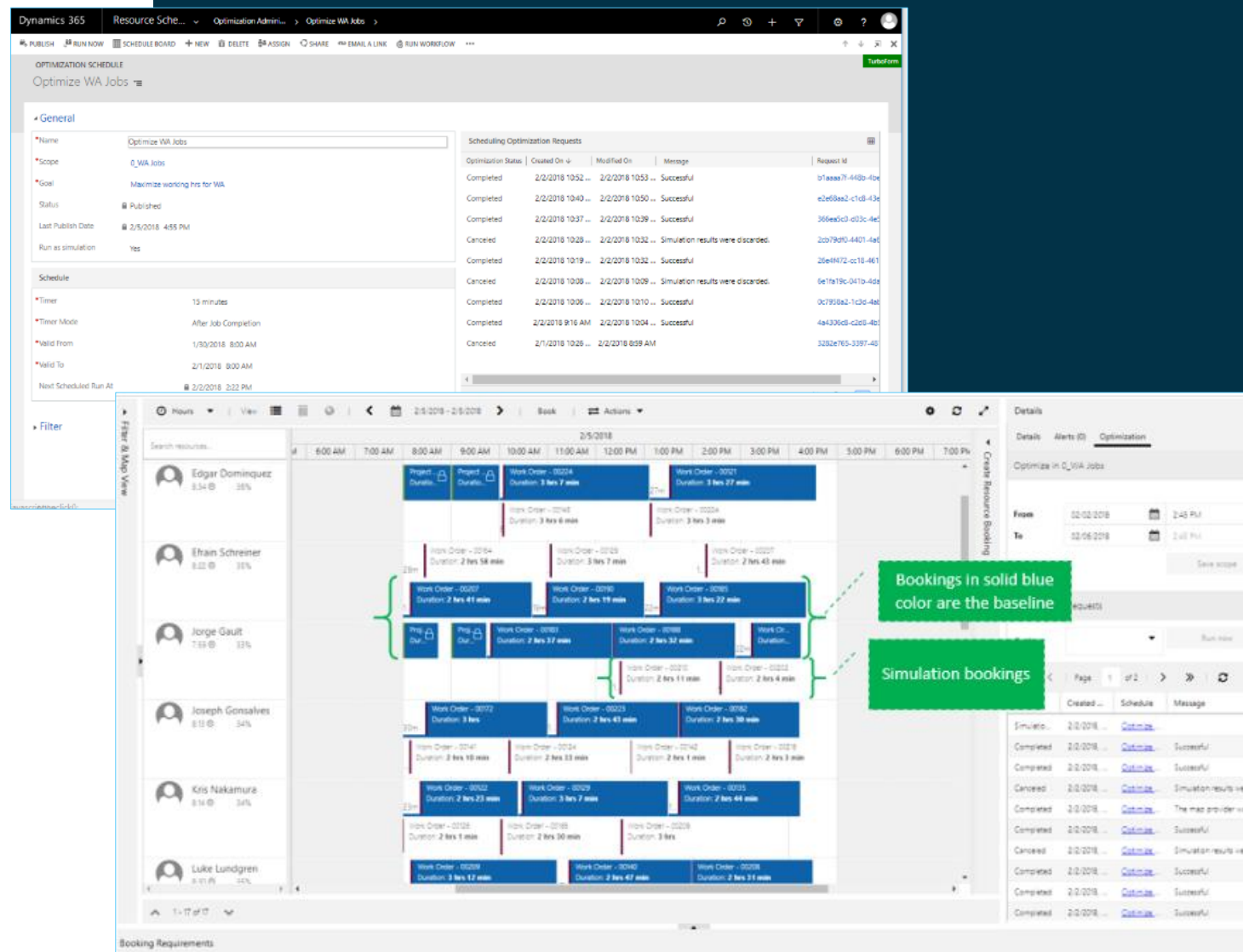
INTELLIGENT
PLANNING

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





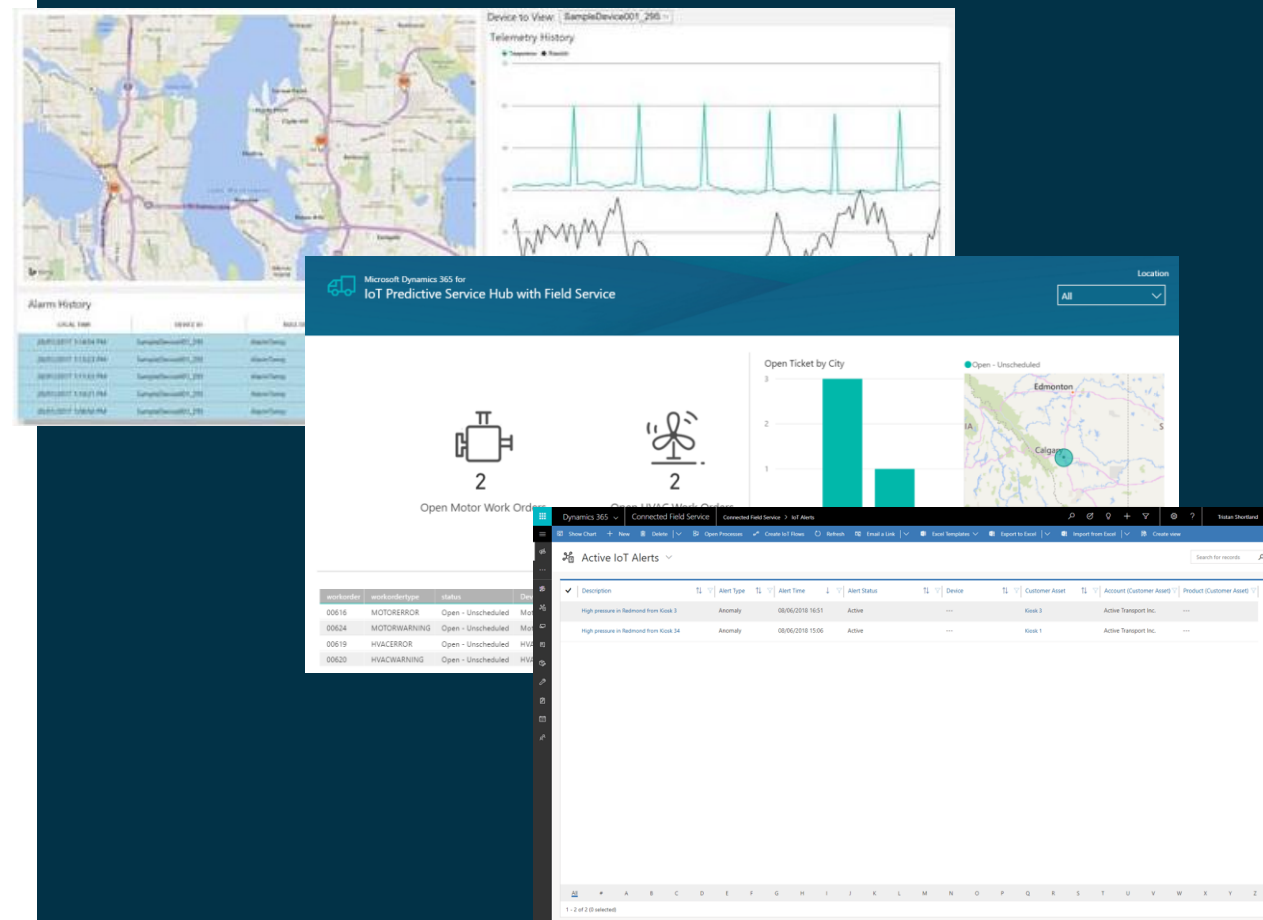
INTELLIGENT PLANNING

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





Empowered agents and technicians



Right people at the right time

Effective asset and inventory
management



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

The screenshot displays a software interface for resource management and scheduling. On the left, a map shows a geographical area with various locations marked. In the center, a list of resources is shown, including Brady Hanson, Jeff Maralis, Jorge Gault, Ricardo Seely, Simon Riley, Van Amundson, and Victor Timm. On the right, a scheduling grid shows work orders assigned to these resources over time. Below the map, a 'BOOKABLE RESOURCE' form is visible, showing details for a 'New Bookable Resource' and a 'Field Technician'. The form includes fields for Resource Type, User, Name, Time Zone, Hourly Rate, Warehouse, and Scheduling options.

BOOKABLE RESOURCE
New Bookable Resource

BOOKABLE RESOURCE
Field Technician

BOOKABLE RESOURCE
Field Technician

Name	From Date	To Date	Duration	Priority	Territory	Time From Promise	Time To Promise	Status	Created On
Brady Hanson	08/01/2016 9:00 PM	01/01/2017 9:59 PM	0 hr					Active	11/27/2016 6:40 PM
Jeff Maralis	08/05/2016 9:00 PM	08/26/2016 4:59 PM	0 hr					Active	11/27/2016 6:40 PM
Jorge Gault	16/01/2016 6:00 PM	16/12/2016 4:59 PM	0 hr					Active	11/27/2016 6:40 PM

BOOKABLE RESOURCE
Field Technician

BOOKABLE RESOURCE
Field Technician

Start Location	Resource Address	Organizational Unit
End Location	Resource Address	Longitude
Latitude		

Scheduling

Display On Schedule Board	Yes	Enable for Availability Search	Yes
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EMPOWERED AGENTS AND TECHNICIANS

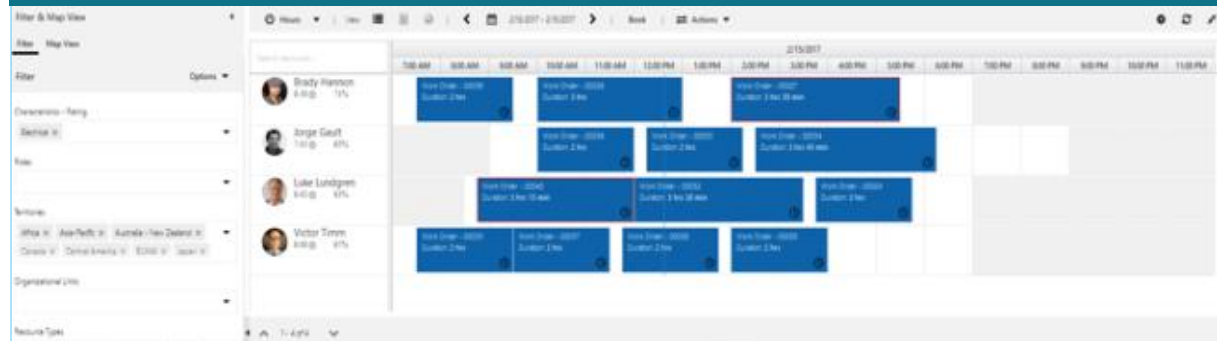
Right people at the right time



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”

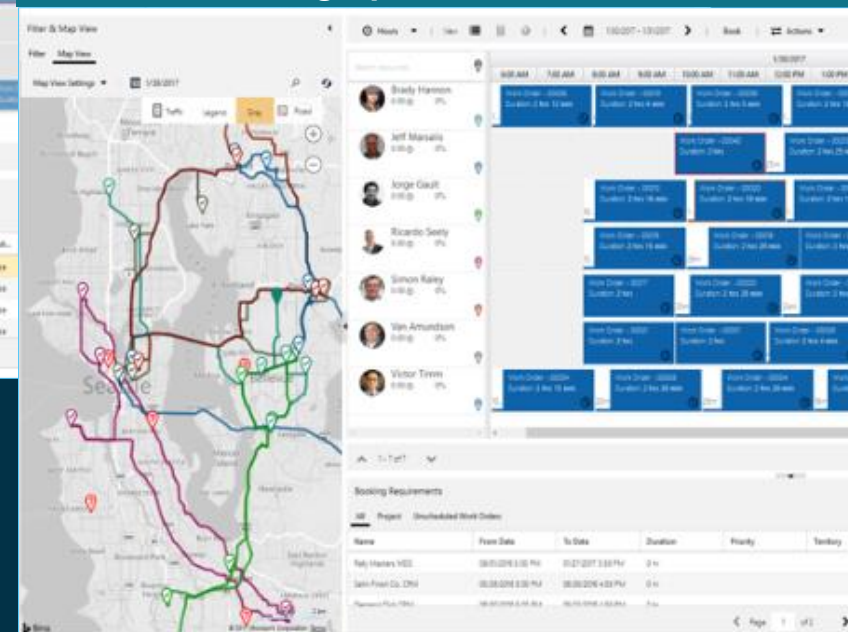
Manual scheduling



Scheduling Assistant



Resource Scheduling Optimization (RSO)





EMPOWERED AGENTS
AND TECHNICIANS

Effective asset and inventory management



Asset and inventory
management



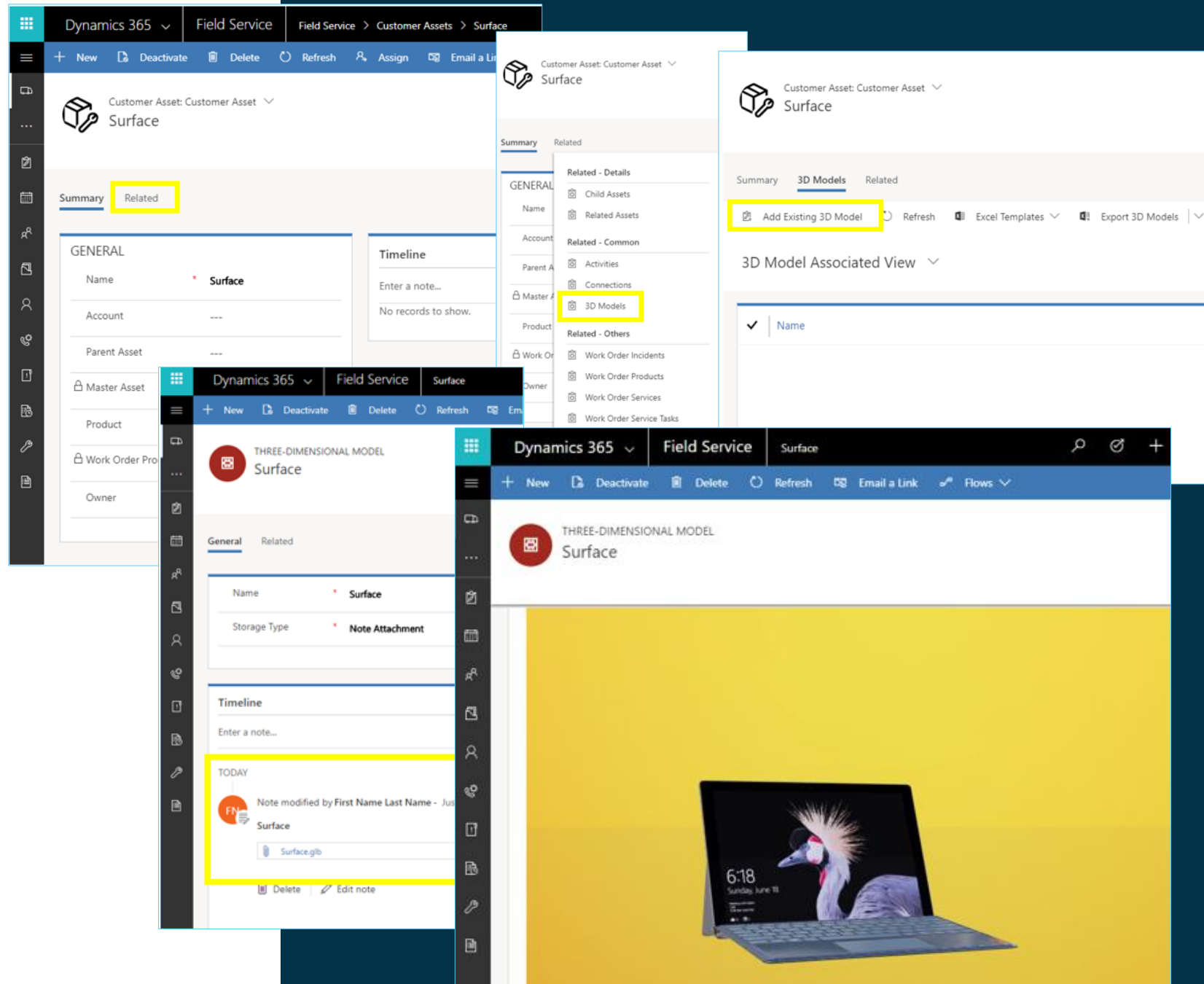
EMPOWERED AGENTS AND TECHNICIANS

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





EMPOWERED AGENTS AND TECHNICIANS

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 TL	Quantity On Hand TL	Quantity On Order TL	Quantity Allocated TL	Reorder Point TL
	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	---

Next steps



Take the next step

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

[Contact us](#)



Microsoft Dynamics 365