



## What's Possible With Microsoft Dynamics 365 Field Service

April 10, 2025

Microsoft  
Partner

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**mazars**

# U.S. Presence

## Top 10

U.S. Public  
Accounting Firm\*

## \$2.2bn

Revenue  
(FY2024)

## 75

Markets

## 29

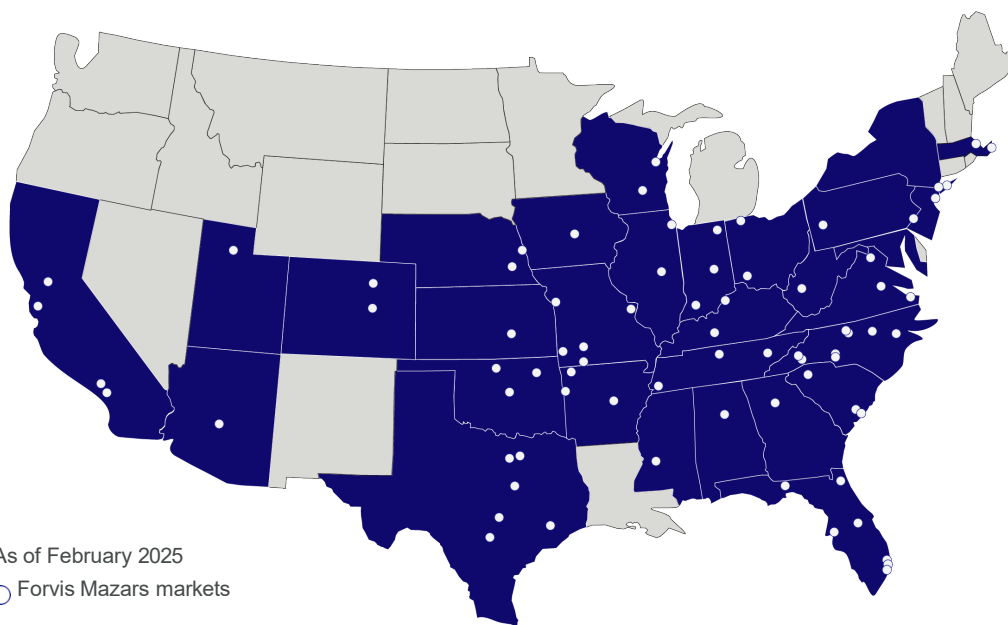
States

## 600+

Partners &  
Principals

## 7,000+

Employees



**Alabama**  
Birmingham

**Arizona**  
Phoenix

**Arkansas**  
Fort Smith  
Little Rock  
Rogers

**California**  
Irvine  
Los Angeles  
Sacramento  
San Jose

**Colorado**  
Colorado Springs  
Denver

**Florida**  
Boca Raton  
Fort Lauderdale  
Jacksonville  
Miami  
Orlando  
Tallahassee  
Tampa Bay

**Georgia**  
Atlanta

**Illinois**  
Chicago  
Decatur

**Indiana**  
Evansville  
Fort Wayne  
Indianapolis

**Iowa**  
Des Moines

**Kansas**  
Wichita

**Kentucky**  
Bowling Green  
Louisville

**Massachusetts**  
Boston Brewster  
Boston-Chestnut Hill

**Mississippi**  
Jackson

**Missouri**  
Branson  
Joplin  
Kansas City  
Springfield  
St. Louis

**Nebraska**  
Lincoln  
Omaha

**New Jersey**  
Iselin

**New York**  
Long Island  
New York City

**North Carolina**  
Asheville  
Charlotte SouthPark  
Charlotte Uptown  
Greensboro  
Greenville  
Hendersonville  
Raleigh  
Winston-Salem

**Ohio**  
Cincinnati  
Toledo

**Oklahoma**  
Enid  
Oklahoma City  
Tulsa

**Pennsylvania**  
Fort Washington  
Pittsburgh

**South Carolina**  
Charleston  
Greenville  
Summerville

**Tennessee**  
Knoxville  
Memphis  
Nashville

**Texas**  
Austin  
Dallas  
Fort Worth  
Houston  
San Antonio  
Waco

**Utah**  
Salt Lake City

**Virginia**  
Norfolk  
Richmond  
Tysons

**West Virginia**  
Charleston

**Wisconsin**  
Appleton  
Madison

\* Source: Inside Public Accounting, based on most recent rankings

FY2024 combined revenues: FORVIS & Mazars USA

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# Business Technology Services


Forvis Mazars provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations
- Designing & implementing modern operational systems
- Reviewing new business-facing technologies
- Leveraging existing investments in legacy technologies
- Integrating data solutions



# Business Technology Services

 **ERP**


Microsoft Dynamics 365

Finance	Supply Chain
Commerce	Project Operations
Business Central	Dynamics GP

NetSuite

Sage & Sage Intacct

Trimble Construction One


 **CRM**

Microsoft Dynamics 365

Sales	Customer Service
Customer Insights	Field Service

Salesforce

Marketing Automation

 **Advanced Technology**

Insights

Microsoft Power BI

Solver Planning & Analysis

Automation

Microsoft Power Platform

Robotic Process Automation (RPA)

App Development

 **Managed Services** for business applications, IT, & cybersecurity support.

Microsoft Partner

ORACLE  
**NetSuite**  
Solution Provider Partner

**Sage** Partner

salesforce **PARTNER**

  
**solver**

**Trimble**  
Construction One™

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# Today's Presenter



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## What's Possible With Microsoft Dynamics 365 Field Service

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# Objectives

1. Describe the core features & benefits of Microsoft Dynamics 365 Field Service
2. Explain how to enhance scheduling, dispatching, & work order management to help improve field service efficiency
3. Discuss how to leverage mobile technology & real-time data to empower field technicians & improve customer experiences
4. Review recent Copilot features & updates deployed for Field Service users



# 01

## Dynamics 365 Field Service

Let's review the core capabilities of Microsoft's Dynamics 365 Field Service module





# Dynamics 365 Field Service

## Core Functionality

### Overview

#### Work Order Management

- Easily create & manage work orders for customers
- Templates available for expected work, cost, inventory, & tasks
- Define characteristics needed for performed work

#### Resource Management

- Set skills, rates, & characteristics
- Define work calendar & home location
- Track internal or external resources
- Includes crews, equipment, or resource pooling

#### Scheduling/Dispatching

- Interactive schedule board with drag & drop functionality
- Quick scheduling from within work orders
- Find the best & closest resource for the job
- Minimize travel time & maximize resource utilization

#### Mobile App for Technicians

- Daily listing of assigned bookings with all required details
- Capture photos, audio, or video & status changes
- Track service & inventory used for customer billing & cost

#### Inventory Management

- Create warehouses for technicians & track product inventory
- Transfer inventory between warehouses
- Alerts when inventory is low or more quantity is expected to be needed based on assigned work orders

#### Time & Cost Tracking

- Automatic status timestamps based on bookings
- Time Entry & product tracking using the CRM Product Catalog
- Line-item costs, amounts, discounts, minimums, etc.

# 02

## Scheduling & Work Order Management

Understand how Work Orders track critical information for your customer's service requests & how to find the right resource for the job.



# Dynamics 365 Field Service

## Work Order Management

### Field Service Enhancements on CRM System Views

- All standard CRM system view functionality is available in Field Service (define filters, columns, create personal views, & more)
- Rich controls added for System Status & Priority to quickly surface information for dispatchers & managers
- Side panel view allows a quick view into Work Order details without navigating away from the grid view

Work Orders

Work Order Number

Primary Incident Type

Service Account

System Status

Priority

B...

C. ↓

00022

Willow Lane Restaurant

Scheduled | Scheduled

High

HS

H

2/27/20

00021

Walnut Street Market

Scheduled | Scheduled

Emergency

DM

D

2/27/20

00020

The Maple Cafe

Scheduled | Scheduled

Normal

TG

Tr

2/27/20

00019

Spruce Tree Cafe

Scheduled | Scheduled

Normal

HS

H

2/27/20

00018

Spruce Avenue Salon

Unscheduled | New

Normal

2/27/20

00017

Poplar Street Library

Scheduled | Scheduled

High

HS

H

2/27/20

00016

Poplar Avenue Pet Store

Unscheduled | New

Normal

2/27/20

Created on

2/27/2025 3:39 PM

Service account

Oakwood Fitness

General

Booking

Details

Status

Scheduled | Scheduled

Priority

Normal

Service account

Oakwood Fitness




# Dynamics 365 Field Service

## Work Order Management

### Copilot Work Order Summaries

Summary pulls from scheduled bookings, products, services, & tasks for the Work Order. Custom fields can be added to the summary if desired with in-app configuration options.

 **Copilot** PREVIEW ?

You are scheduled for a service visit to inspect a furnace or AC unit in West Des Moines, IA, on April 10, 2025, at 8:00 AM. The primary task is to inspect the unit based on a reported issue, with no immediate repairs expected. You will need to check for dirty air filters that require replacement as part of regular maintenance to ensure proper airflow.



Your specific tasks include:

- Checking the motor for excessive wear and cleaning if necessary.
- Checking all filters and replacing them if needed.
- Identifying and confirming the make and model of the unit.

You will need two air filters for the inspection. The booking is assigned to Tom Gioielli, and the duration of the visit is scheduled for 2 hours.

**Regenerate**

AI generated content may be incorrect.  
[Learn more](#) [Terms](#)

# Dynamics 365 Field Service

## Work Order Management

### Work Order Task List

Tasks, a long-standing feature of Field Service, have a new grid control that makes updating a breeze for technicians. This reduces the effort & time needed to update the system after a job.

00013 - Saved

2/27/2025 3:39 PM  
Created on

Oakwood Fitness  
Service account

Work Order · Work Order

GeneralProducts and servicesTasksReferenceTimelineRelated

Task completion  
0/3 tasks

Total estimated duration  
25min

Total actual duration  
0min

☑ Mark all as complete

+ Add task

...

<input type="checkbox"/>	Name	Customer Asset	Estimated duration	Actual Duration	Progress	Inspection result
<input type="checkbox"/>	Identify Make/Model of Unit Identify and confirm the make and model of the unit		5min	0 minutes	<input type="radio"/> Incomplete	
<input type="checkbox"/>	Check and Clean Filters Check all filters and replace if needed		5min	0 minutes	<input type="radio"/> Incomplete	
<input type="checkbox"/>	Check motor wear Check the motor for excessive wear, clean if necessary		15min	0 minutes	<input type="radio"/> Incomplete	

# Dynamics 365 Field Service

## Work Order Management

### Work Order Products/Services

Additional fields to track estimated & actual prices & costs for service used during a Work Order. Easy entry & updates for a technician, with the full power of the CRM Product Catalog behind it.

Work Order · Work Order

Created on | Service account

General

Products and services

Tasks

Reference

Timeline

Related

Estimated total cost	\$24.00	Estimated subtotal price	\$24.00
Total cost	\$0.00	Subtotal price	\$0.00
		Estimated total price	\$24.00
		Total price	\$0.00

Products

Services

+ Add product

<input type="checkbox"/> Name	Type	Estimate Quantity	Quantity	Estimated total price	Total price	Status
<input type="checkbox"/> Air Filter	Inventory	2.00		\$24.00	\$0.00	Estimated

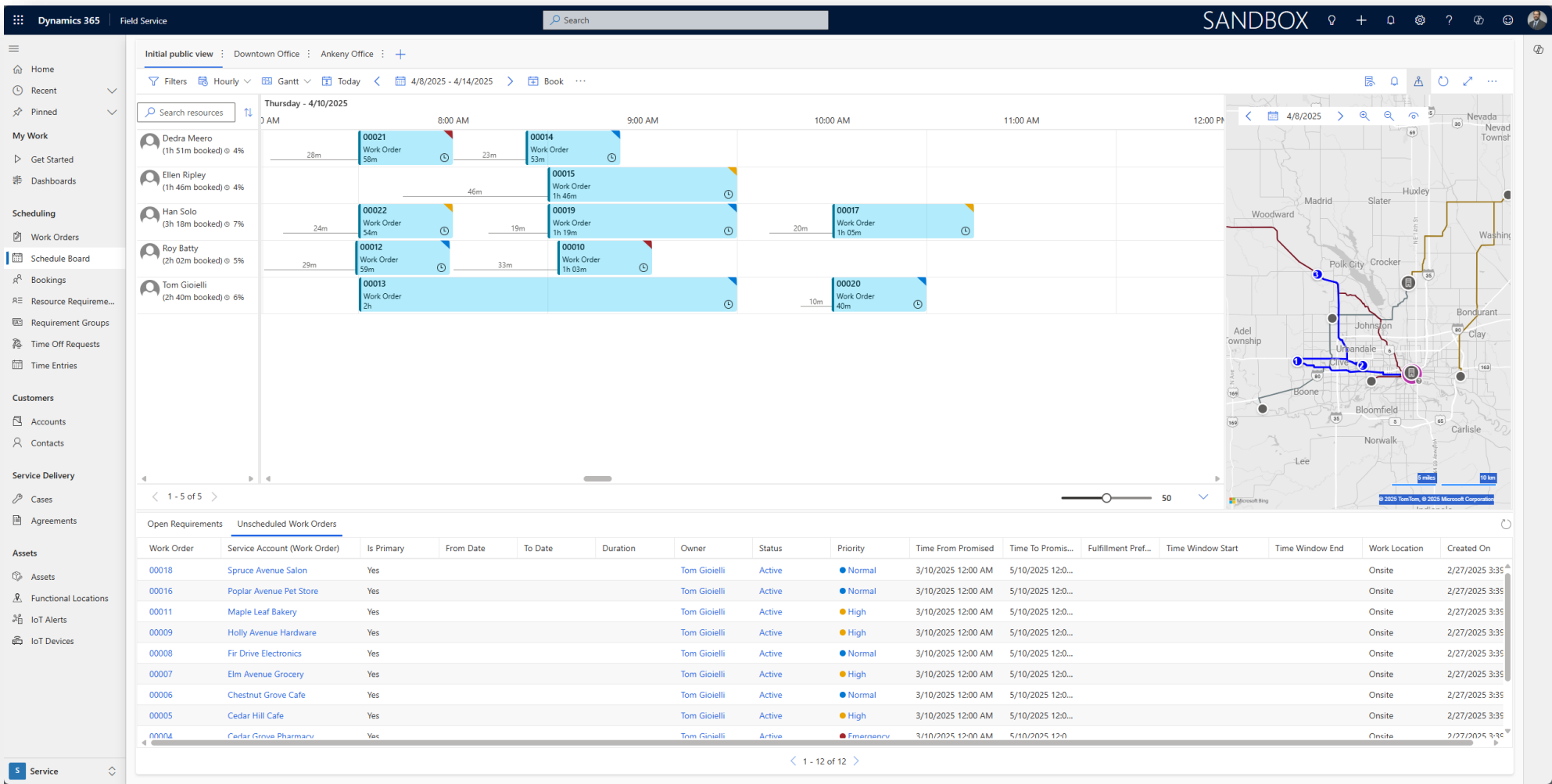
1 of 1 (0 selected)

Page 1



# Dynamics 365 Field Service Scheduling/Dispatching

## The Schedule Board



# Dynamics 365 Field Service

## Scheduling/Dispatching

The system can offer booking suggestions directly on the Work Order by searching for resources who meet the requirements & have the shortest travel time to the work location.

### Work Order Booking Suggestions

Booking suggestions

TG

Tom Gioielli

Tue, Mar 18, 2025

3:02 PM - 3:32 PM

18min travel time

Book

TG

Tom Gioielli

Wed, Mar 19, 2025

7:48 AM - 8:18 AM

18min travel time

Book

TG

Tom Gioielli

Thu, Mar 20, 2025

7:48 AM - 8:18 AM

18min travel time

Book

Requirements

30min duration

Find availability

### Quick Bookings

Book Resources

Filters:

All Resources

April 2025

Su

Mo

Tu

We

Th

Fr

Sa

30

31

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

1

2

3

<

1:30 PM-2:00 PM

TG

Tom Gioielli

18 minutes (14.03 mi)

# Dynamics 365 Field Service Scheduling/Dispatching



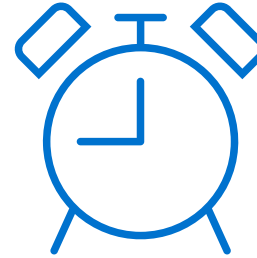
## Location

- Field Service determines travel time & distance based on the location of the resource at the requested time (home base or prior work order).
- Work can be location agnostic, which ignores all geographic settings & travel time.



## Skills/Characteristics

- Indicate resource skills based on custom rating systems.
- Required or desired certifications or licensure.
- Define required characteristics on Work Order Requirements.



## Availability

- Is there enough time for travel & the estimated work to be completed?
- Resource calendar & work hours, including vacation requests or breaks.



## Preferences

- Customer records can be updated to indicate preferred or restricted resources.
- Resource Types can be defined for each Work Order or Incident type.



# Dynamics 365 Field Service

## Other Connected Functionality



### Guides/HoloLens/Remote Assist

- Connect a Work Order to a HoloLens guide to provide an augmented reality guide for installation or repair of an item.
- Allow a technician using a HoloLens or the Remote Assist mobile application to call in to an expert for real-time, augmented reality assistance during a Work Order.



### Internet of Things (IoT) Alerts

- Use Azure IoT to connect to sensors installed on equipment or customer assets.
- When thresholds are surpassed, warnings can trigger a case or Work Order automatically for the asset or recommend further action.

# 03

## Mobile Functionality

Learn how technicians can bring the power of Dynamics CRM Field Service into the field with them, improving the efficiency & communication of your team

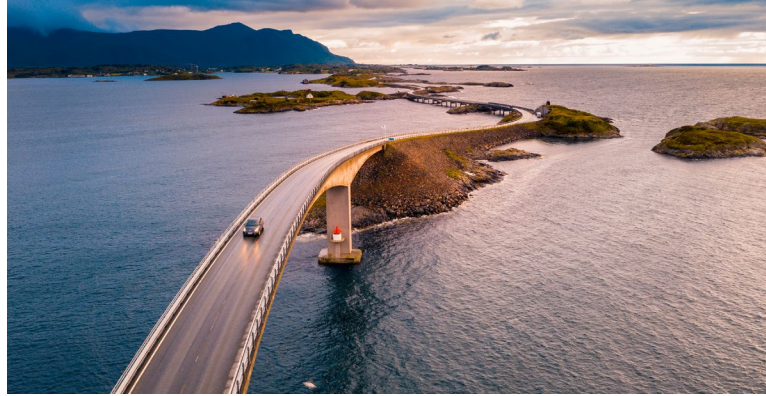


# Dynamics 365 Field Service Mobile Functionality



## Booking Updates & Work Details

Allow technicians to update status & materials used, gather pictures or signatures, & more from any cell phone or tablet with the Microsoft Field Service App.



## Location Services

Give technicians directions to the next job from their preferred app & allow dispatchers to see technician locations on the schedule board.



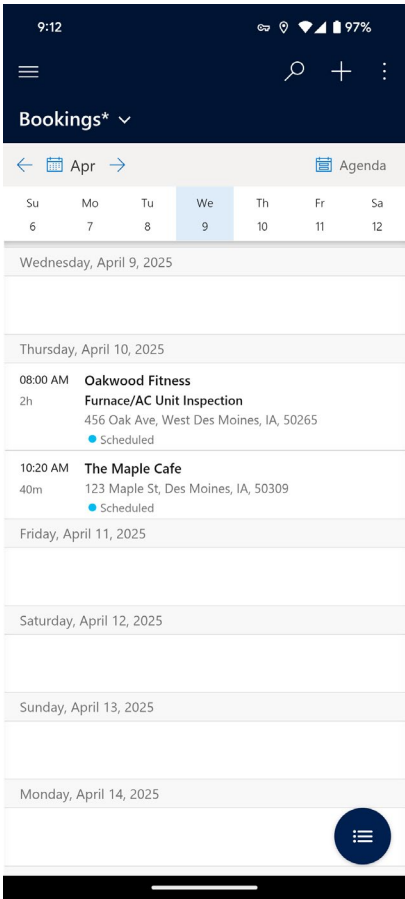
## Offline Sync

Don't let work in remote locations stop your resources from getting the information they need to perform. Field Service allows them to download & sync data so they can continue to work, even without an internet connection.

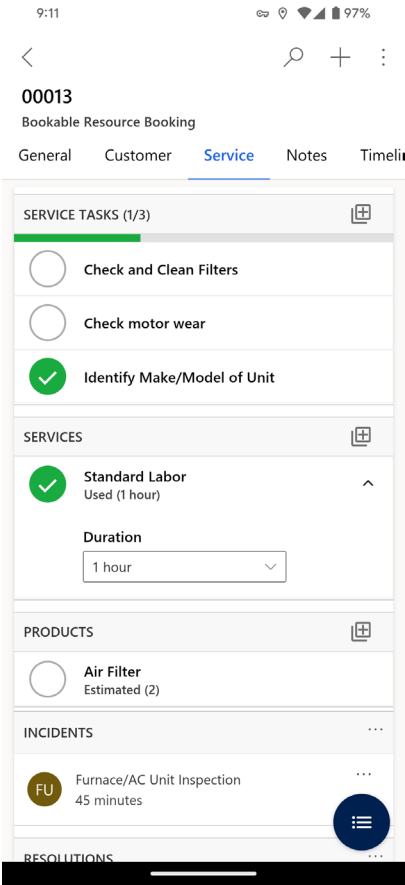


# Dynamics 365 Field Service Booking Updates in the Mobile App

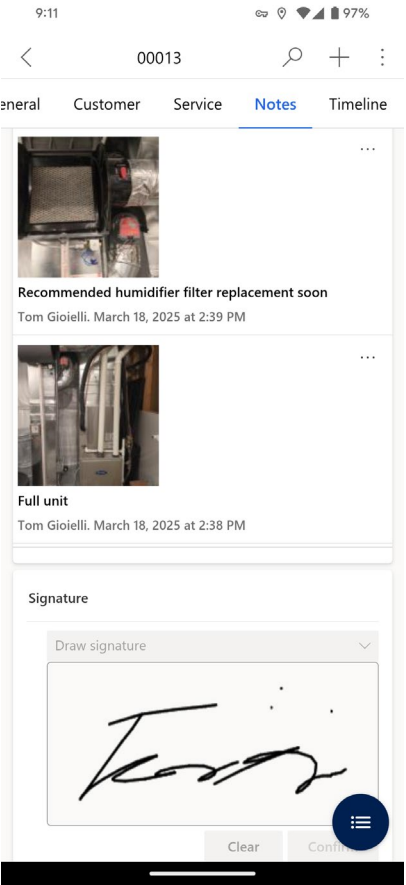
## Resource Agenda



## Tasks, Products, & Services



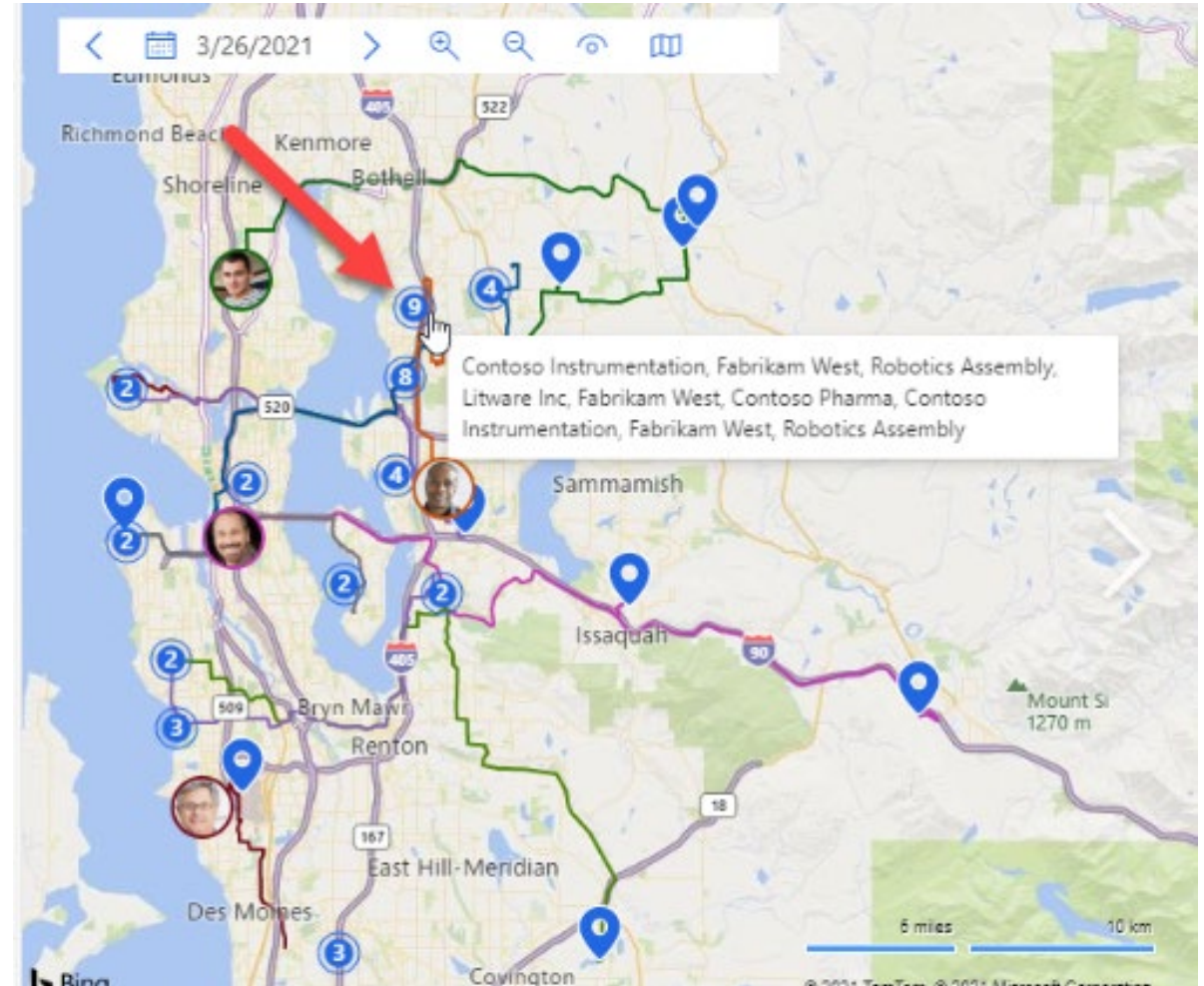
## Attach Photos & Signature



# Dynamics 365 Field Service Mobile Functionality

## Resource Location & Geofences

- Enable location GPS tracking in the mobile app or integrate with your own GPS location services.
- See real-time location of resources in your schedule board, along with routes for daily jobs.
- Create “fences” around jobs & trigger actions when a resource passes in or out of the area.



# Dynamics 365 Field Service

## Mobile Functionality

### Mobile Offline

- Create profiles that selectively sync data with the mobile app, allowing it to be used even while offline or in a remote area without service
- Prevents disruption of service for resources by ensuring all their data is always available
- Options to determine frequency of synchronization by table
- When the mobile device comes back online, changes are synced with Dataverse automatically



# 04

## Upcoming Features

Take a sneak peak at some of the exciting feature updates coming to Field Service in the next year

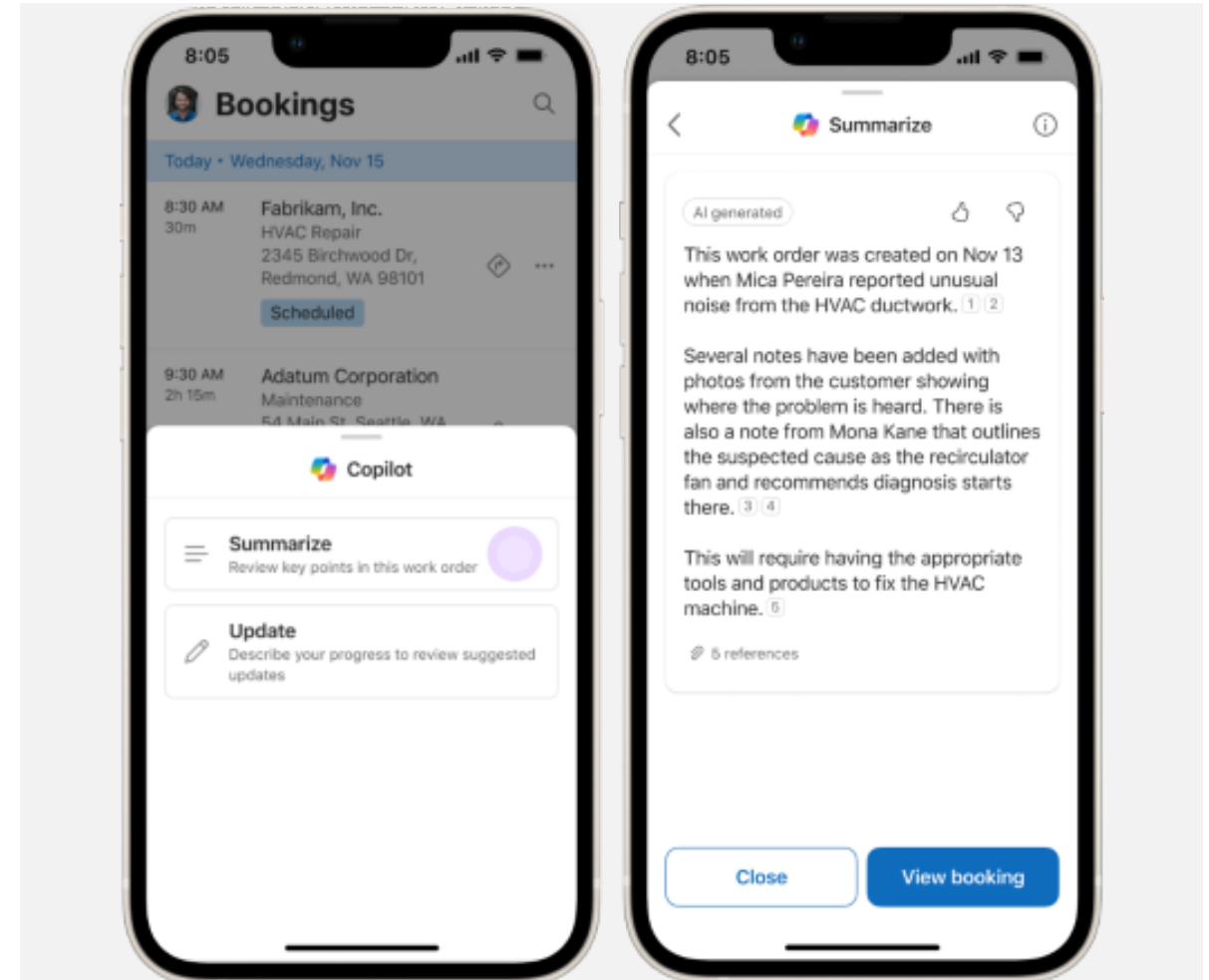




# Dynamics 365 Field Service Upcoming Features

## Copilot for the Mobile App

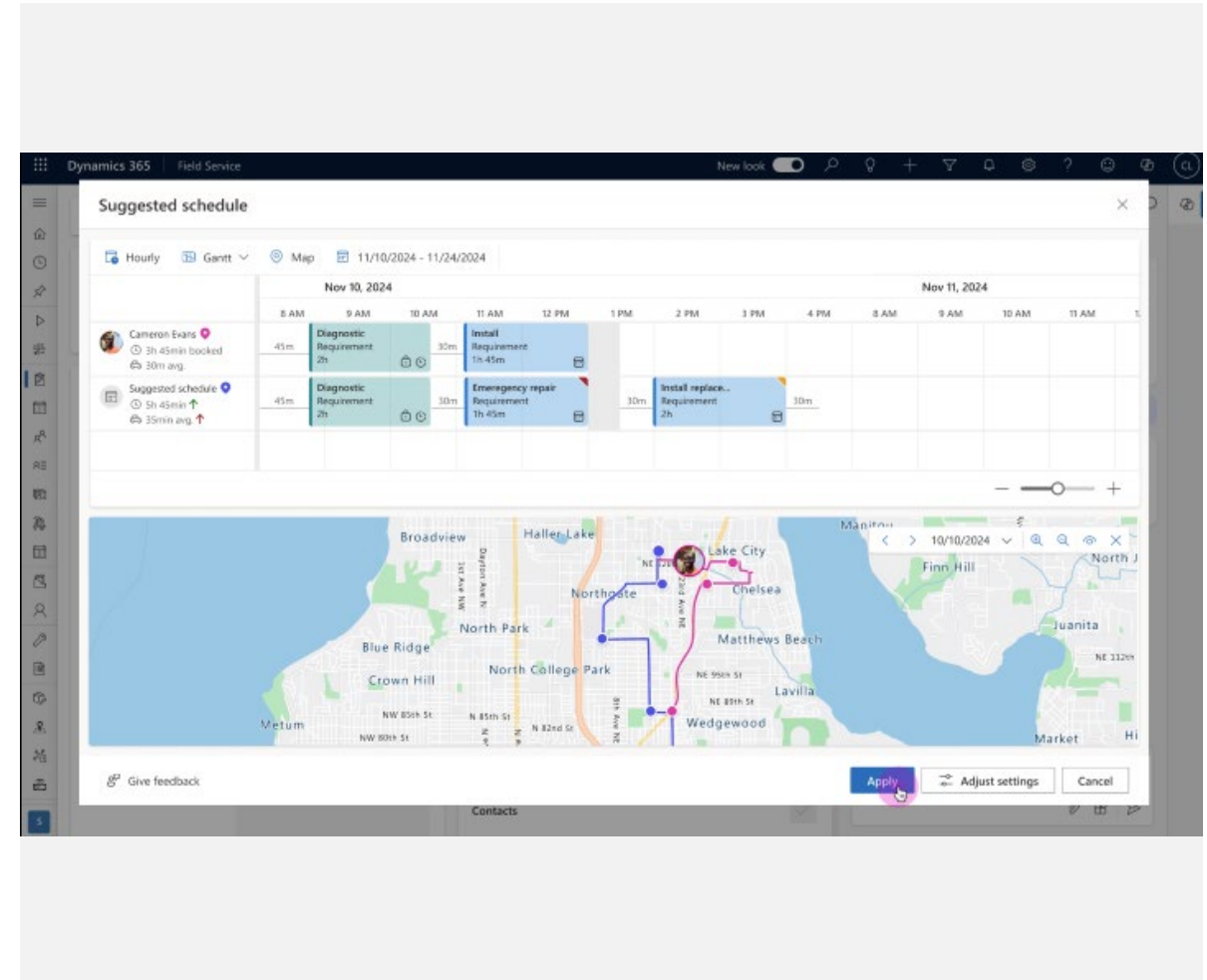
- Allow technicians to quickly & easily generate a Copilot Summary of the Work Order & related records, such as tasks, products, & timing
- Technicians can use their voice to describe progress on the Booking, & Copilot will suggest updates to the booking record
- Expected availability in Spring 2025



# Dynamics 365 Field Service Upcoming Features

## Copilot Suggested Schedules

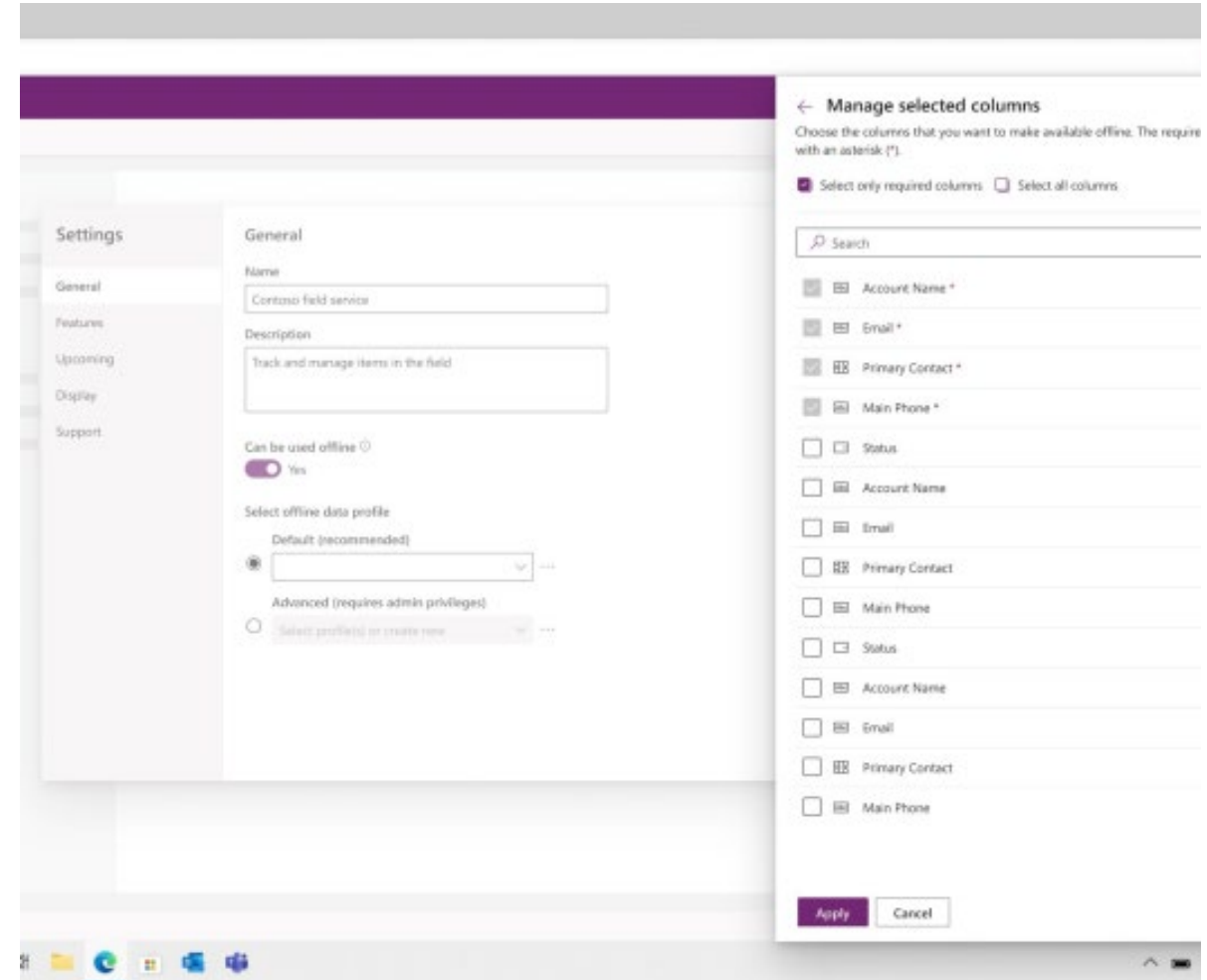
- Ask Copilot to suggest schedules for resources based on open requirements
- Define goals, such as Maximizing Utilization or reducing travel time
- Consider predictive travel time & required characteristics
- Preview Spring 2025, General Availability Fall 2025



# Dynamics 365 Field Service Upcoming Features

## Mobile Offline Column Selection

- Mobile Offline profiles will now allow selecting specific columns to sync, reducing bandwidth requirements & speeding up the offline process
- Pairs with Mobile Offline Application Insights for Admins to get the full picture of how the feature is being used
- Available April 2025





Business  
Technology  
Services

## Questions?



# Contact

## Thank you

### Forvis Mazars



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