User Guide

Microsoft Dynamics 365 for Service Management v1.4

September 2024







Gold Enterprise Resource Planning Gold Small and Midmarket Cloud Solutions Silver Cloud Customer Relationship Management



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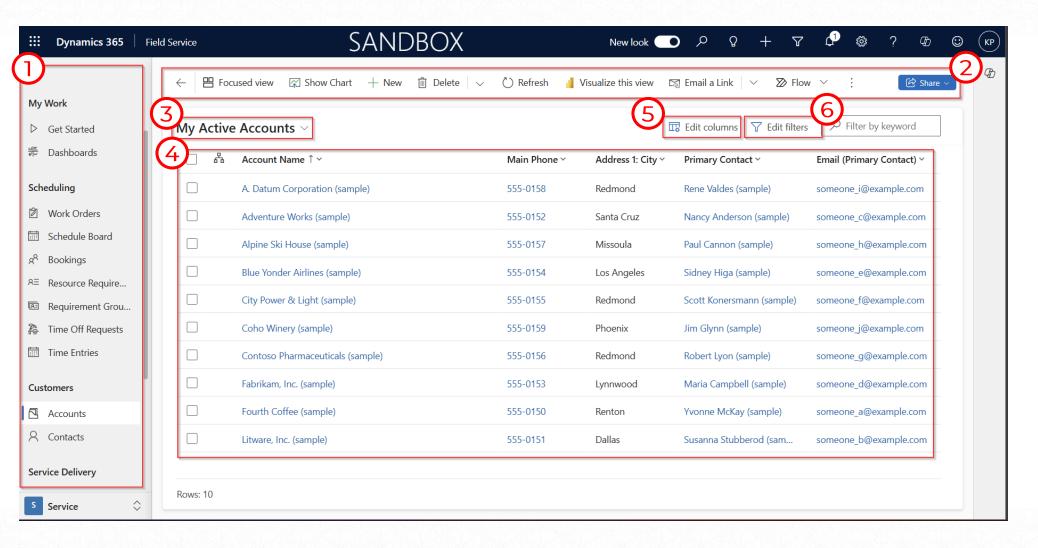
Contents

- Setup and Configuration
- Resources
- Assets
- Work Orders
- Maintenance Requests
- Agreements
- Purchase Order / Inventory



Navigating the Dynamics 365 Interface





- Side Menu Contains all modules available for the app.
- Command Bar Contains various options for the current module.
- Change View Change the way the current data is presented.

Table

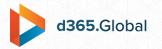
- The list of records for the current module, filtered by the current view. Use it like an Excel spreadsheet.
- **Edit Columns** Add or remove existing fields/column headings to the table.
- **Fdit Filters** Change the advanced filters on the data.

A Guide to Common Form Fields



Field Type	Example	Description
Plain Text/Number		Plain text or number. Some fields will limit your character length, or set a particular range for your numbers.
Validated Text Box		Requires the user to input data that matches the prompt. E.G. an email must have an @ symbol and a suffix (.com, .me)
Date Selector		Pick a date with the on-board calendar. If your date settings seem wrong (i.e. American format), go to Personalisation Settings and check your time zone.
Drop Down Select/Multi Select		Select an option from the drop down list. Some lists may have \square square boxes next to each option; this means you can select more than one.
Lookup		Opens a search bar where you can create a relationship to a different kind of record in Dynamics 365. Once set, you can click on the field's content to be taken to that record.

Setup and Configuration



The Dynamics 365 **Field Service** deployment follows the following Service Flow, Refer to the attached diagram:

Primary Field Service Flow

Work Order Creation

- How are work orders created?
- What information is entered?
- When is a work order ready to be scheduled?

Schedule & Dispatch

- How are items scheduled?
- Manually? Semi-Automated?
- Automated Routing?

Work Order Generation

Schedule & Dispatch

Service Delivery Review & Bill

Service Delivery

- What do field technician need to access?
- What information will they be entering?

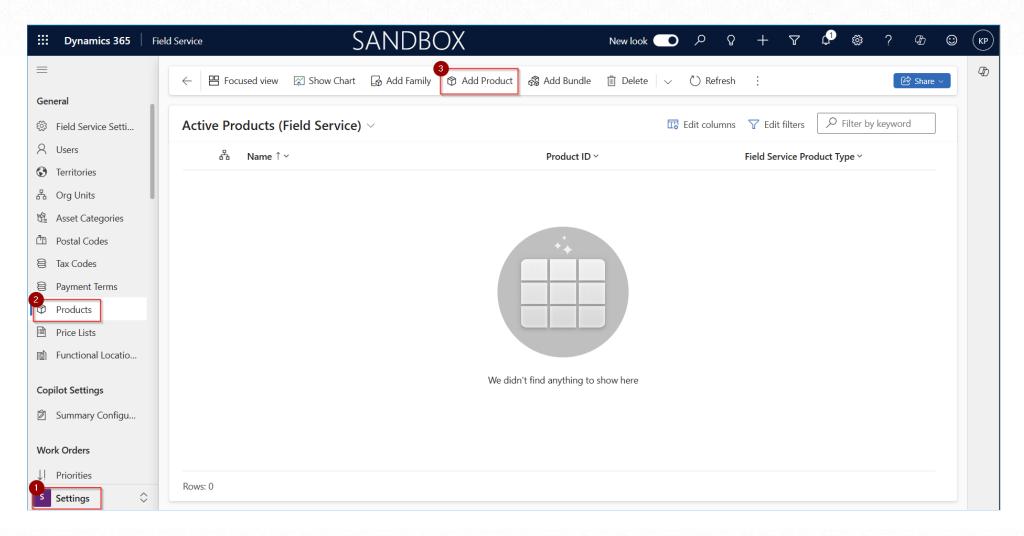
Review & Billing

- How is follow up work dealt with?
- How are billing and inventory adjustments carried out?



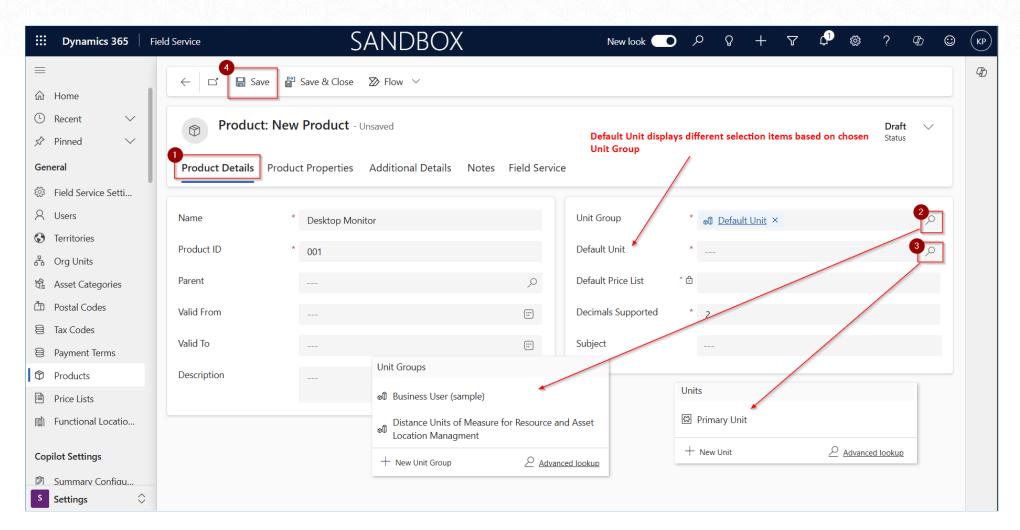
Begin setting up your products in Field Service by defining the product type for each product:

1. Go to the
Settings change
area -> Products
-> Add Product



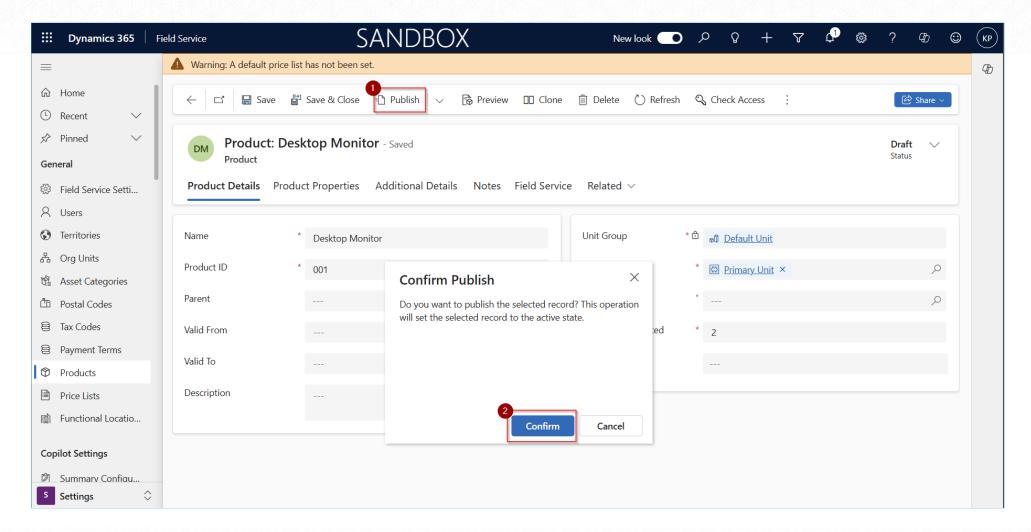


2. Fill in the required details. Set how the product record is measured for pricing then click Save.



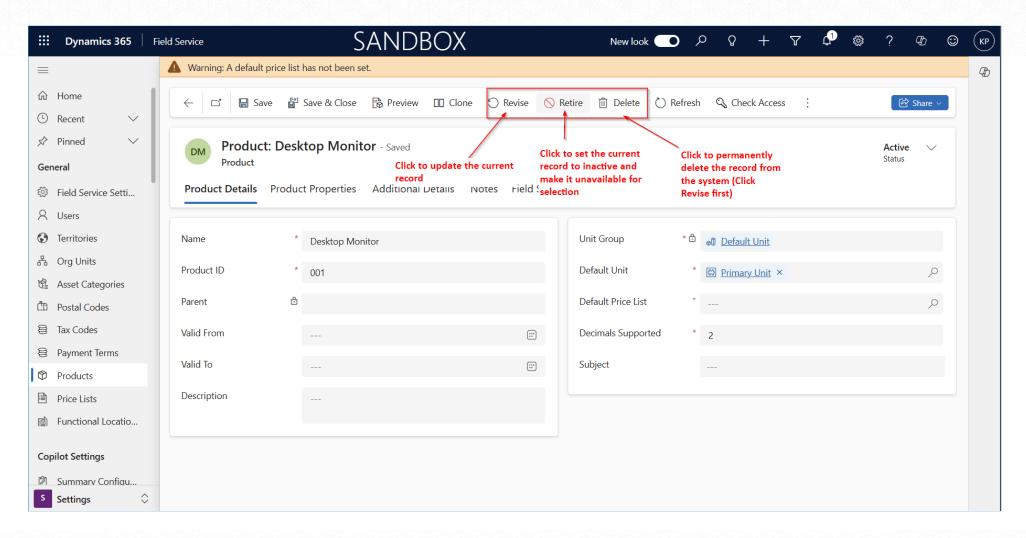


3. Click Publish to make the product record available for selection. Click Confirm when prompted.
Repeat steps as needed if adding multiple products.





Other functions are available for published product records. Refer to the screenshot for details.



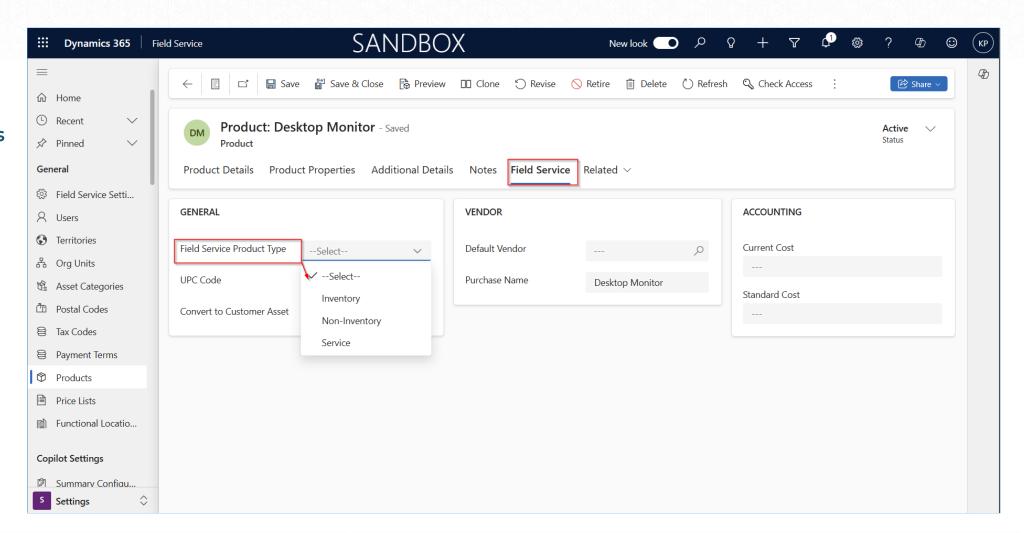


Product records have 3 classifications:

Inventory - Products whose inventory levels are tracked and deducted from inventory when sold.

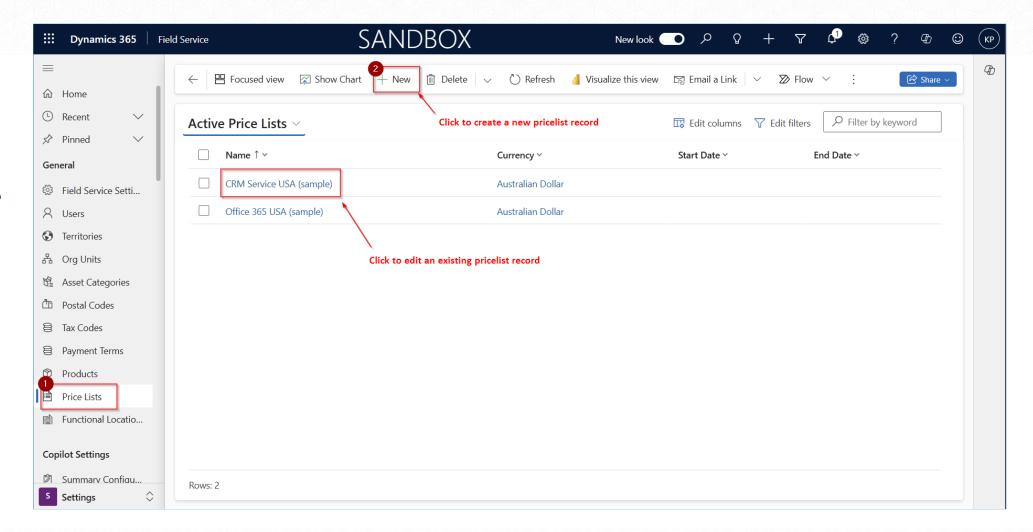
Non-Inventory Products that are sold
to a customer but are
not tracked in
inventory. Noninventory products
might include zip ties
or cables, or contract
items such as lawn
care services which
are billed for the same
amount each month.

Service - Services that are sold on a timeand-materials basis.



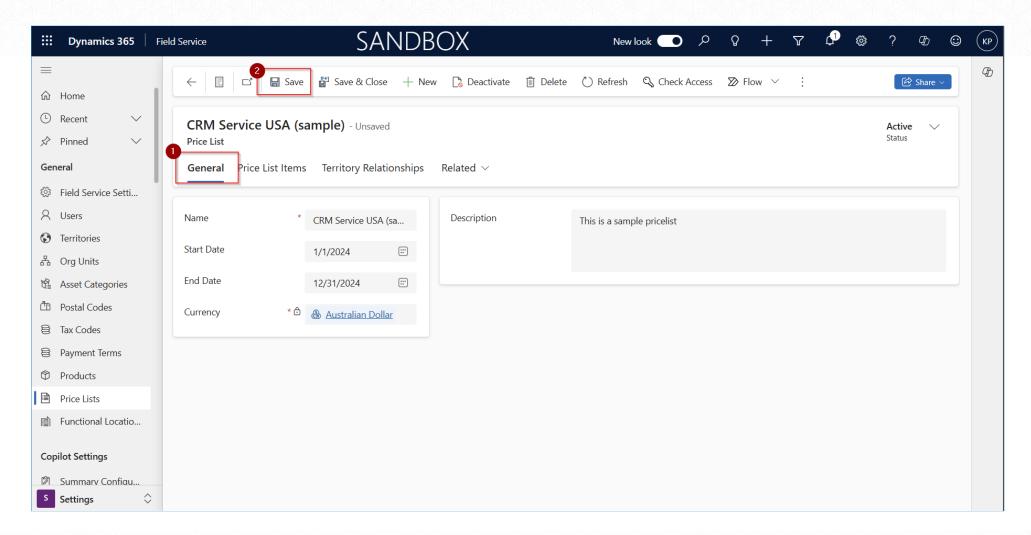


To ensure you're charging the correct amount for products and services associated with work orders, you must associate each product and service with one or more price lists. Price lists define available pricing levels. Multiple price lists can be set up based on organization's pricing practices.



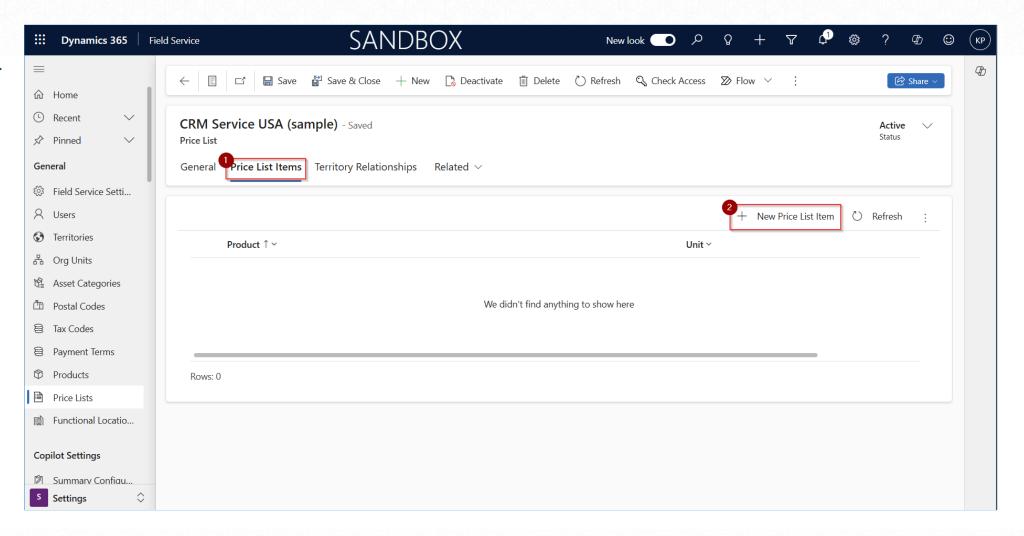


1. Fill in the required details then click Save.





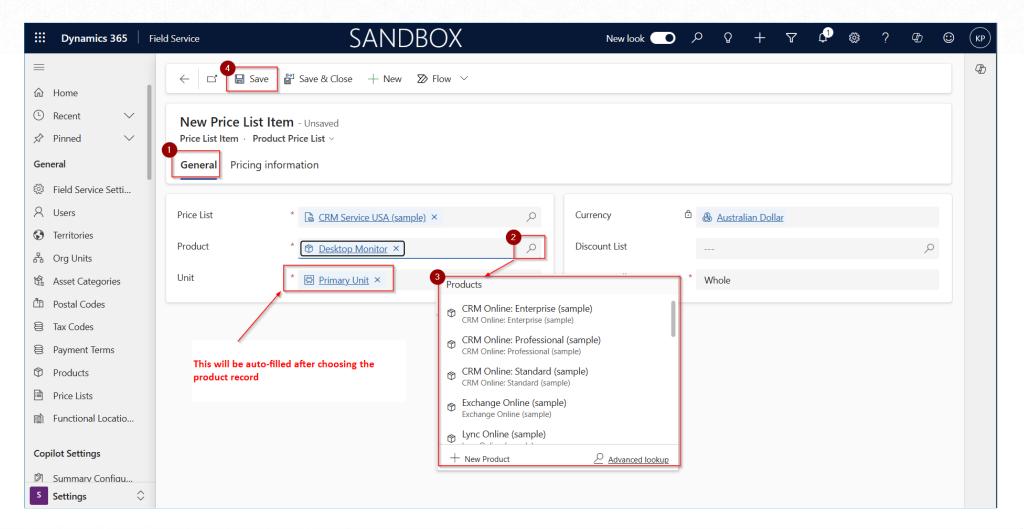
2. Go to Price List Items and click + New Price List Item.



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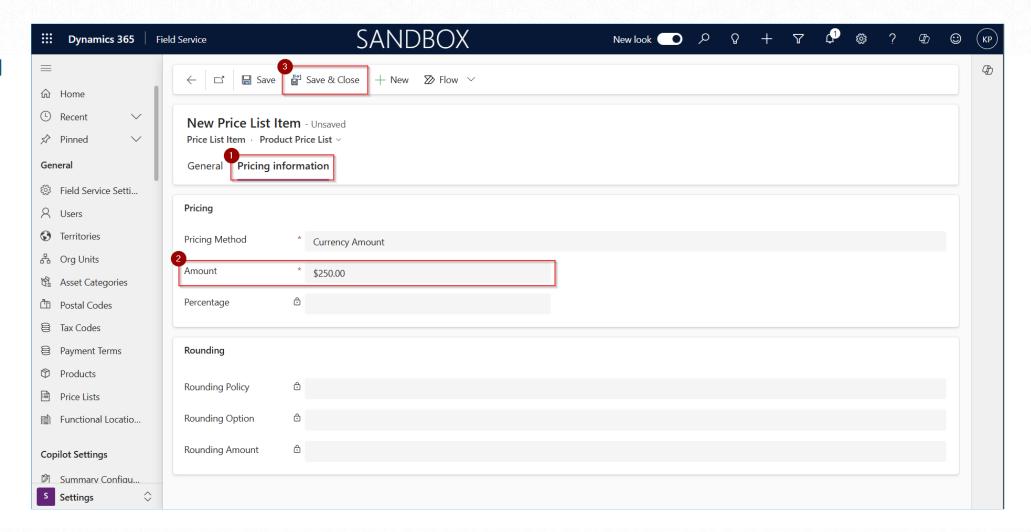


3. Add the product pricing details then click Save.





4. Click Pricing information and enter the amount. Click Save & Close. Repeat steps as needed if adding multiple product prices.

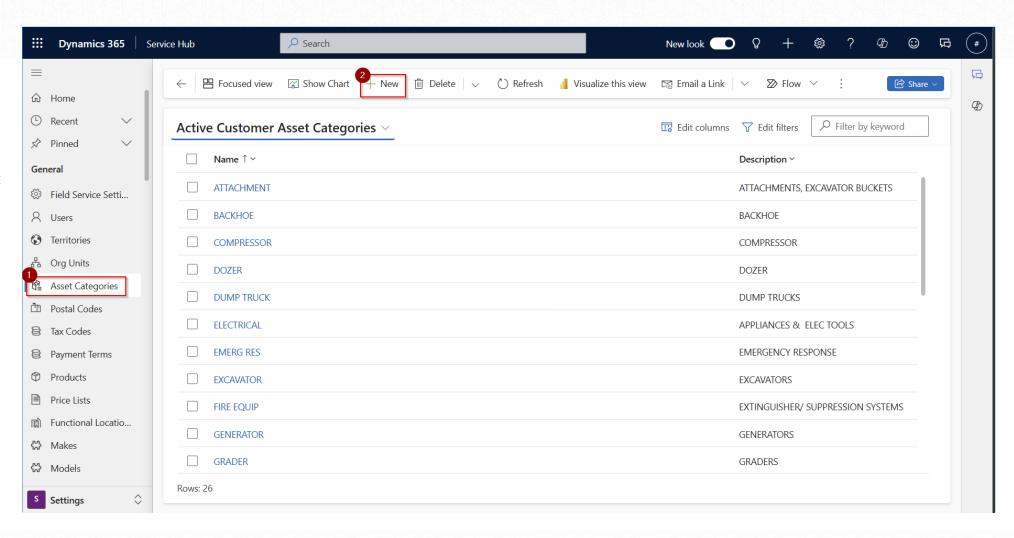


Setup and Configuration – Asset Categories



Field Service enables you to maintain Asset Categories used to classify customer assets (e.g., construction tools. office equipment, etc.):

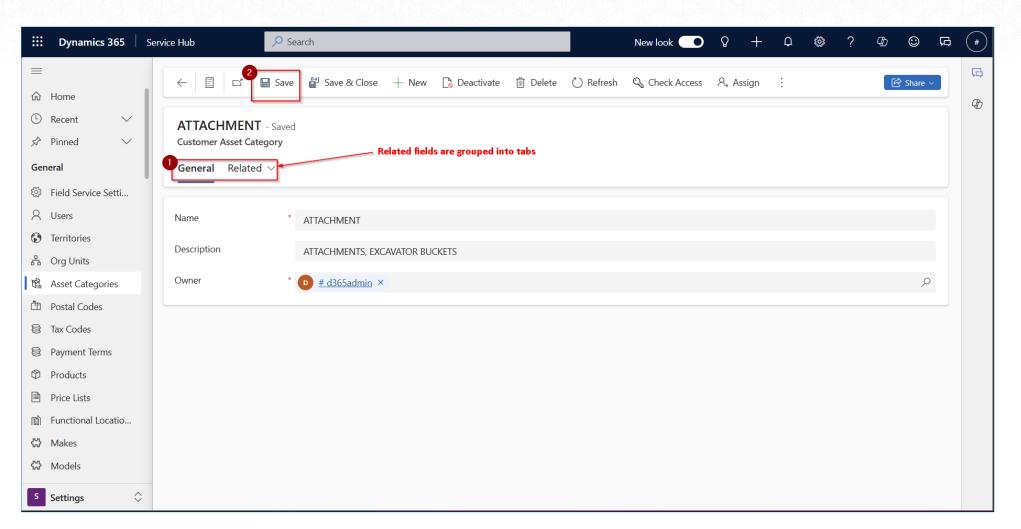
- Go to Settings -> General -> Asset Categories.
- Click + New.



Setup and Configuration – Asset Categories



3. Enter the Asset
Category and click
Save. Repeat steps
as needed if
adding multiple
Asset Categories.

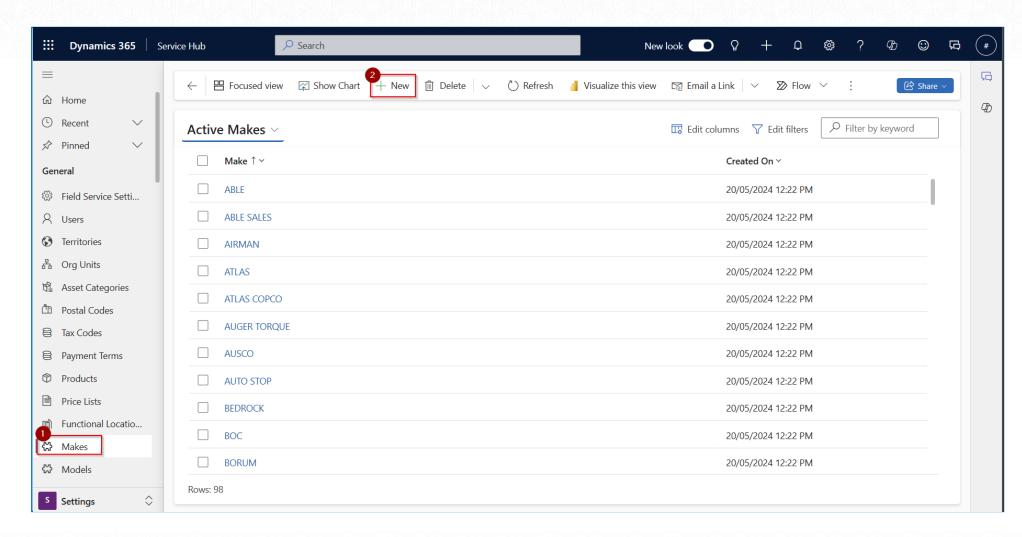


Setup and Configuration – Makes



This menu lists records of brands for equipment used by the organization.

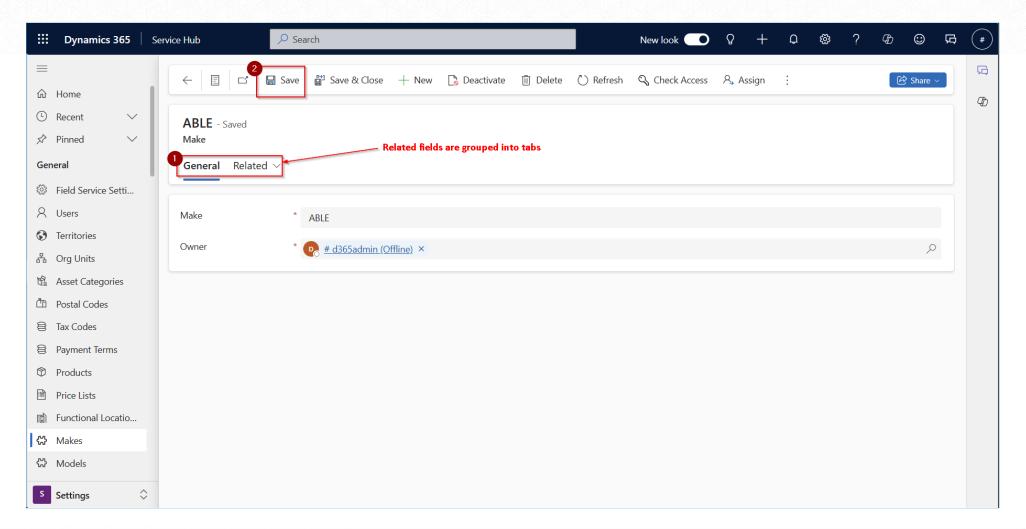
- Go to Settings -> General -> Makes.
- 2. Click + New.



Setup and Configuration – Makes



 Enter the details and click Save. Repeat steps as needed if adding multiple records.

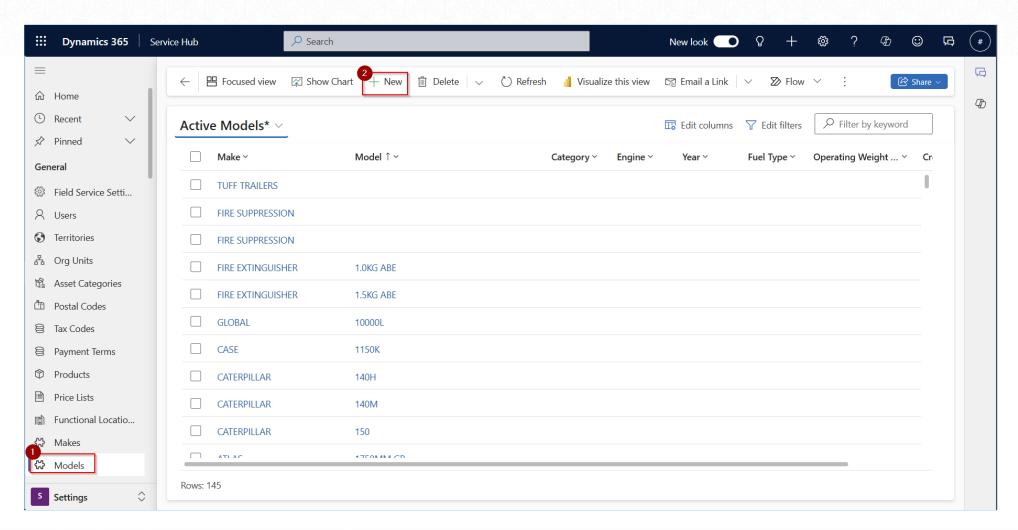


Setup and Configuration – Models



This menu lists records of models for equipment used by the organization.

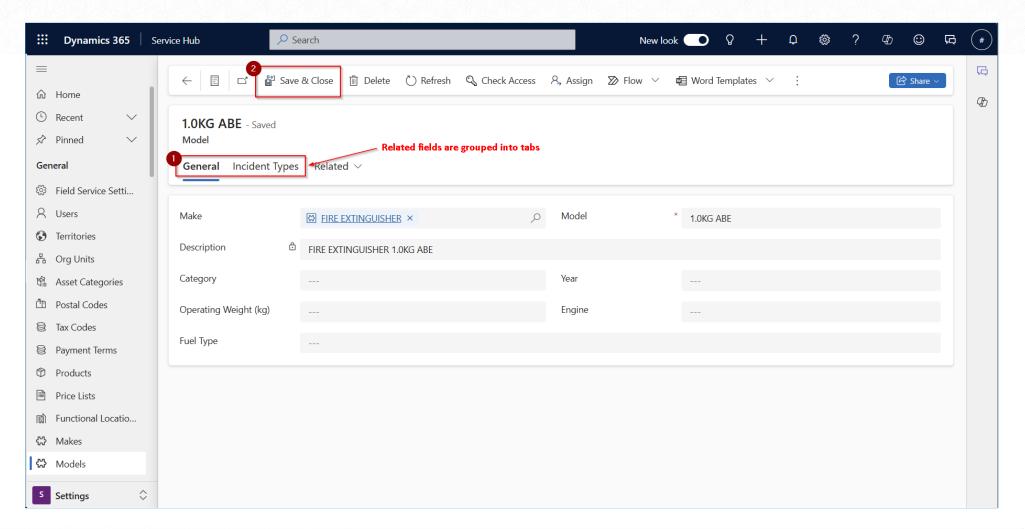
- Go to Settings -> General -> Models.
- 2. Click + New.



Setup and Configuration – Models



 Enter the details and click Save. Repeat steps as needed if adding multiple records.

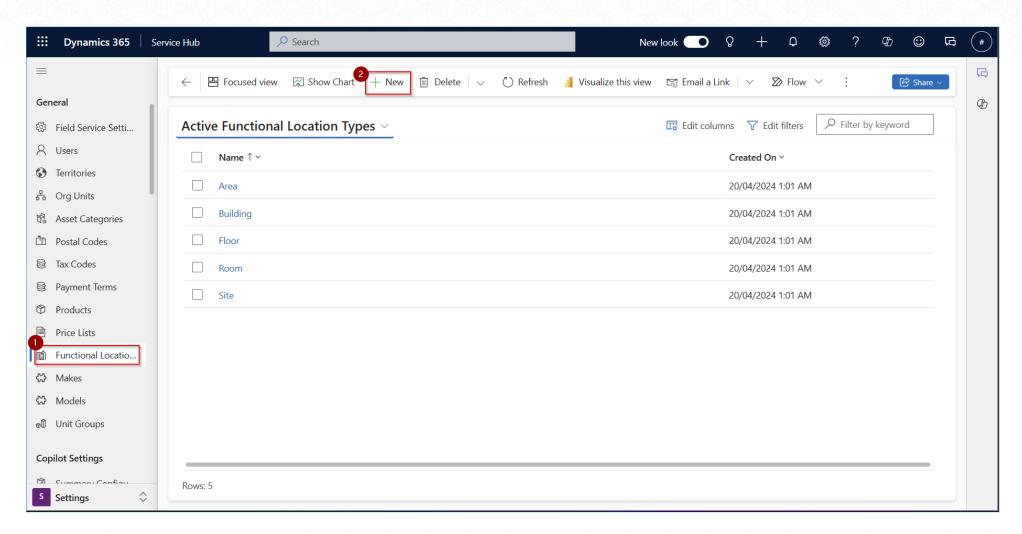


Setup and Configuration – Functional Location Types



This menu lists records of locations where a customer equipment may be situated.

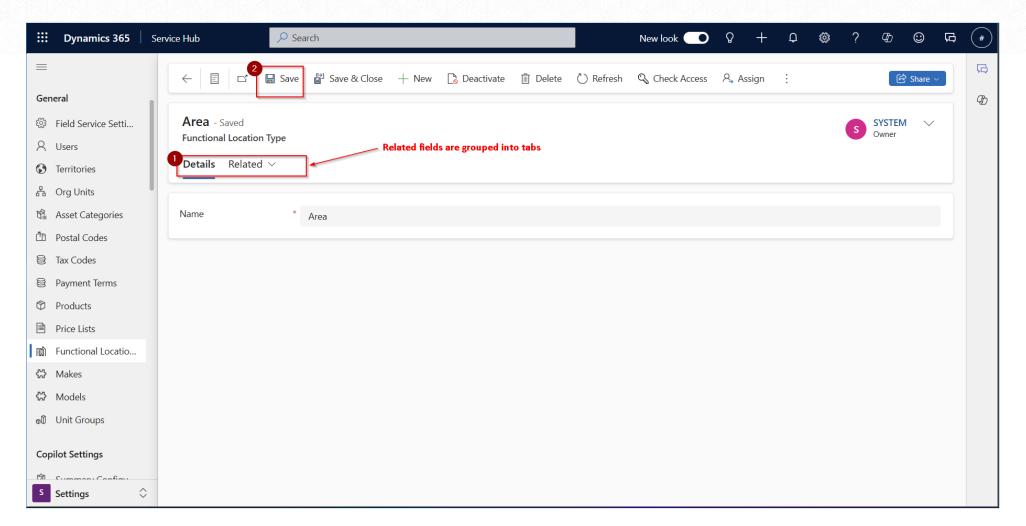
- Go to Settings ->
 General ->
 Functional
 Location Types.
- 2. Click + New.



Setup and Configuration – Functional Location Types



 Enter the details and click Save. Repeat steps as needed if adding multiple records.

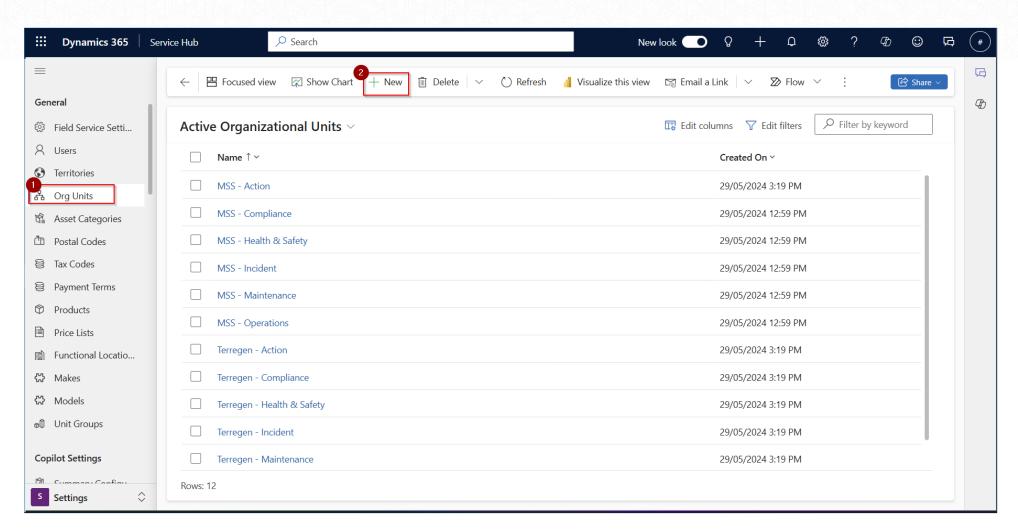


Setup and Configuration – Org Units



This menu lists records of MSS's organizational units.

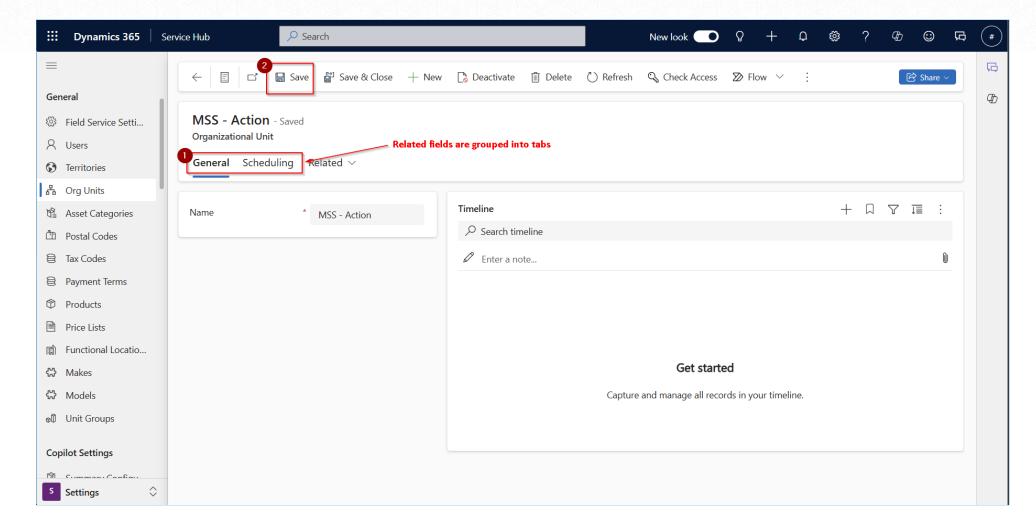
- Go to Settings -> General -> Org Units.
- 2. Click + New.



Setup and Configuration – Org Units



 Enter the details and click Save.
 Repeat steps as needed if adding multiple records.

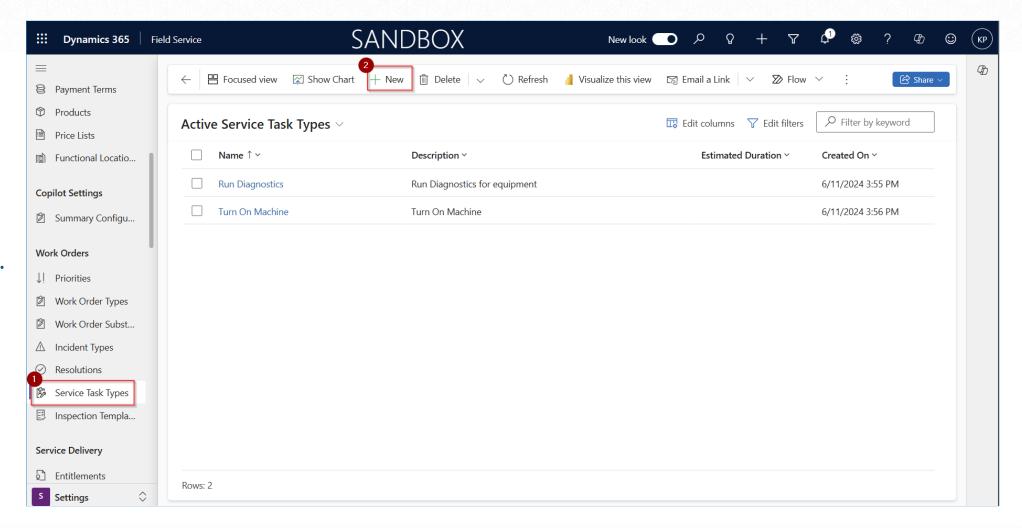


Setup and Configuration – Service Task Types



Field Service enables you to maintain Service Task Types that represent specific actions done when rendering a particular service to a customer:

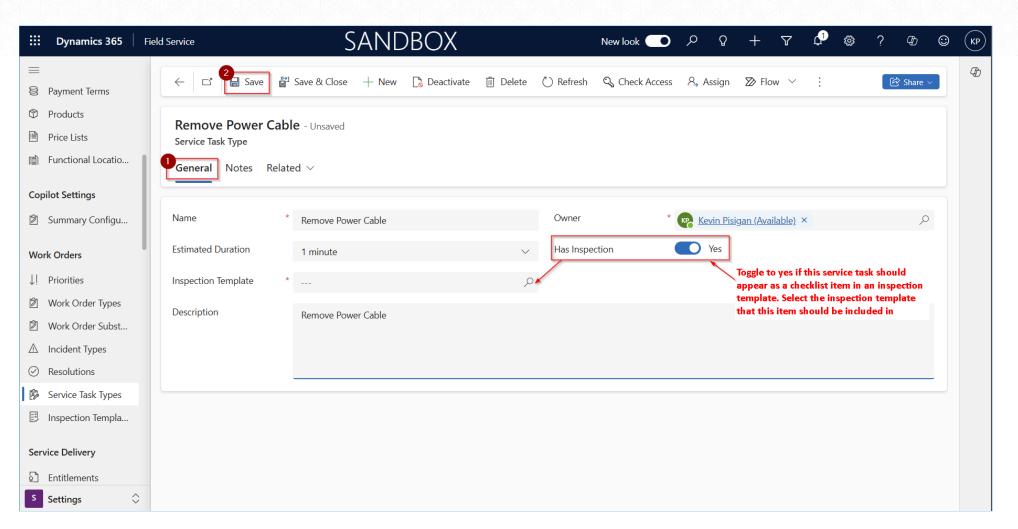
- Go to Settings ->
 Work Orders ->
 Service Task Types.
- 2. Click + New.



Setup and Configuration – Service Task Types



3. Enter the Service
Task Type and
other details, then
click Save. Repeat
steps as needed if
adding multiple
Service Task Types.

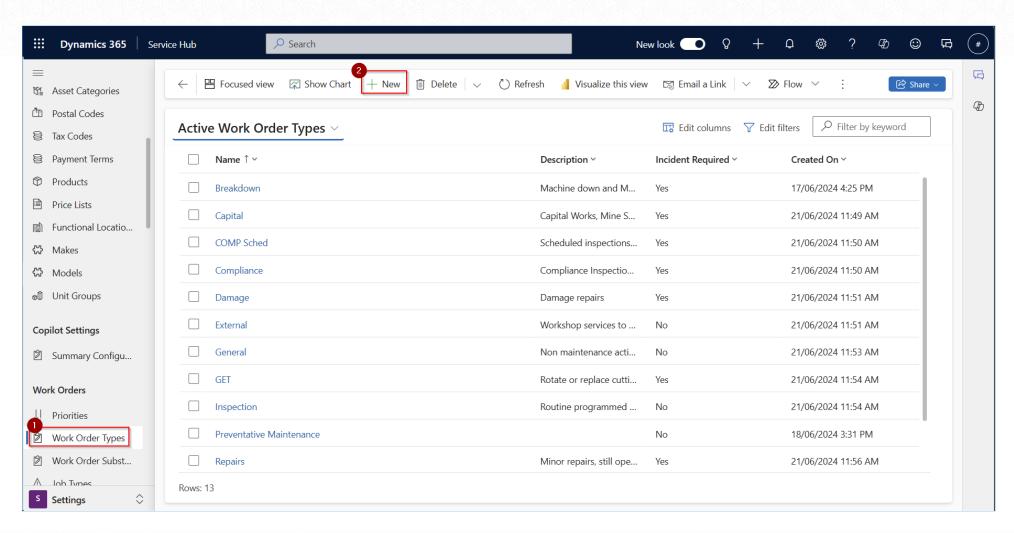


Setup and Configuration – Work Order Types



Field Service enables you to maintain Work Order Types used to classify work orders:

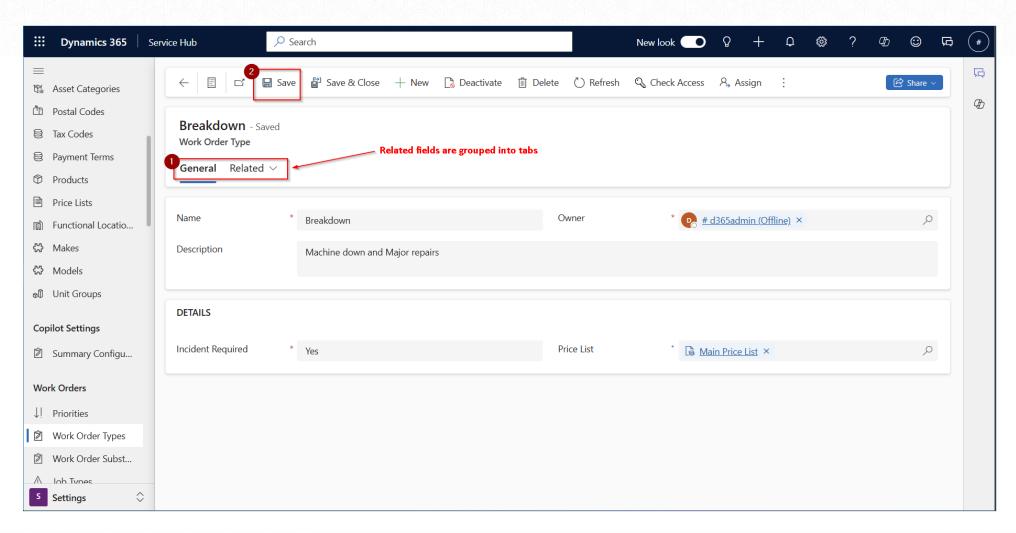
- Go to Settings ->
 Work Orders ->
 Work Order Types.
- 2. Click + New.



Setup and Configuration – Work Order Types



3. Enter the Work
Order Type and
other details, then
click Save. Repeat
steps as needed if
adding multiple
Work Order Types.

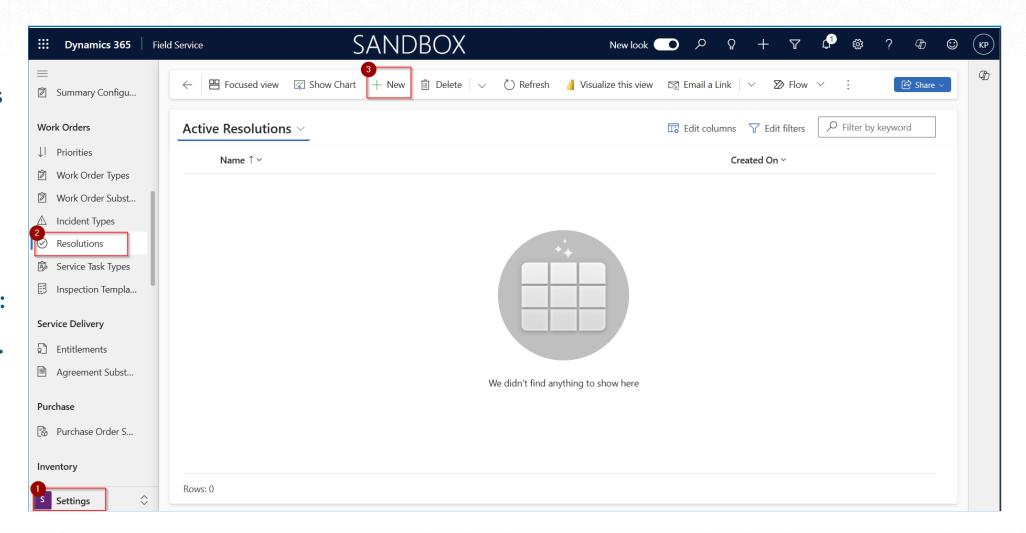


Setup and Configuration – Resolutions



Resolution records can be created to help provide details about how a work order is resolved. This applies to "common' issues is reported by one customer on a periodic basis or by multiple customers:

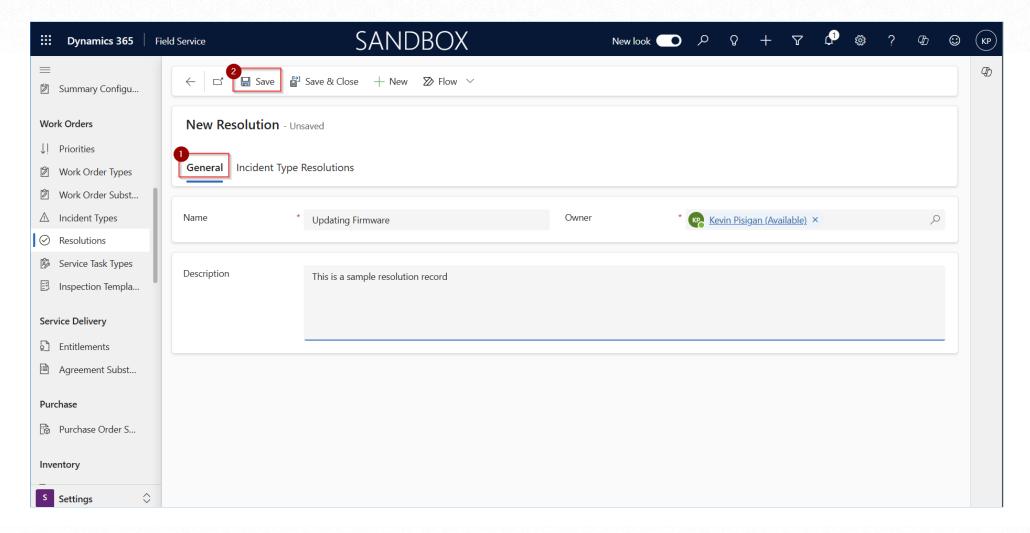
- Go to Settings ->
 Work Orders ->
 Resolutions.
- 2. Click + New.



Setup and Configuration – Resolutions



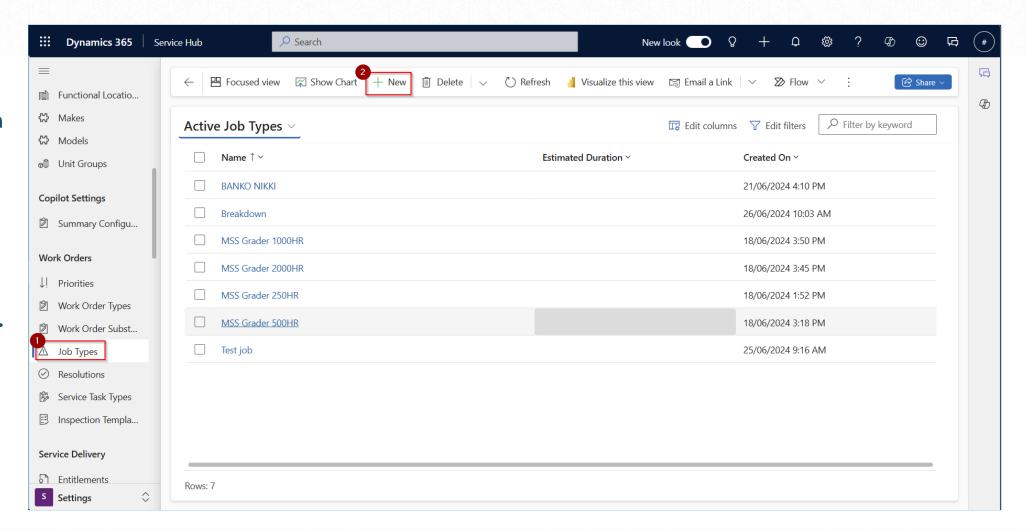
3. Enter the resolution name, description, and click Save.





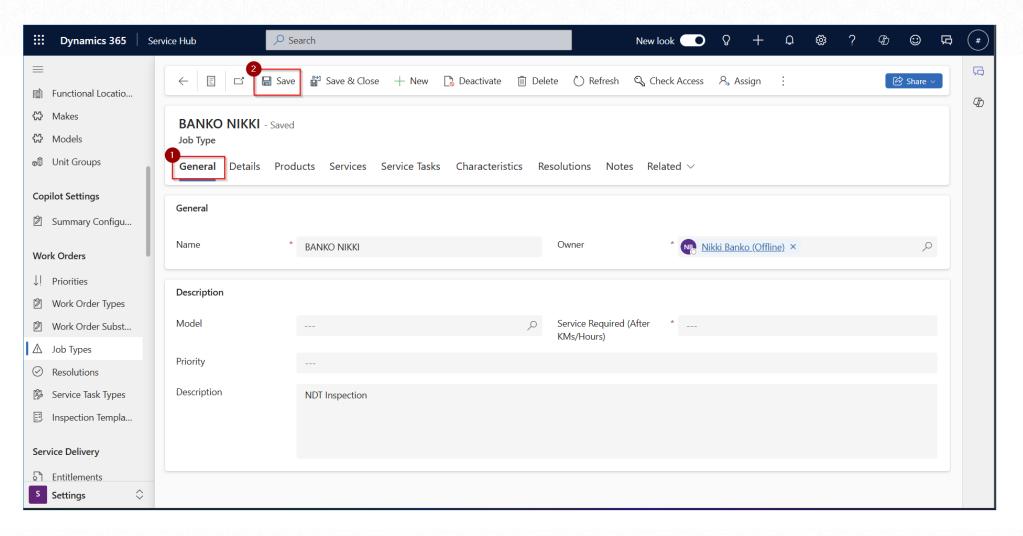
Job Types can be set up in Field
Service to simplify work order creation for common services being conducted on a regular basis(e.g., equipment inspections):

- Go to Settings -> Work Orders -> Job Types.
- 2. Click + New.



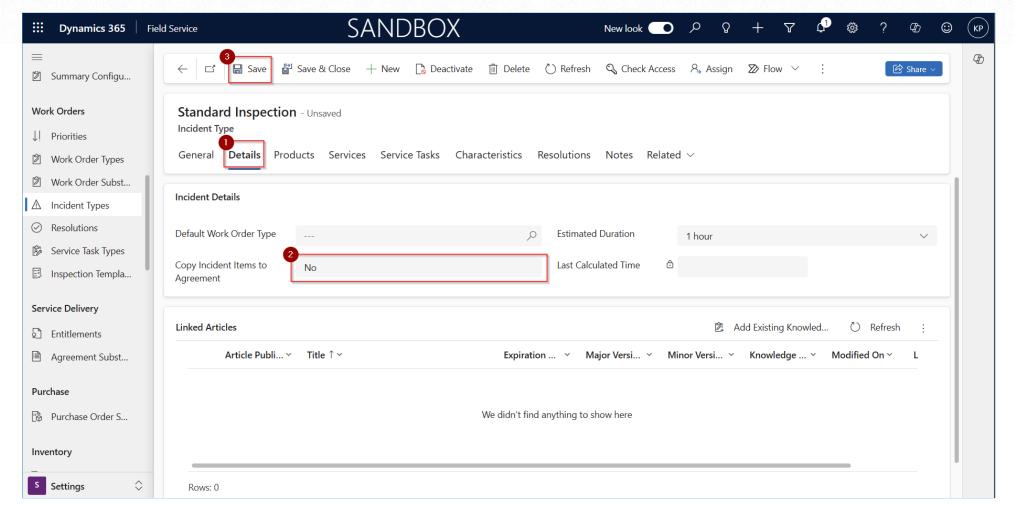


3. Enter the name of the job type, description, and click Save.



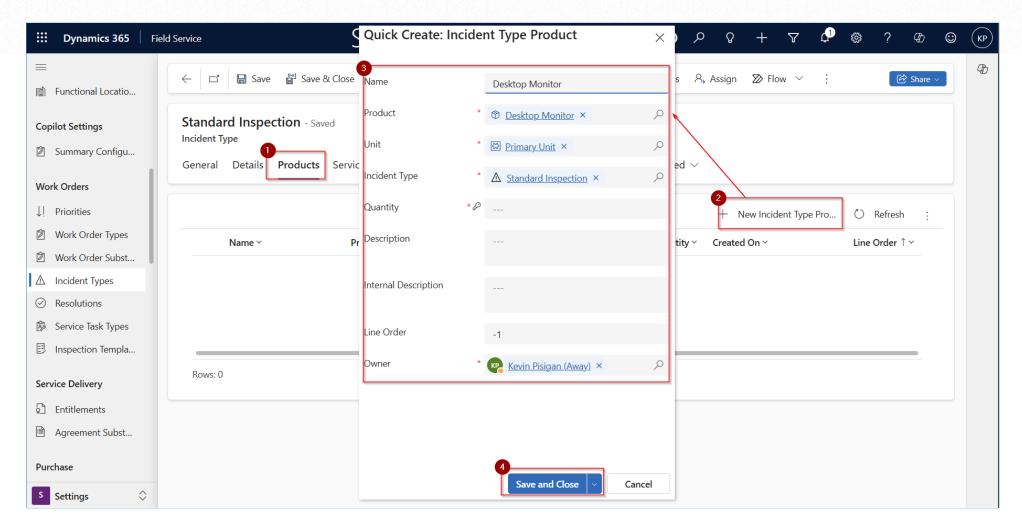


4. Go to Details then enter estimated duration. Toggle the field Copy Incident Items to Agreement to Yes to copy details of incident type in agreements. Click Save.



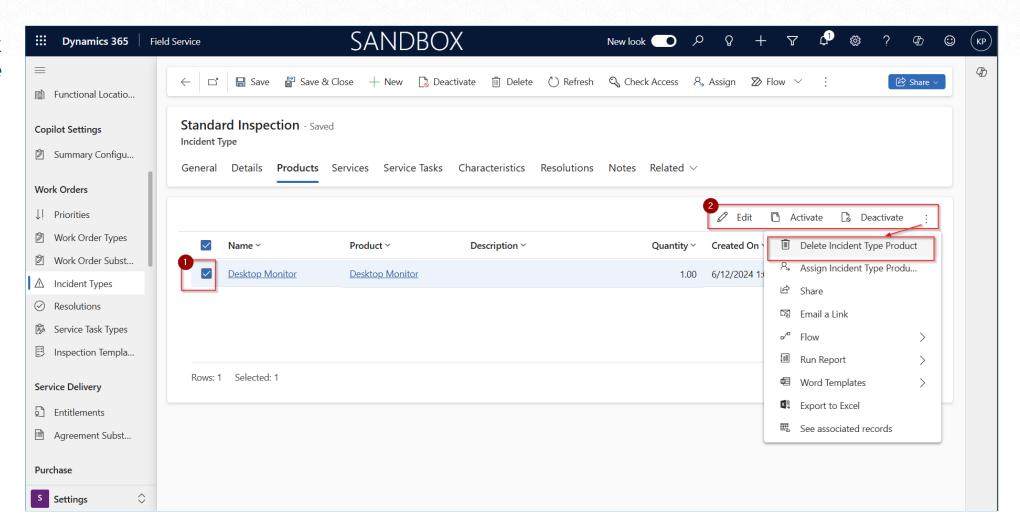


5. Go to Products tab to add product records to incident type. Click New Incident Type Product. Repeat steps if adding multiple product records.



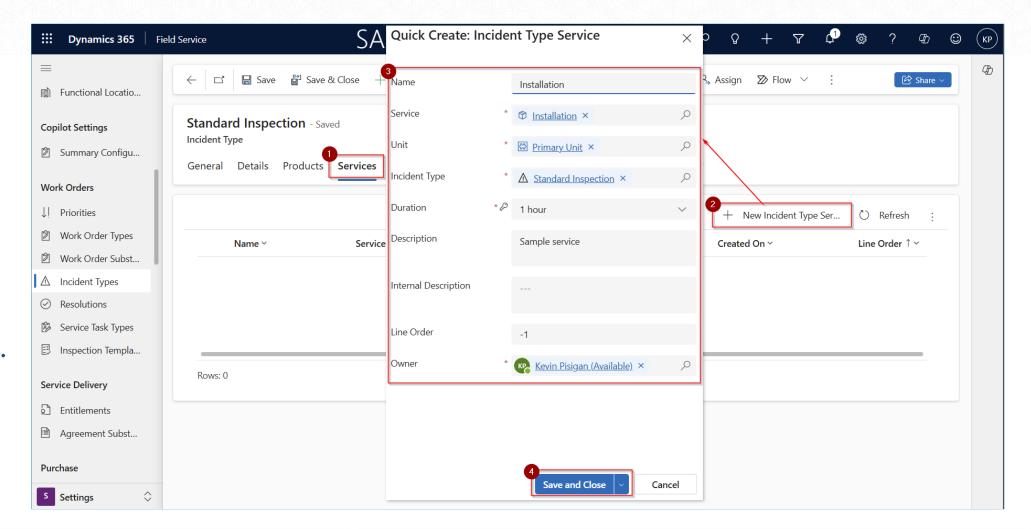


6. [OPTIONAL] Tick an Incident Type product to view additional functionalities.



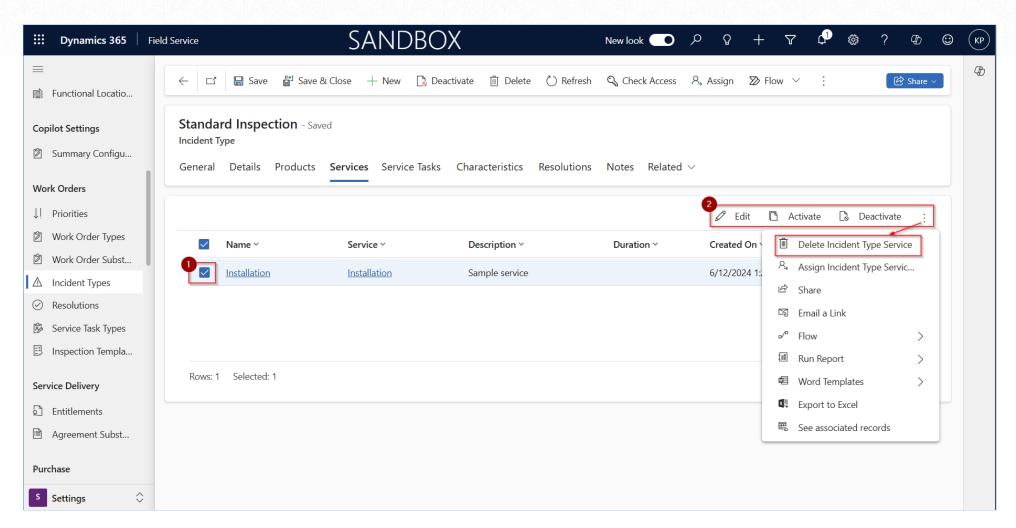


7. Go to Services
tab to add
product service
records
classified as a
service to
incident type.
Click New
Incident Type
Service. Repeat
steps if adding
multiple
product records.



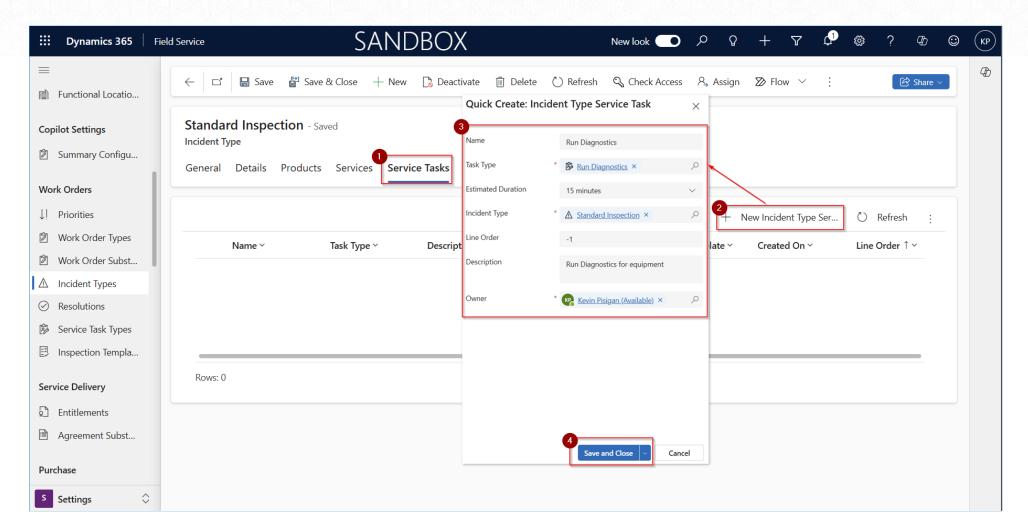


8. [OPTIONAL] Tick an Incident Type Service to view additional functionalities.



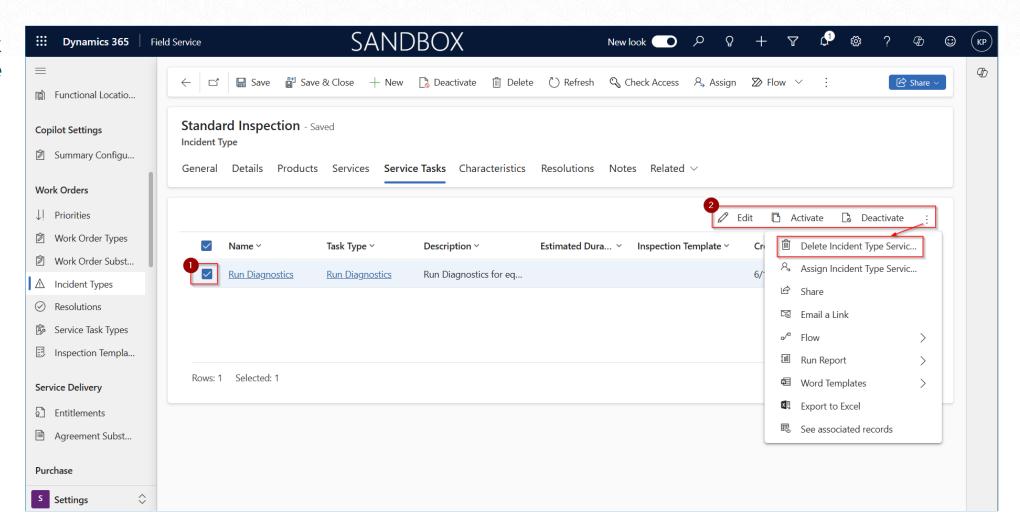


9. Go to Services tasks tab to add service task records. Click New Incident Type Service Task. Repeat steps if adding multiple records.





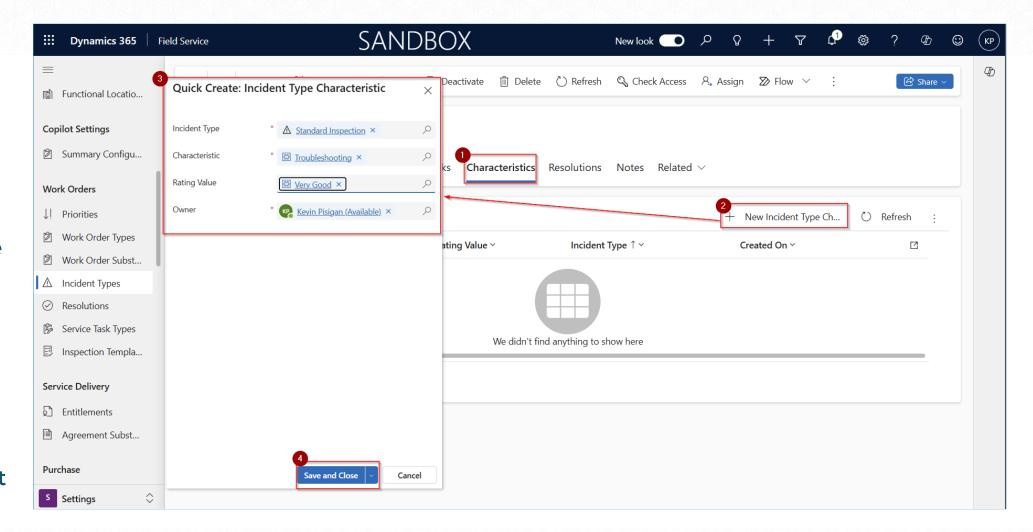
10. [OPTIONAL] Tick an Incident Type Service Task to view additional functionalities.





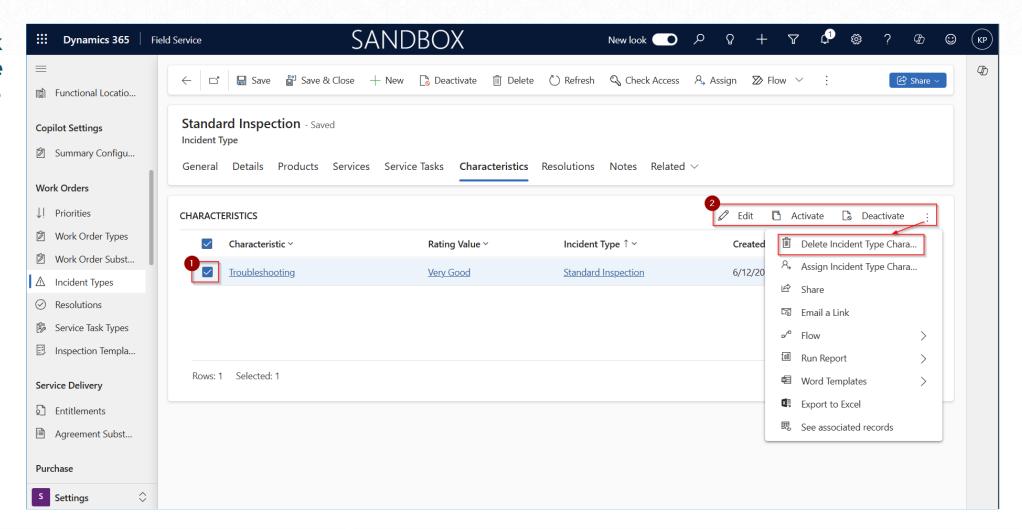
11. Go to
Characteristics
tab to add skill
records. Click
New Incident
Type
Characteristic.
Repeat steps if
adding multiple
records.

This facilitates matching to resources with the required skill when a work order of a specific incident type is created.



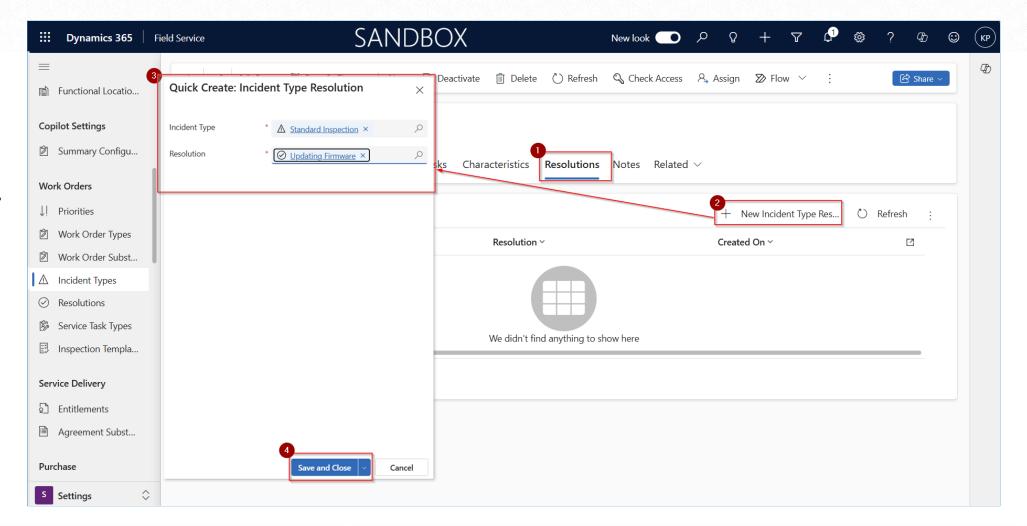


12. [OPTIONAL] Tick an Incident Type Characteristic to view additional functionalities.



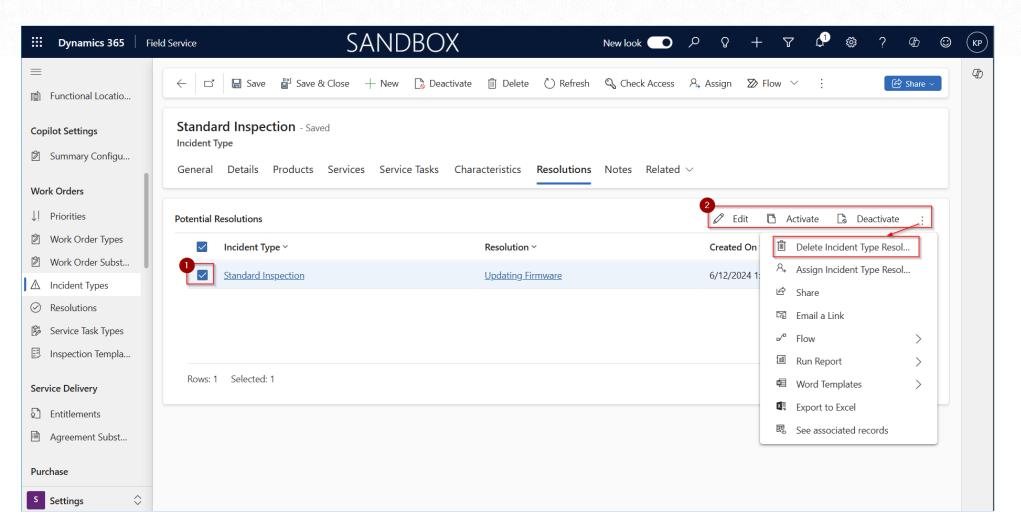


13. Go to
Resolutions tab
to add
resolution
records. Click
New Incident
Type Resolution.
Repeat steps if
adding multiple
records.



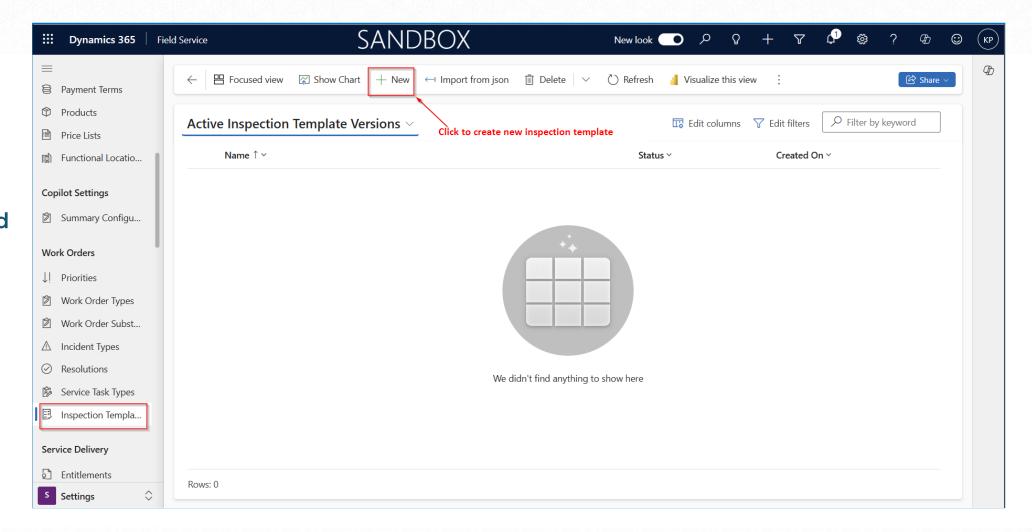


14. [OPTIONAL] Tick an Incident Type Resolution to view additional functionalities.



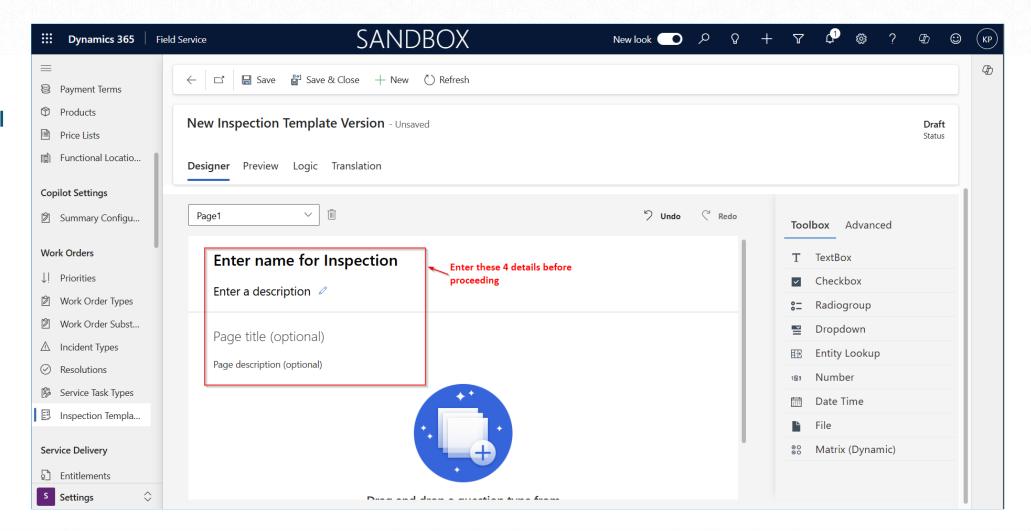


Inspections are digital forms that a technician can use to efficiently answer questions as part of a work order. A template needs to be created first then associated to a service type before a worker can use them on their field service mobile app when fulfilling a work order.



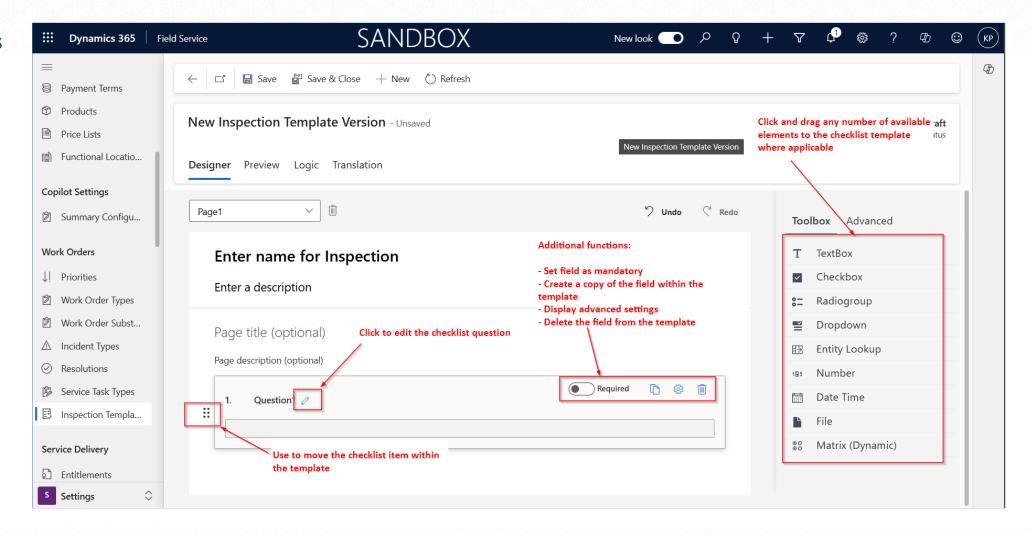


When clicking a new inspection template, the template editor will be displayed.



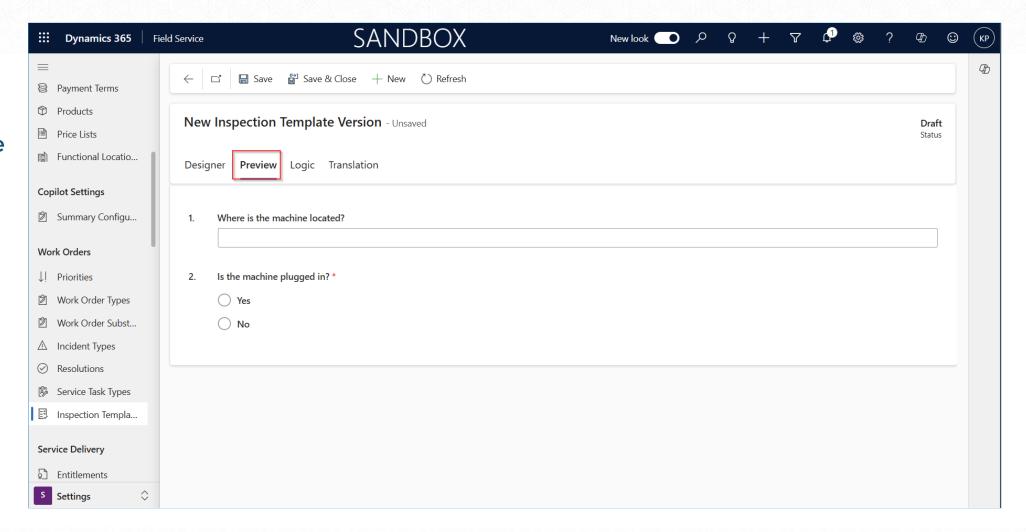


The editor provides a range of tools to create the inspection template.



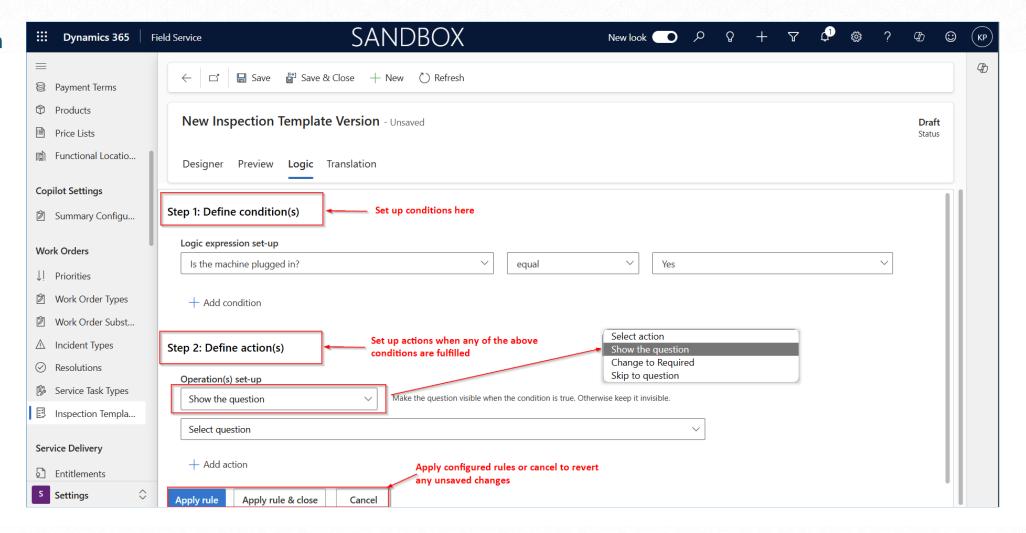


Preview tab displays the template as it will be shown in the Field Service Mobile app.



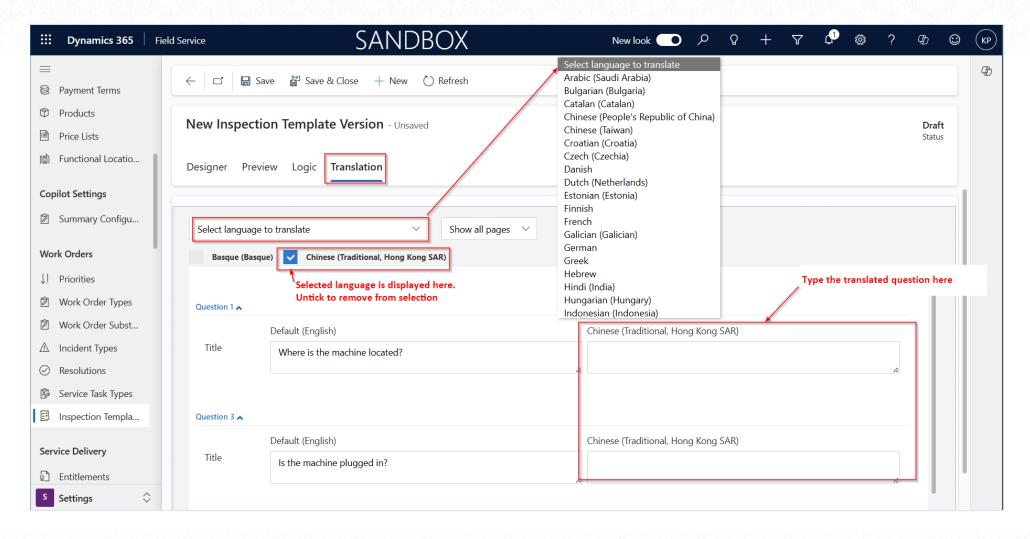


Additional rules can be set up in the template through the Logic tab.



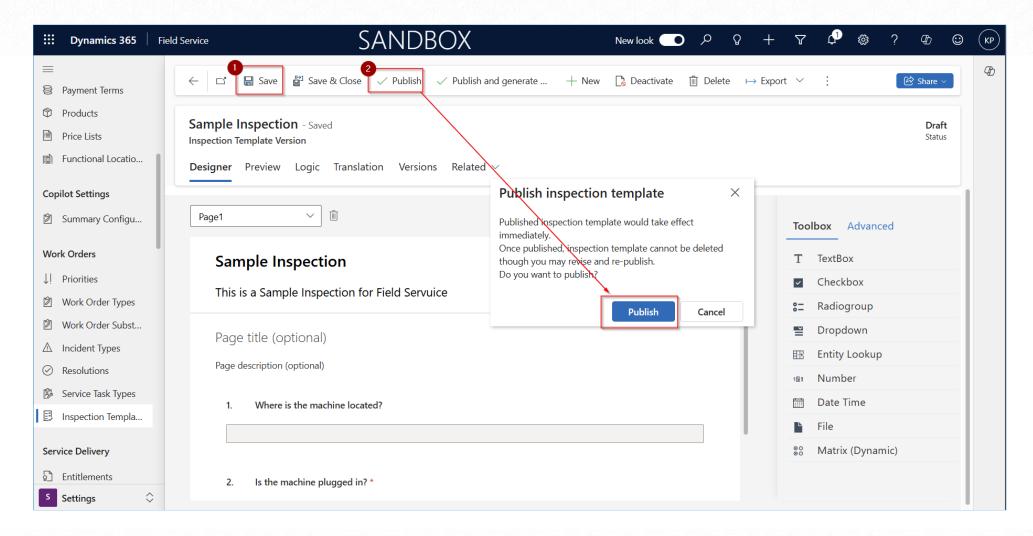


Go to Translation tab to retype the checklist questions in another language.



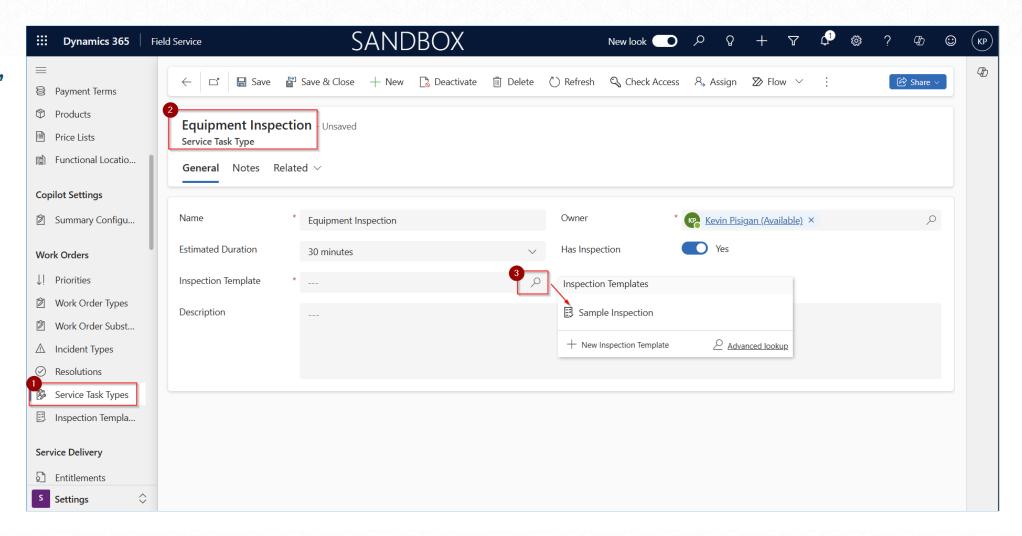


Click Save then Publish.





Once the template has been published, it can be linked to Service Tasks designated as inspections.

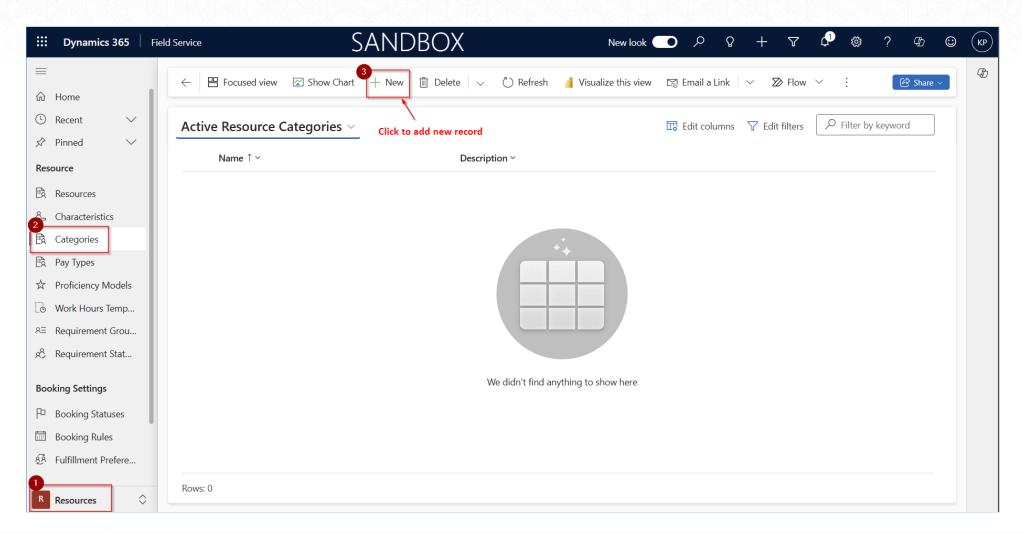


Setup and Configuration – Resource Categories



Categories store records of roles designated to people or physical assets. These can be assigned to resources and will be used as filtering criteria for work order assignments:

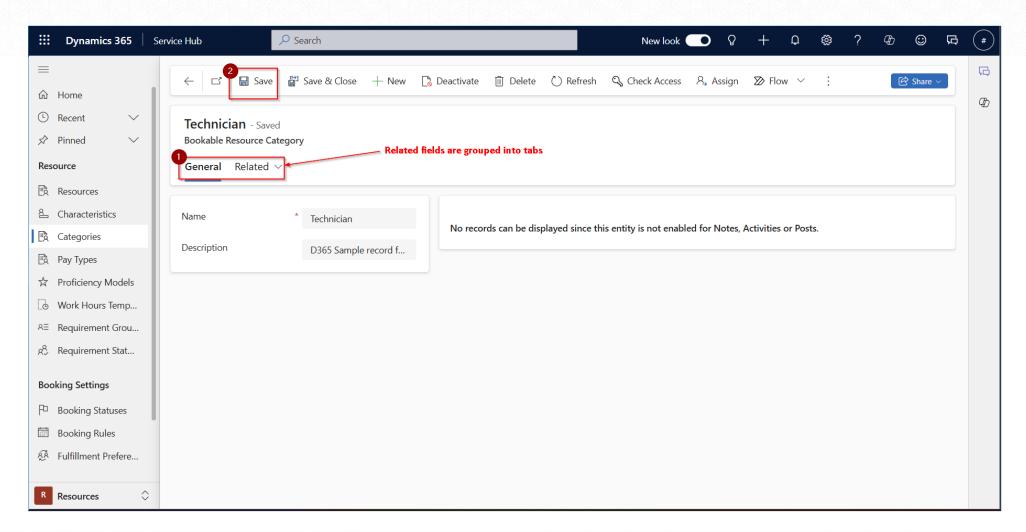
- Go to Resources
 Resource ->
 Categories.
- 2. Click + New.



Setup and Configuration – Resource Categories



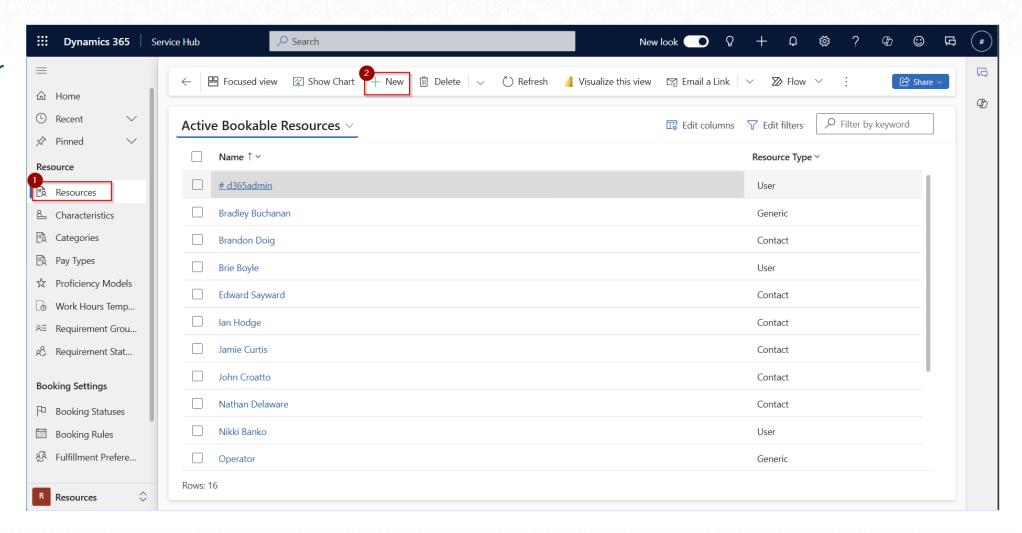
3. Enter the name of the resource category and click Save.





Resources store records of people or physical assets that are assigned/utilized to fulfill work orders.

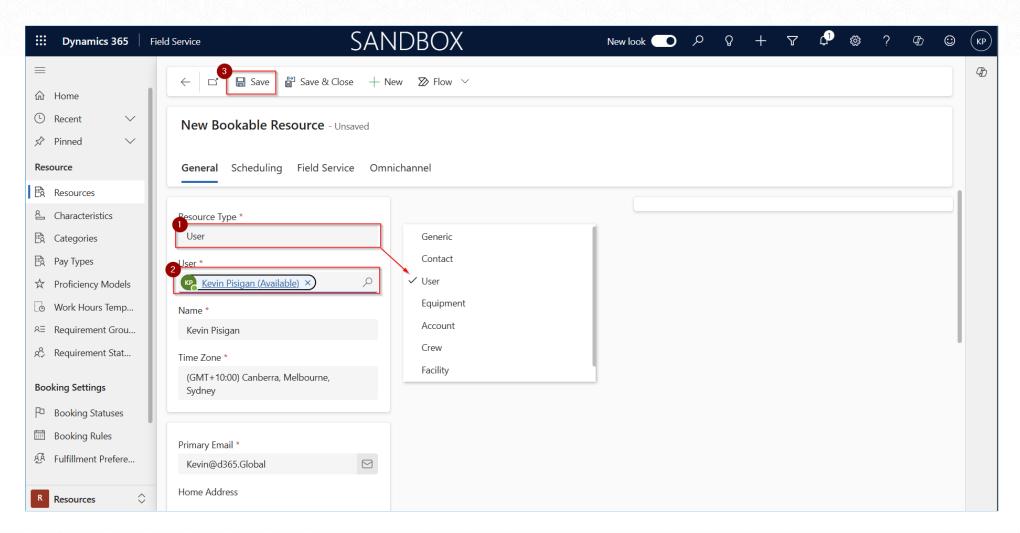
Go to Resources change area -> Resource -> Resources. Click + New.





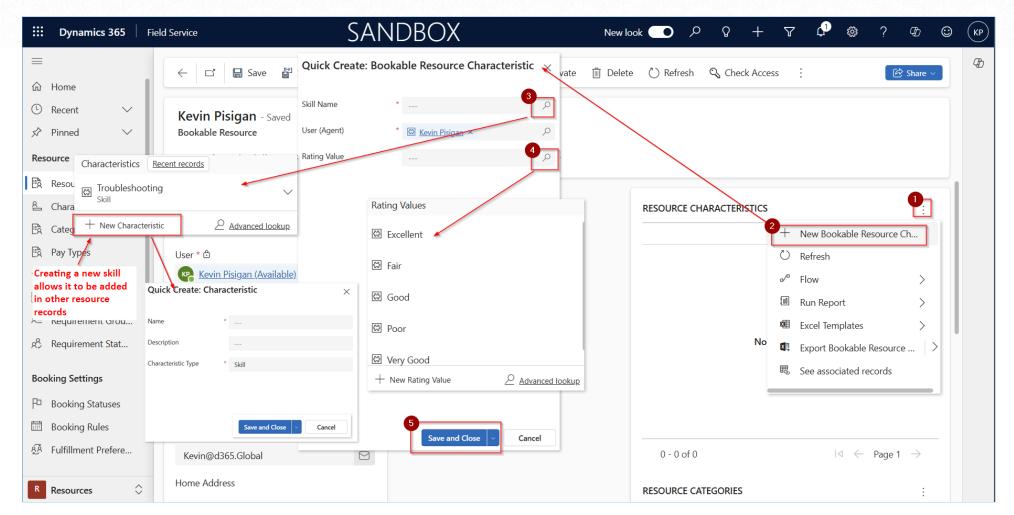
To create a new resource:

- 1. Choose the resource type. Typical options are User(must have a licensed Dynamics 365 account), Contact (must have a contact record in CRM), or Equipment (must have an equipment record in CRM).
- Enter the associated record based on the chosen option and click Save.



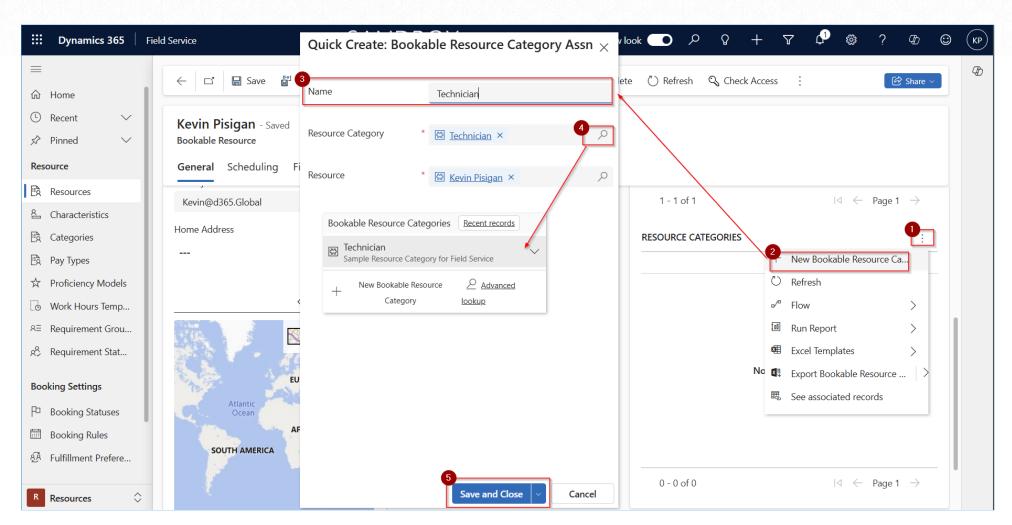


3. [OPTIONAL]
Characteristics
may be assigned
to resource. It will
be used as filtering
criteria for work
order assignments.



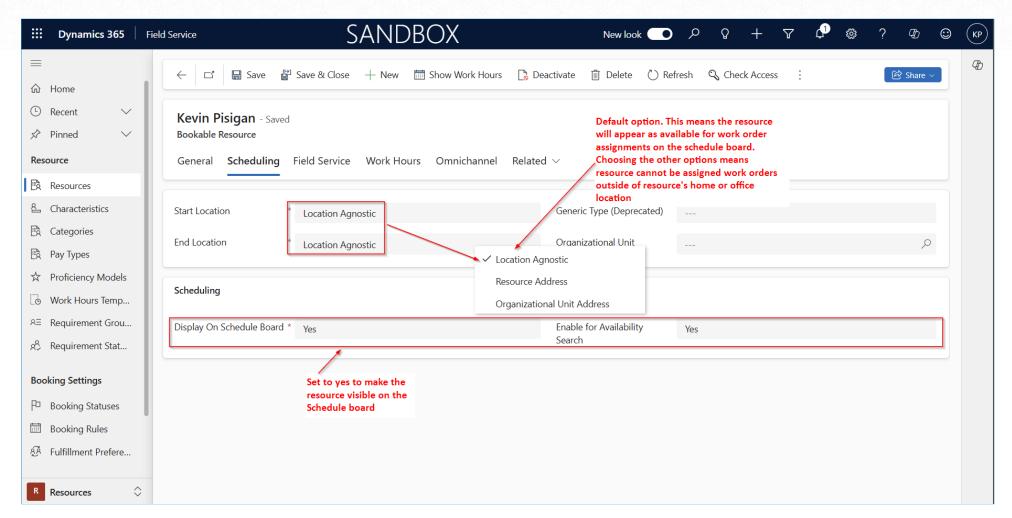


4. [OPTIONAL]
Categories/Roles
may be assigned
to a resource. It
will be used as
filtering criteria for
work order
assignments.



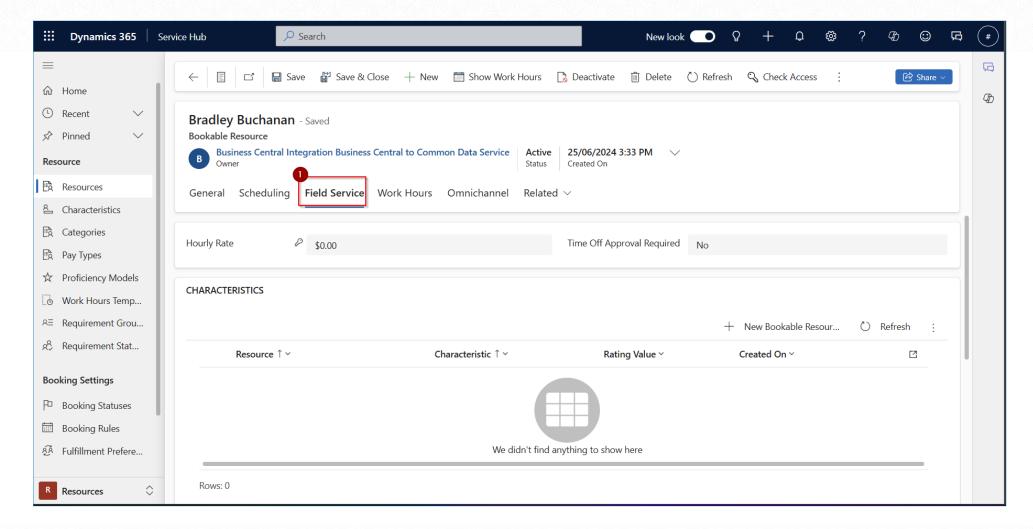


5. Click Scheduling to configure additional settings.



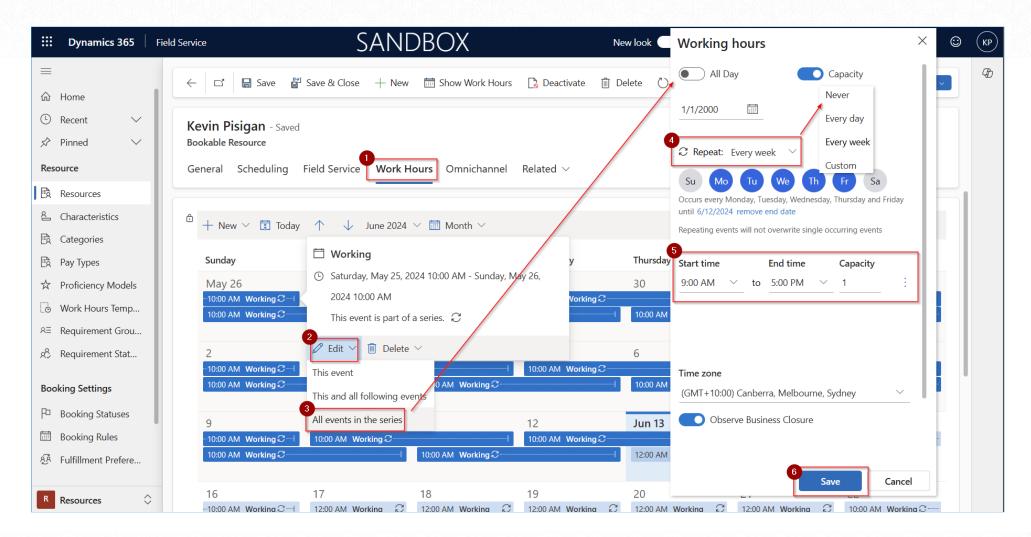


Click Field Service to see hourly rate and other related details.





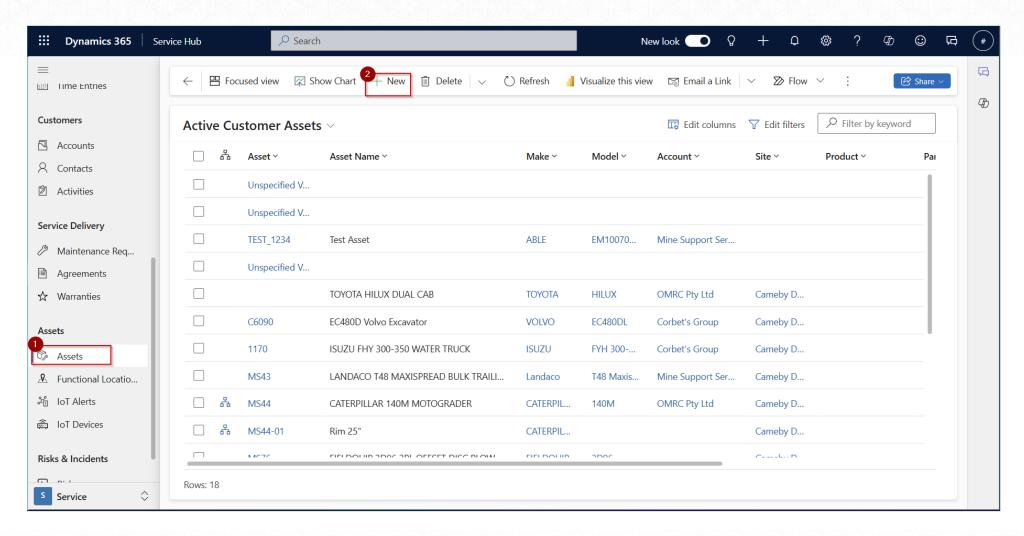
7. Go to Work Hours tab to set the resource's availability.





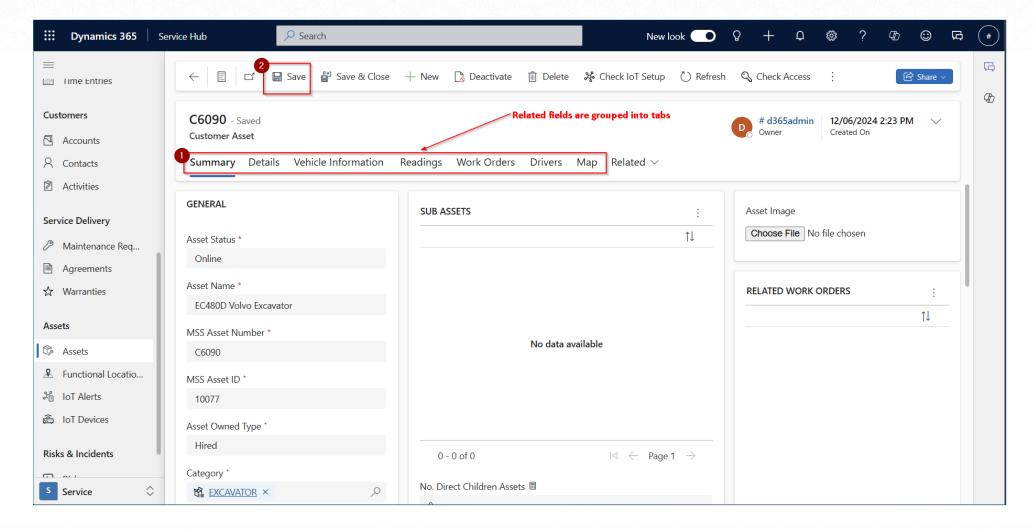
Assets represent physical equipment located at customer's premises. Resources are typically assigned work orders to service these assets:

- Go to Service -> Assets -> Assets.
- 2. Click + New.



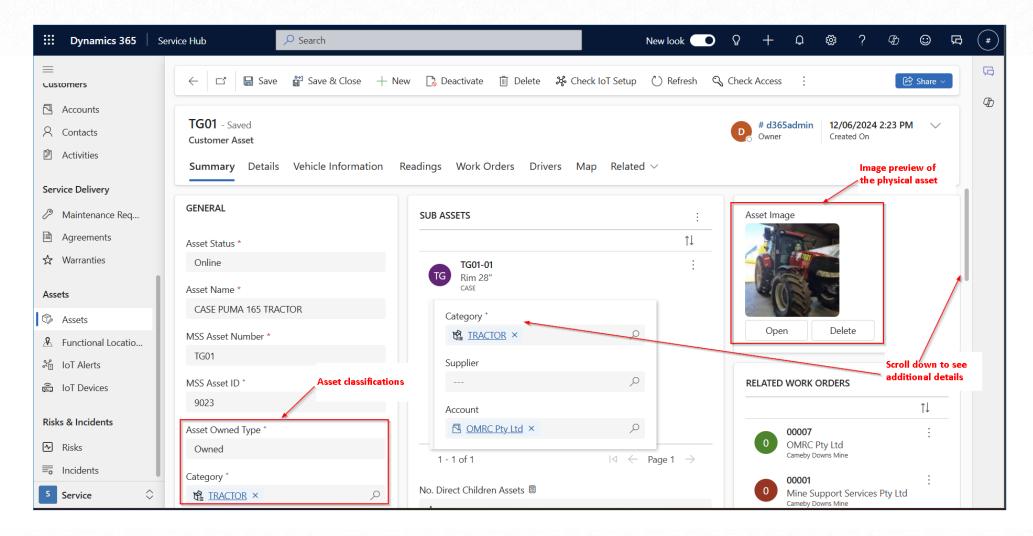


3. Enter the Asset details and click Save.





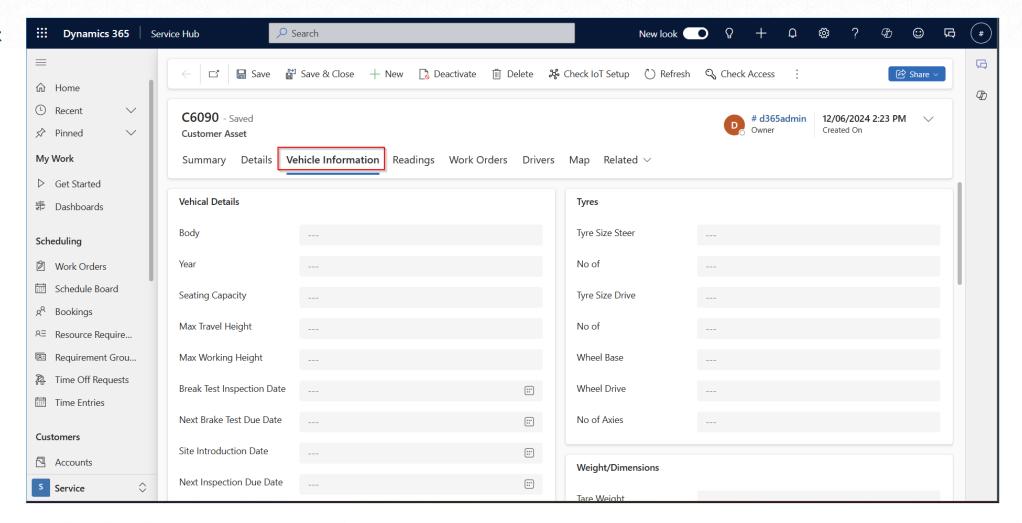
4. Summary tab displays key asset details. Refer to attached screenshot.





5. Based on the asset type, required form fields may vary.

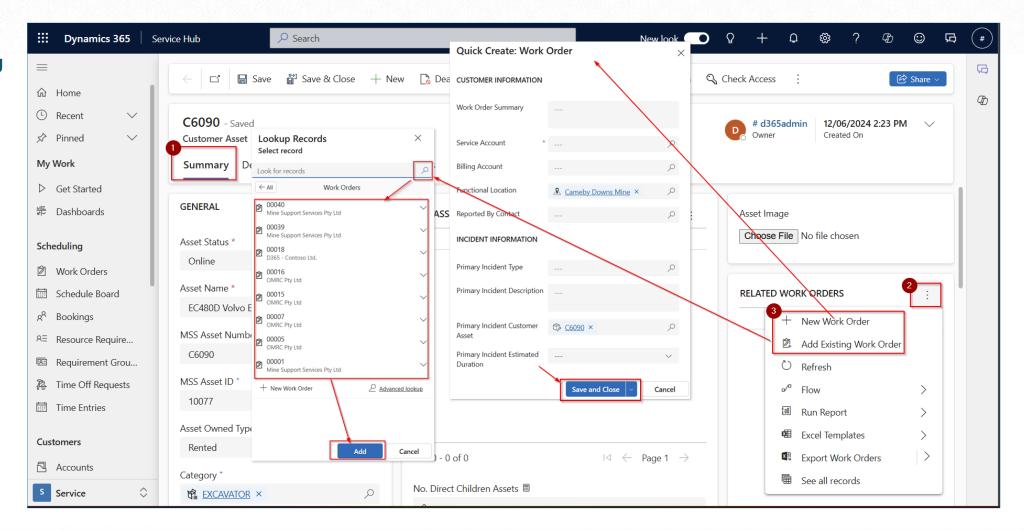
For example, if the asset's category is a vehicle, the tab Vehicle Information is displayed. It is hidden for nonvehicle assets as it is not applicable.





6. In the Summary tab, a new/existing work order can be linked to an Asset. Go to Related Work Orders and select the applicable option.

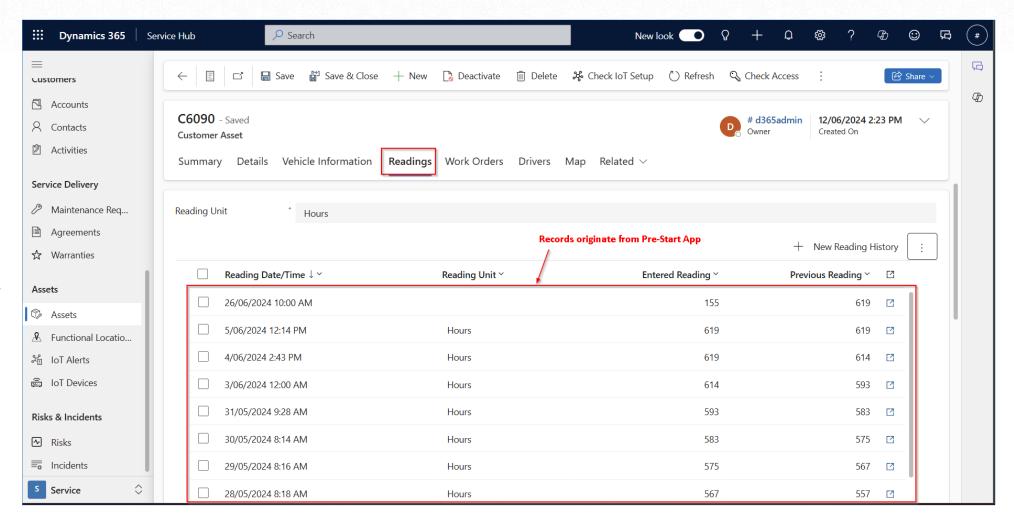
When an asset approaches its Service Due Date, system automatically generates a workflow for preventive maintenance.





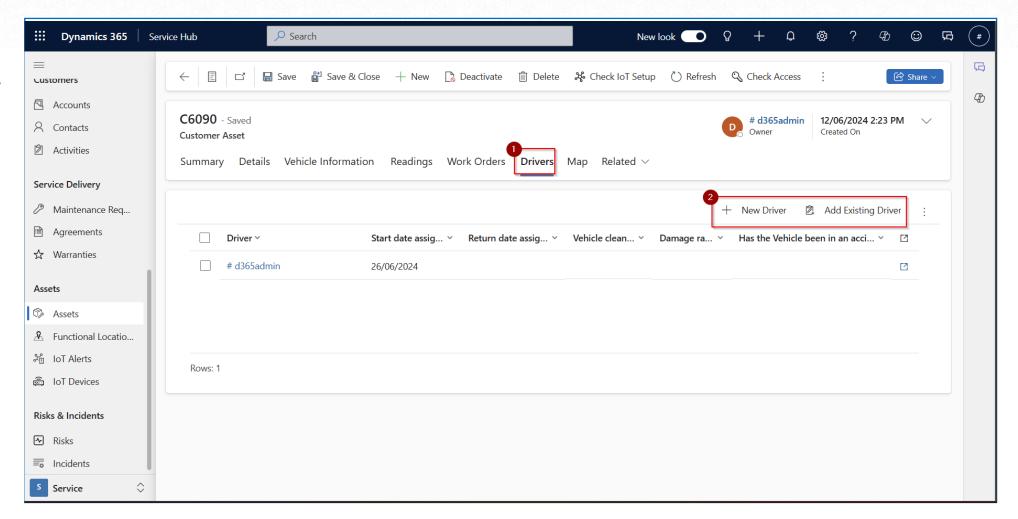
7. The Readings tab displays asset readings sent from the Pre-Start App.

Prestart app sends asset information such as description, fault type operating condition, functional location, pictures of damage and priority levels (e.g., 1 needs to be fixed in 24hrs).



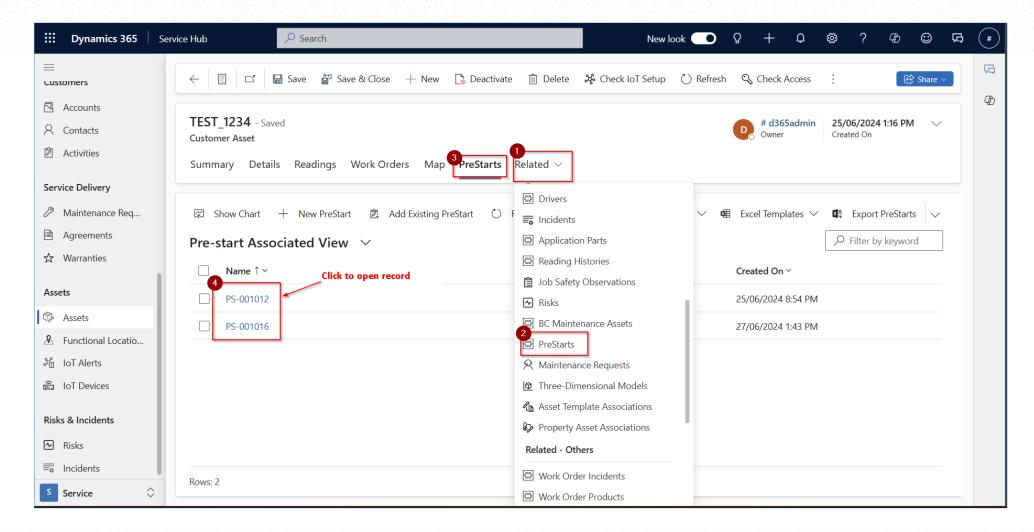


8. The Drivers tab displays resources assigned as drivers to a Vehicle asset record. These can be entered manually or sent from the Pre-Start App.



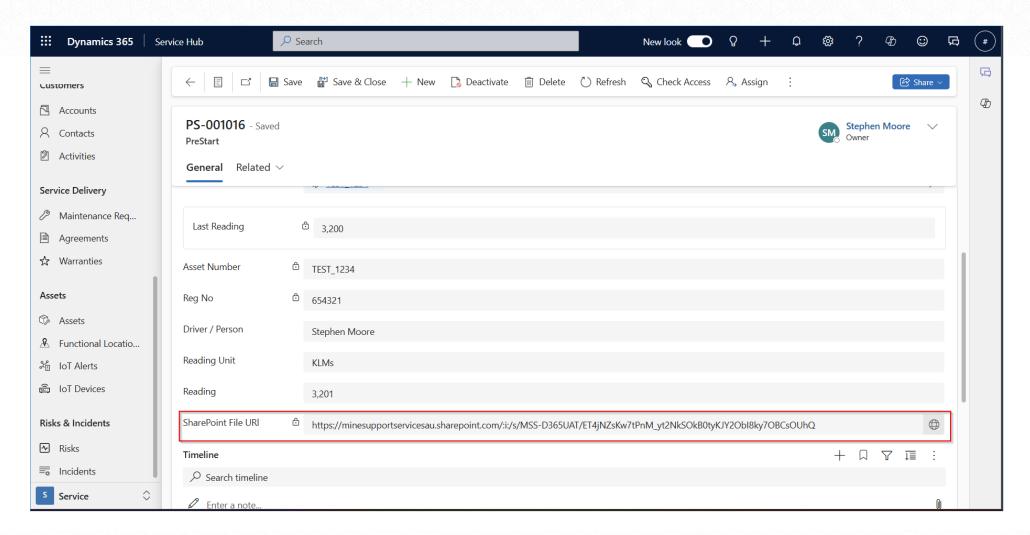


Go to Related ->
 PreStarts. This shows all daily prestarts conducted on the asset.





10. Form shows the SharePoint link to the image file showing the prestart procedure.

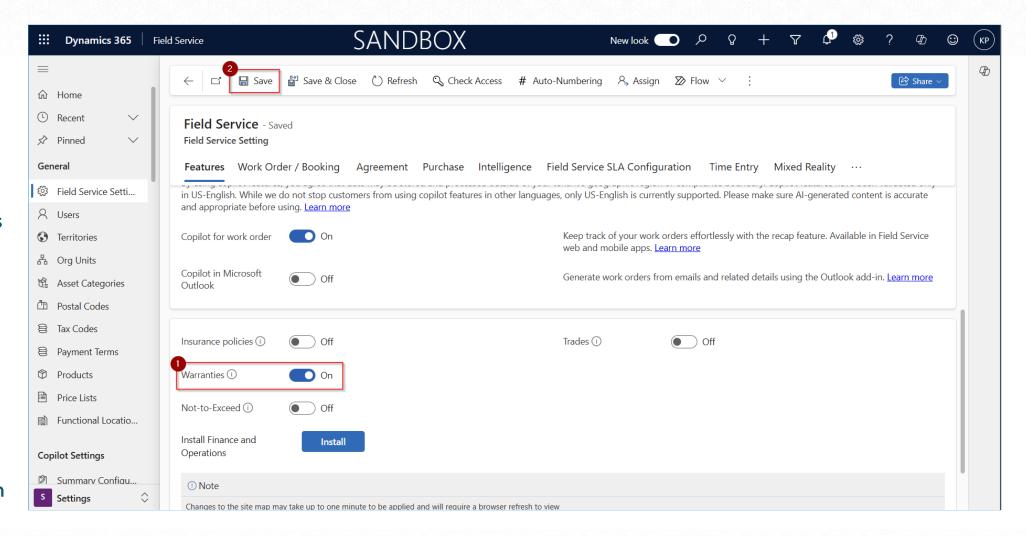


Warranties



A warranty is a guarantee to repair or replace an asset if it develops a failure within a specified period, or to do some work again if the service is not satisfactory. Dynamics 365 Field Service lets you define warranties and map them to assets, locations, or accounts to cover multiple warranty scenarios of your organization or your customers.

It should FIRST be enabled as a feature in Settings.

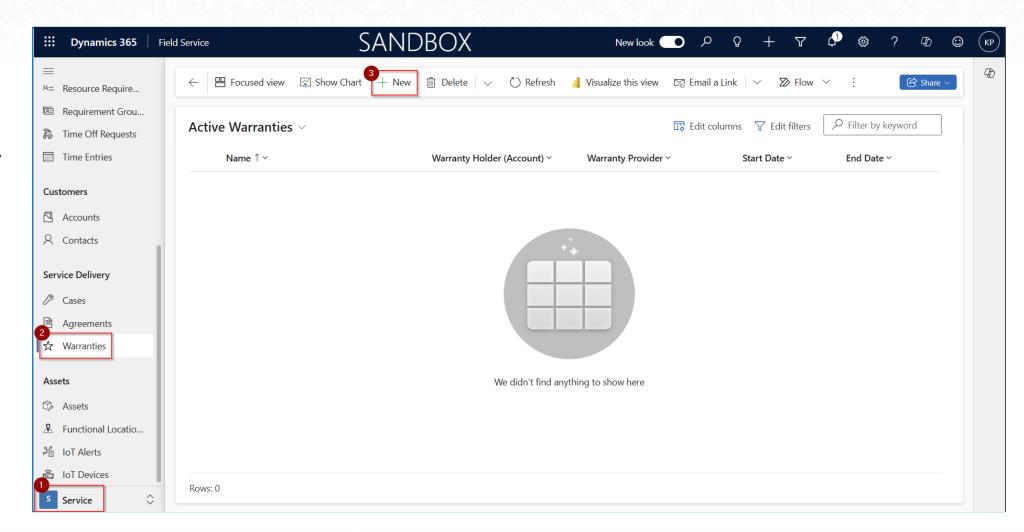


Warranties



To create a warranty record:

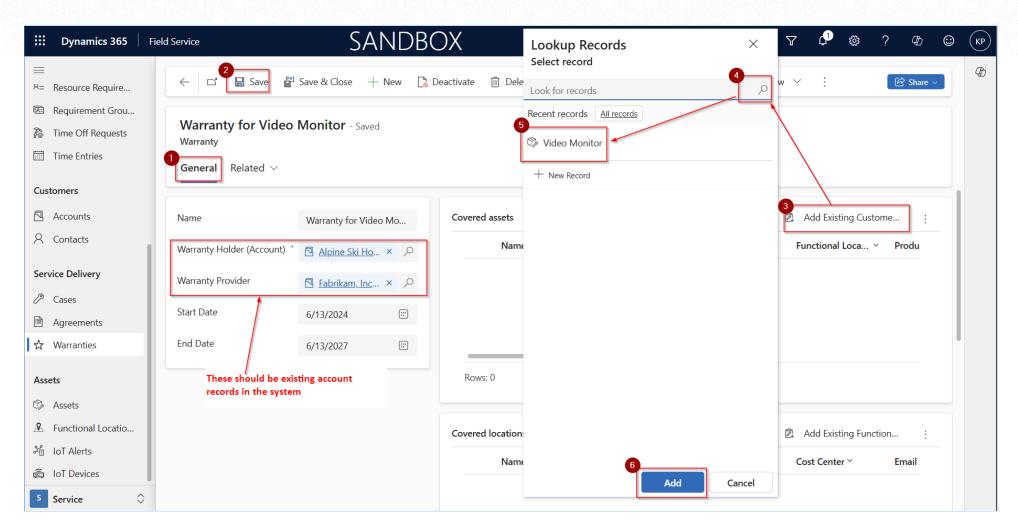
- Go to Service change area -> Service Delivery -> Warranties.
- 2. Click + New.



Warranties



3. Fill the details and click Save. Add the existing customer asset that will be covered by this warranty.

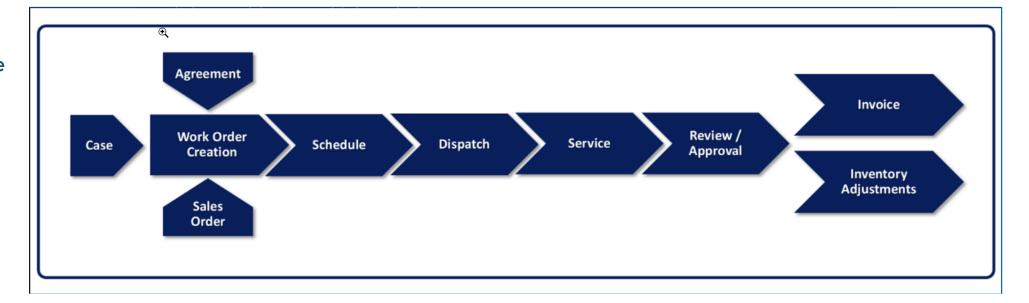




Work orders refer to a task or a job needing to be scheduled or assigned to someone. They generally include information such as who the work is for, the type of work to be performed, timeframes, products and services to be delivered, tasks that need to be done, and more.

Typically, a work order goes through six stages as shown in the screenshot.

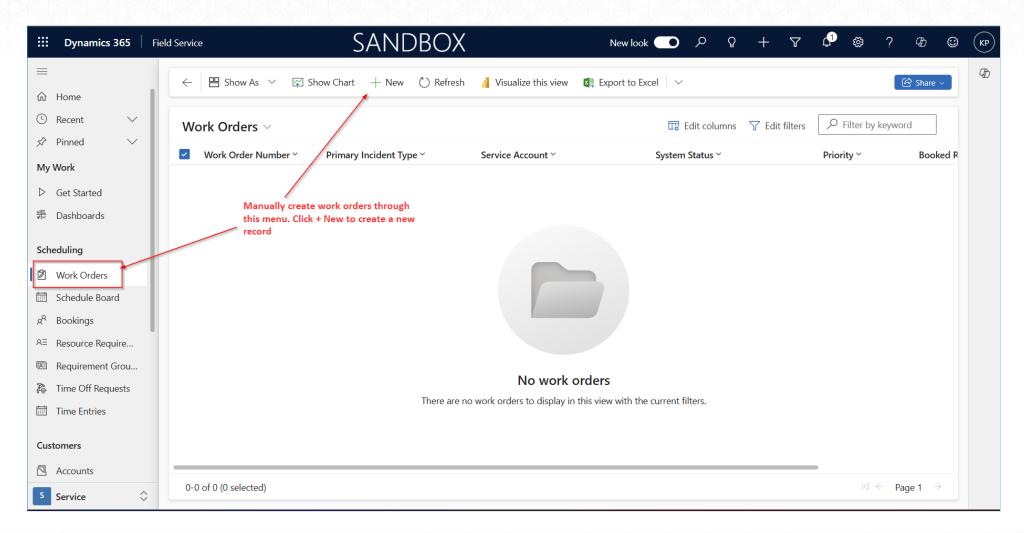
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Work orders can be created:

- As part of a defined service selling process.
- 2. As an escalation for a case that couldn't be resolved remotely.
- 3. By a customer manually requesting or scheduling service from a portal.
- 4. Automatically, based on a service agreement or schedule.

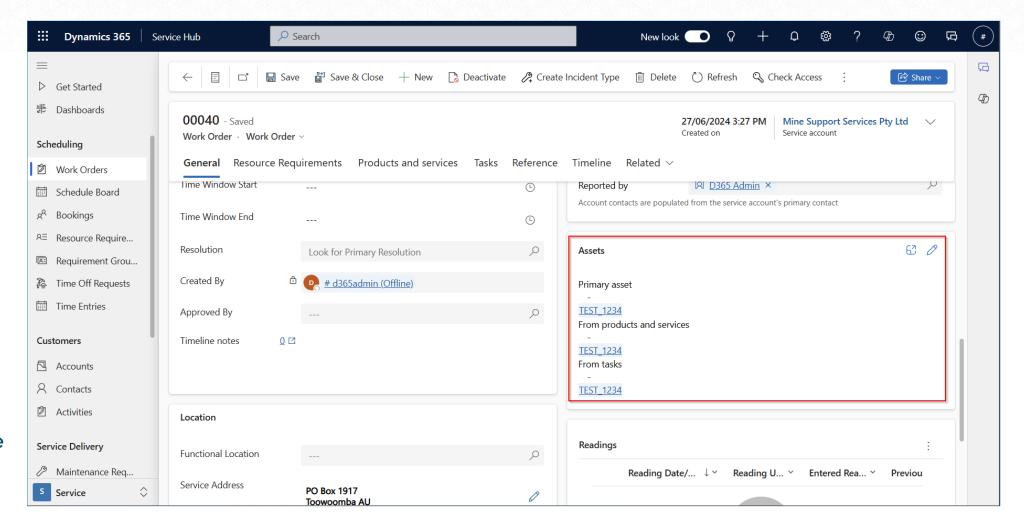




Assets can be linked to the work order for the technician to know which specific equipment on-site needs to be serviced for the affected customer.

Maintenance costs associated with the work order can only be charged to the parent asset. If a work order needs to be done against an Asset record that has a parent asset, the parent asset should be set on the primary asset field.

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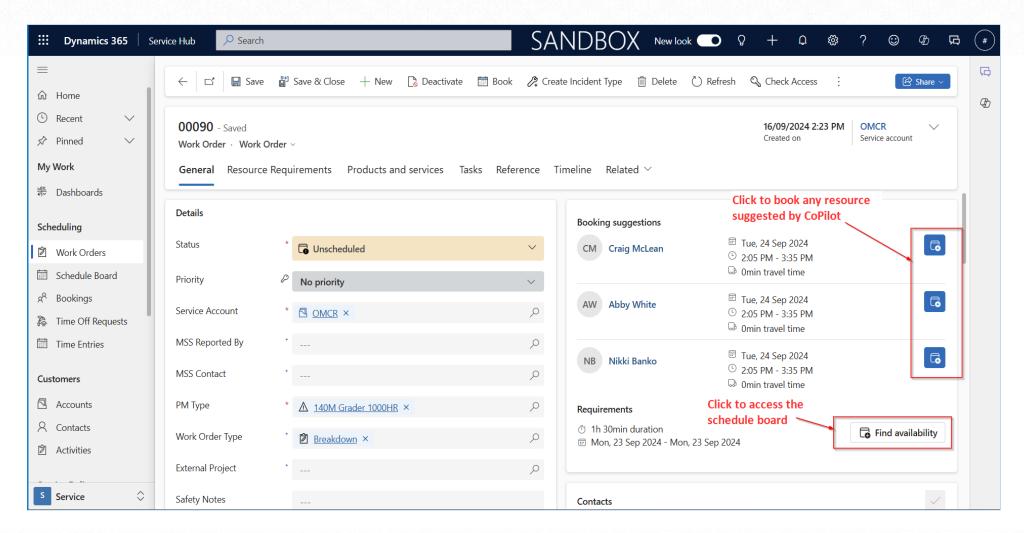




Resources (People, Equipment) can be booked and assigned to the work order.

CoPilot displays a list of Booking suggestions.

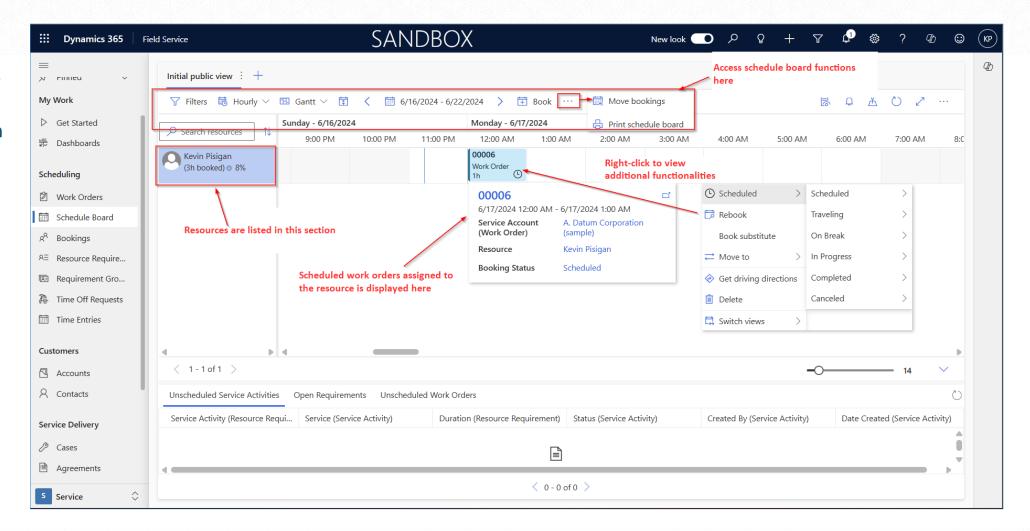
If another resource is preferred, click Find Availability to access the schedule board and manually book a resource.





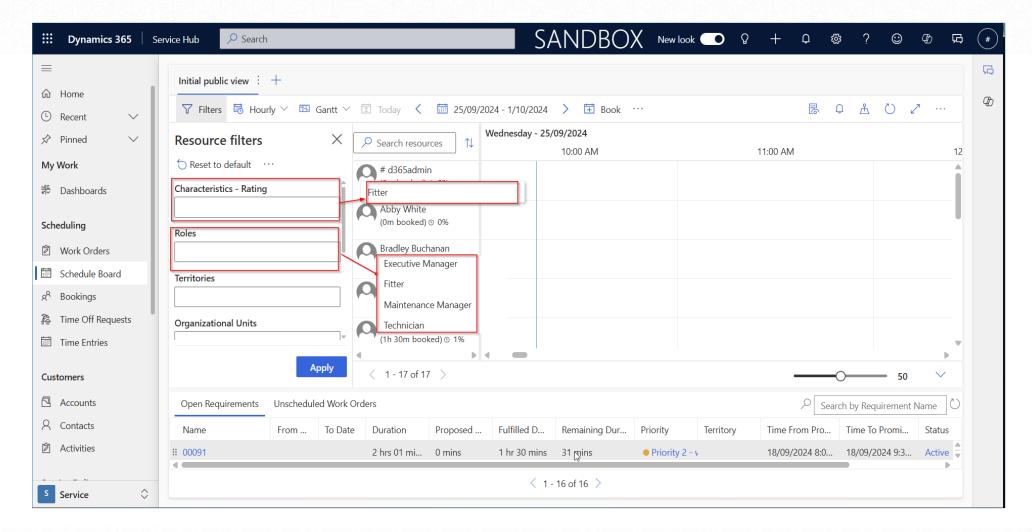
The schedule board plays an important role across all types of scheduling. It can be configured to meet an organization's scheduling requirements. For basic service scheduling, match a requirement to a resource in a particular time slot on the schedule board.

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



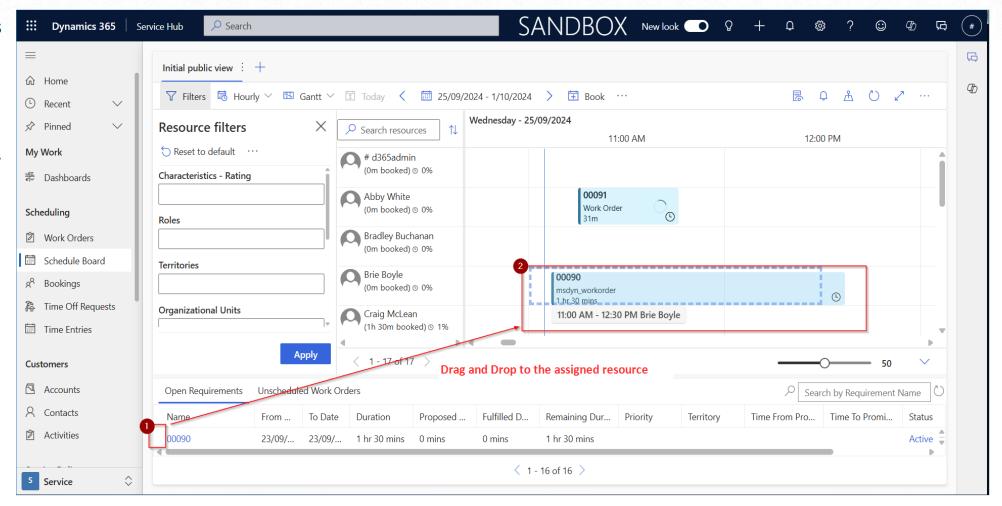


Available resources can be filtered based on Role or resource characteristics (skills).





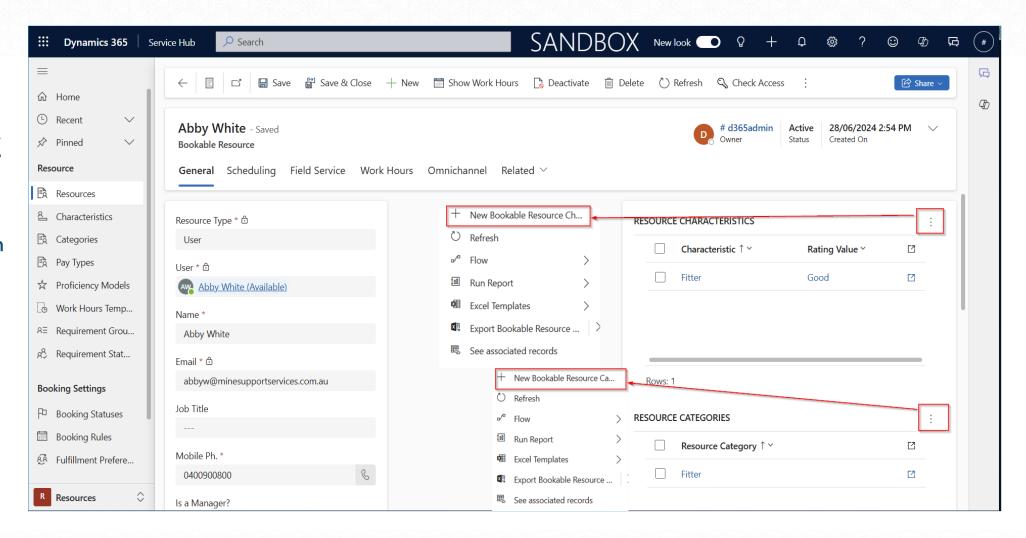
Resource Requirements (from all scheduled Work Orders) are listed on the bottom section of the Schedule Board. Each can be dragged and dropped on the any available resource on the Schedule Board to assign it.





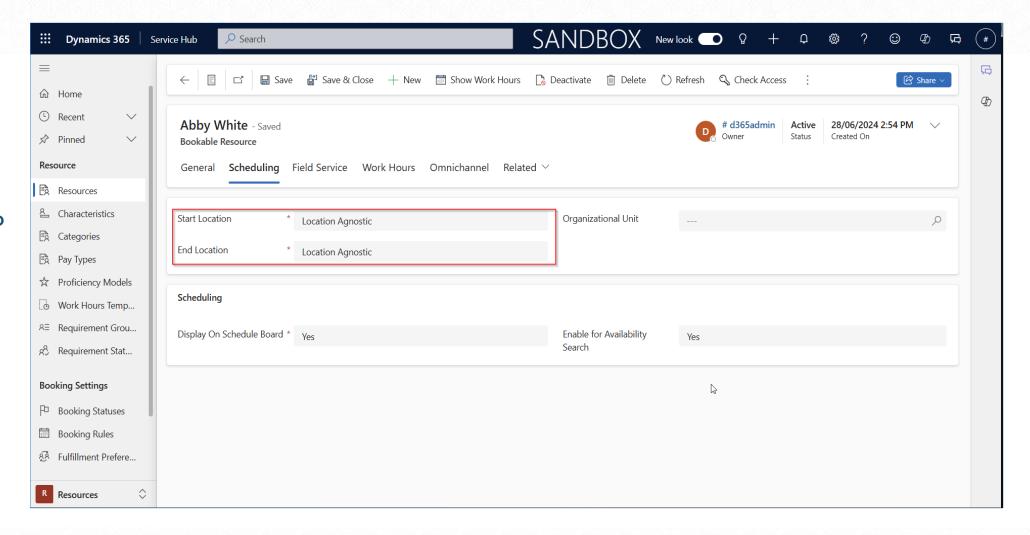
For the Role or Resource Characteristics filters to work, Resources should be properly set up with the applicable Roles/Characteristics.

In this example, this resource will display in the schedule board when the user types "Fitter" in the abovementioned filters.



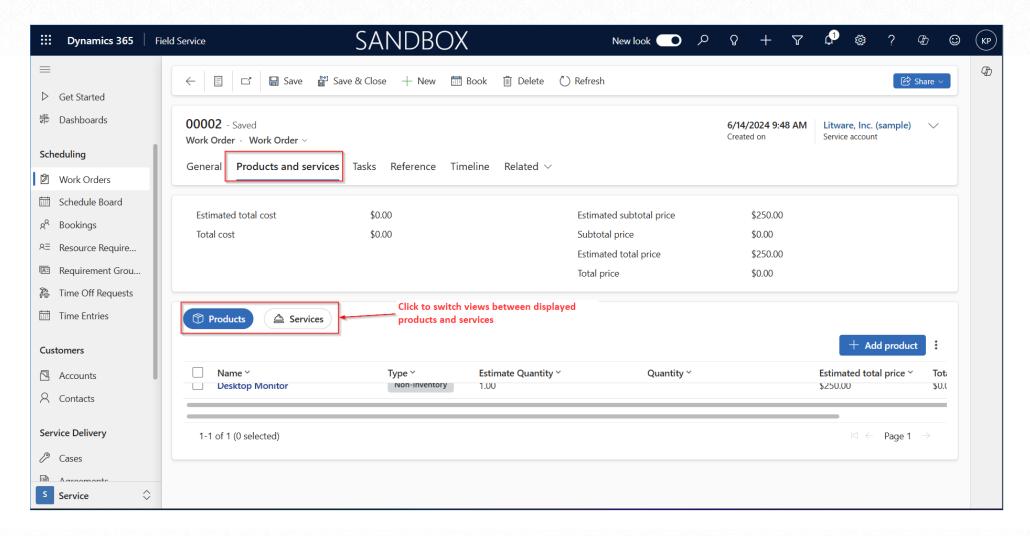


Under Scheduling,
Ensure that all
Resource's Start/End
Locations are set to
"Location Agnostic".
This prevents
Resources from not
displaying on the
schedule board due to
location issues.



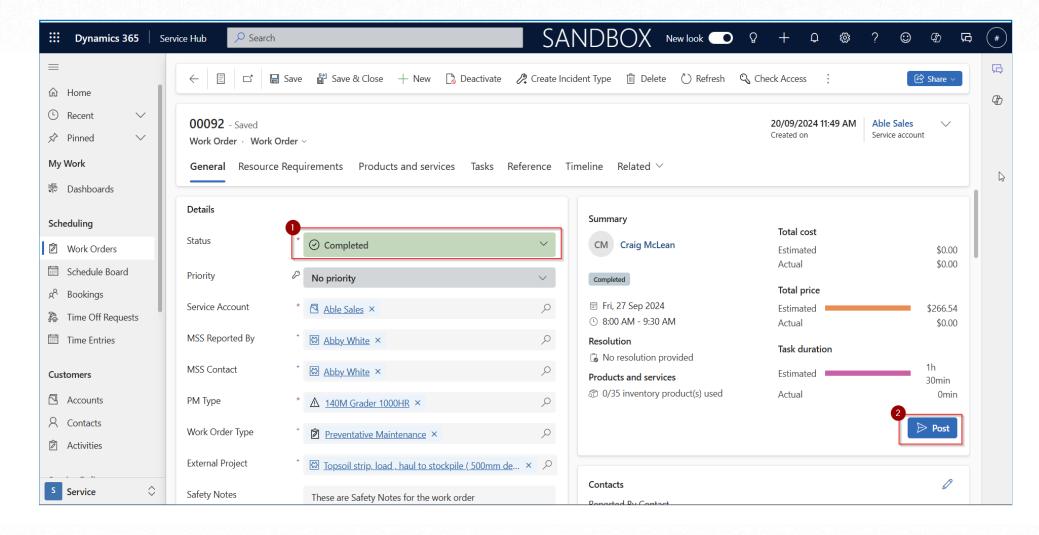


Go to Products and services tab to view the products to be provided and services to be rendered associated with the work order.



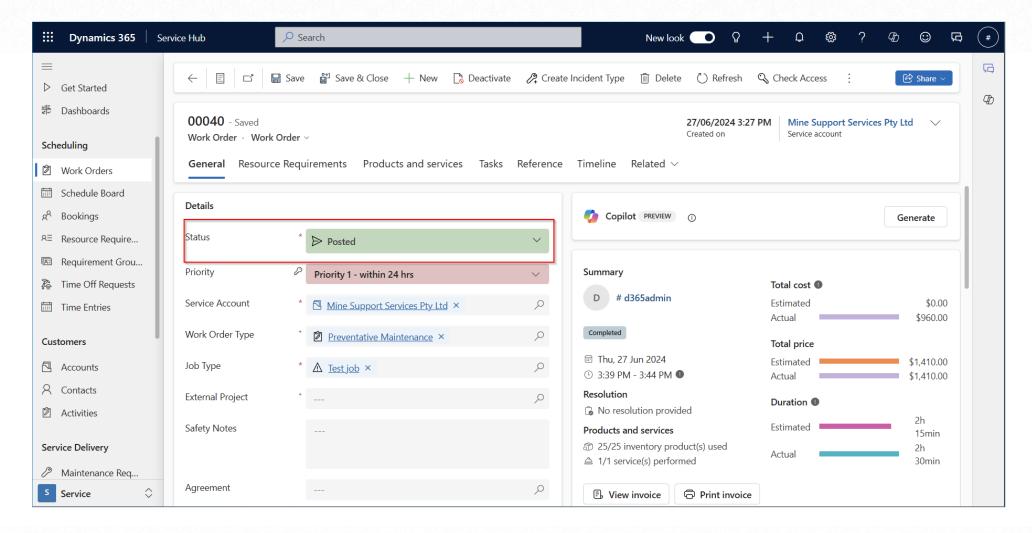


Once a work order Status is completed, Click Post to create the maintenance journal.





Once a work order
Status is posted,
system will create a
maintenance journal
and send it to
Business Central. The
journal amount is
added to the Fixed
Asset as a
maintenance charge.

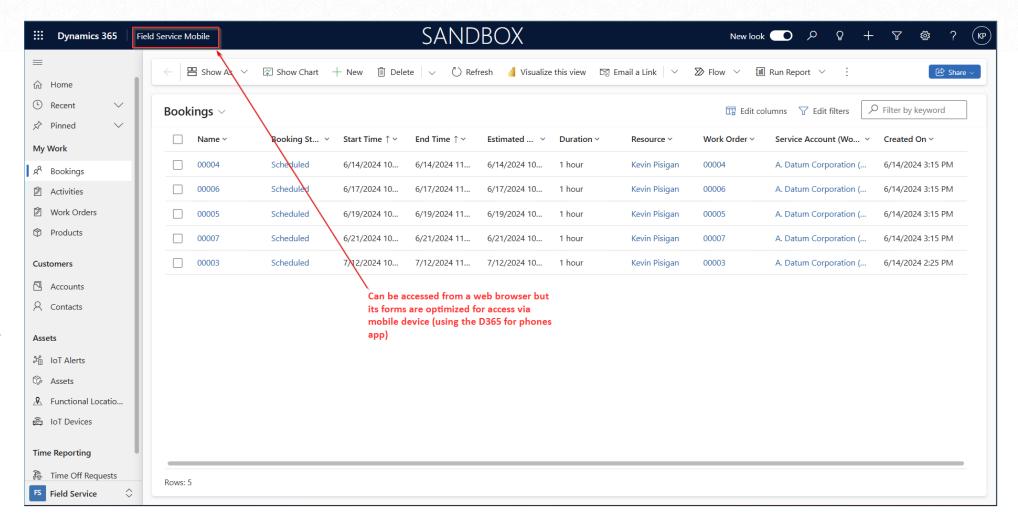


Using Field Service Mobile Application



The Field Service mobile app enables technicians to view and update work orders, customer assets, accounts, and more on the go. The app is available for Windows 10+, Apple iOS, and Google Android devices at no extra charge.

The mobile app is built on Microsoft Power Platform as a model-driven app, which makes it customizable to your business needs. It's included in your Field Service license.

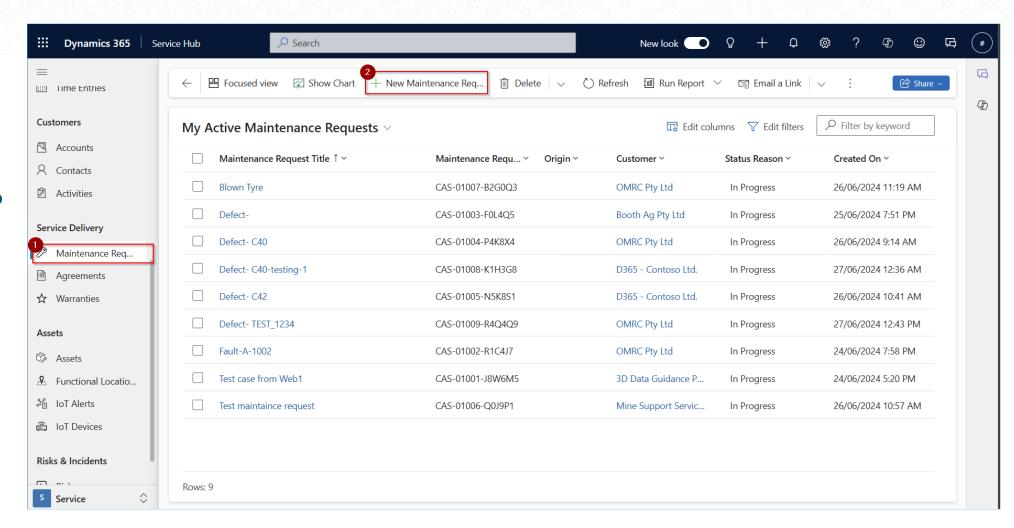


Maintenance Requests



This menu lists
records of customer
requests for
preventive
maintenance / repair
of onsite equipment.
They can be raised
from the Pre-start App
or can be entered
manually using the
steps below:

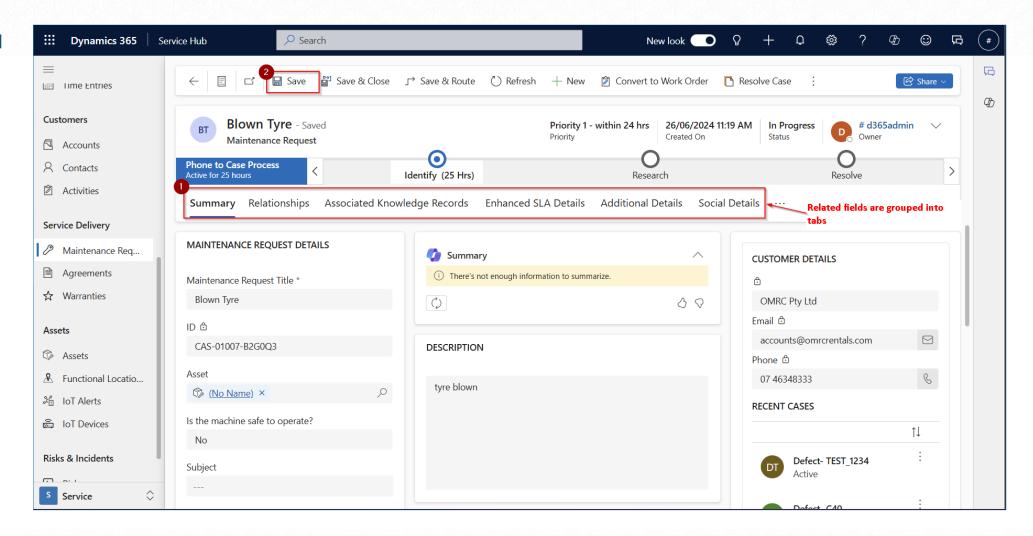
- 1. Go to Service ->
 Service Delivery ->
 Maintenance
 Requests.
- Click + New Maintenance Request.



Maintenance Requests



3. Fill in the required details then click Save.

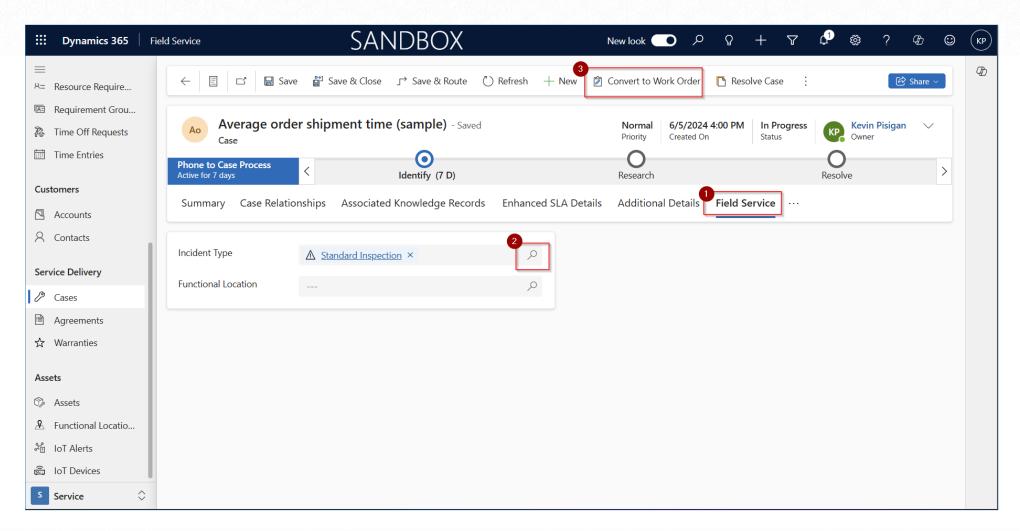


Work Orders - Converting from a Maintenance Request



A Work Order can also be created from a Maintenance Request.

From a Maintenance Request record, go to Field Service, specify the Incident Type, then click Convert to Work Order.

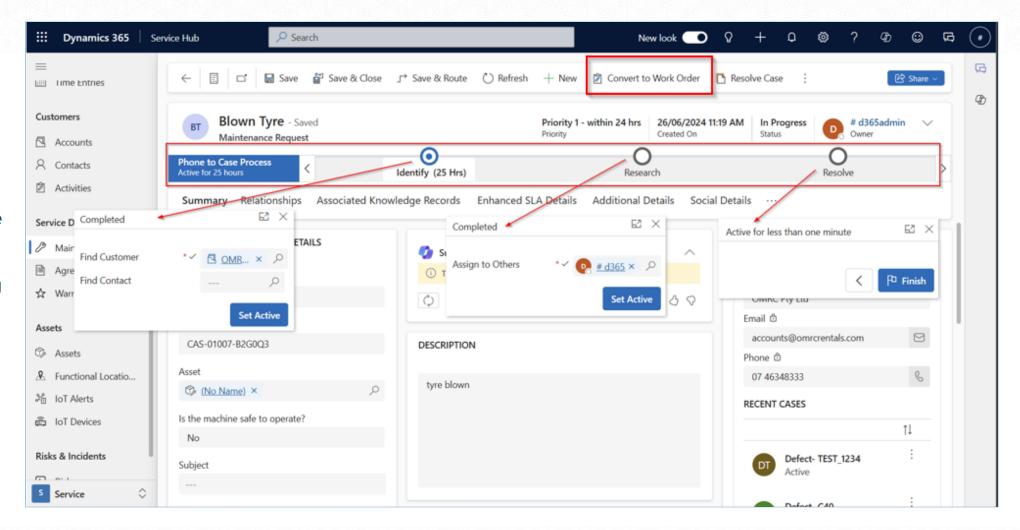


Maintenance Requests



4. Use the business process flow to manage maintenance request from request to resolution.

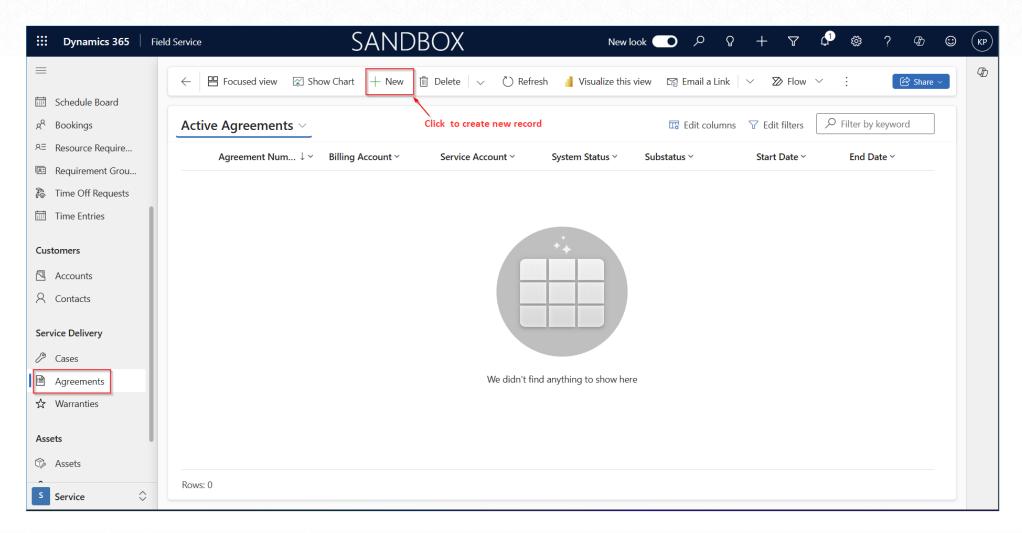
Work Order can be created from a maintenance request by clicking Convert to Work Order.





Agreements provide
the ability to
autogenerate work
orders on a defined
schedule. They're
commonly used when
organizations have
maintenance
agreements for
specific pieces of
equipment:

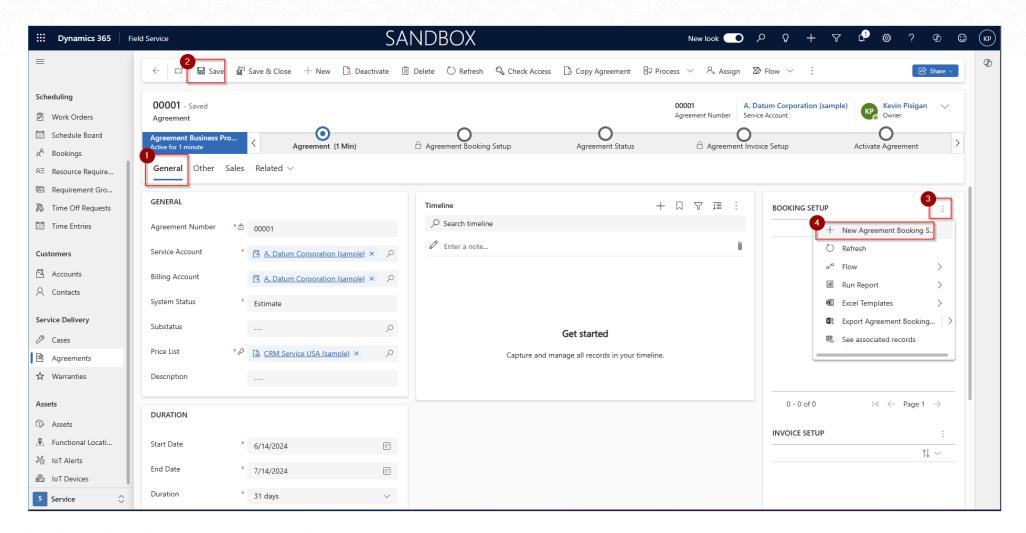
1. Under Service change area, click Agreements then click + New.



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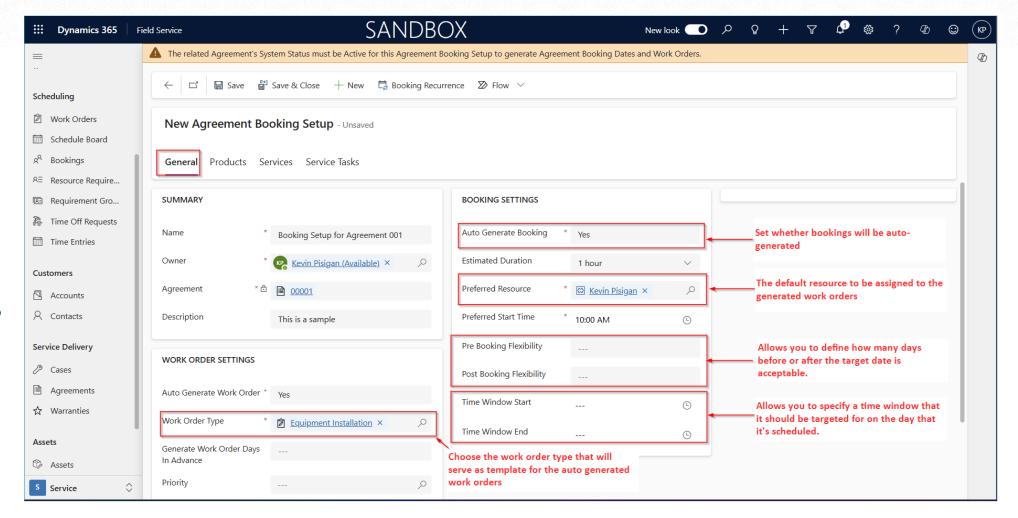
- 2. Fill in the required details, then click Save.
- 3. Go to Booking Setup, click the 3 dots and choose + New Agreement Booking Setup.





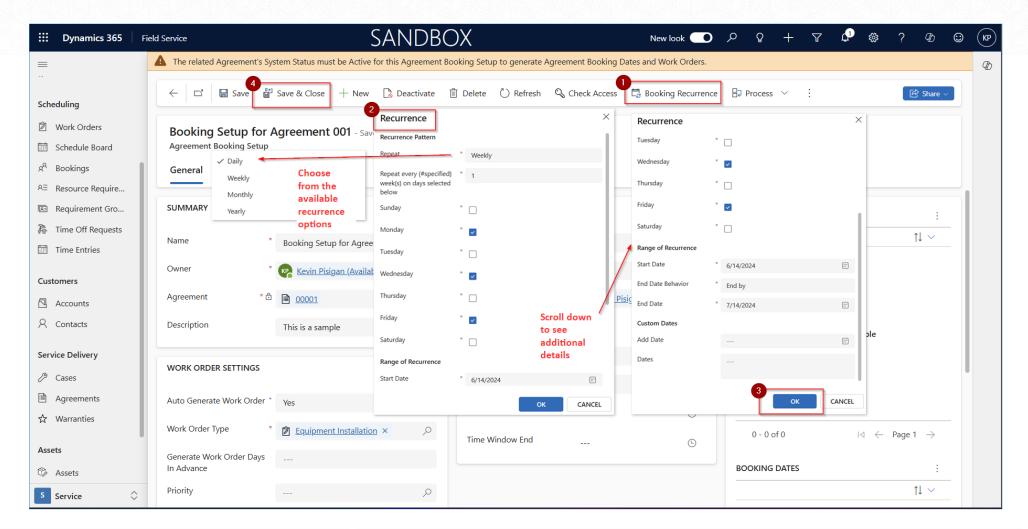
4. Fill in the required fields then click Save.

Automatically generating bookings works well when a customer would prefer a specific resource at relatively the same time. For that reason, if you choose to auto create the booking, you'll need to specify a preferred resource and start time. The system will create a booking for that resource as close to the preferred start time as possible. If you won't be scheduling the same resource for each item. you should select not to auto generate the booking; instead, you should have a dispatcher schedule it manually or use a resource scheduling optimization.



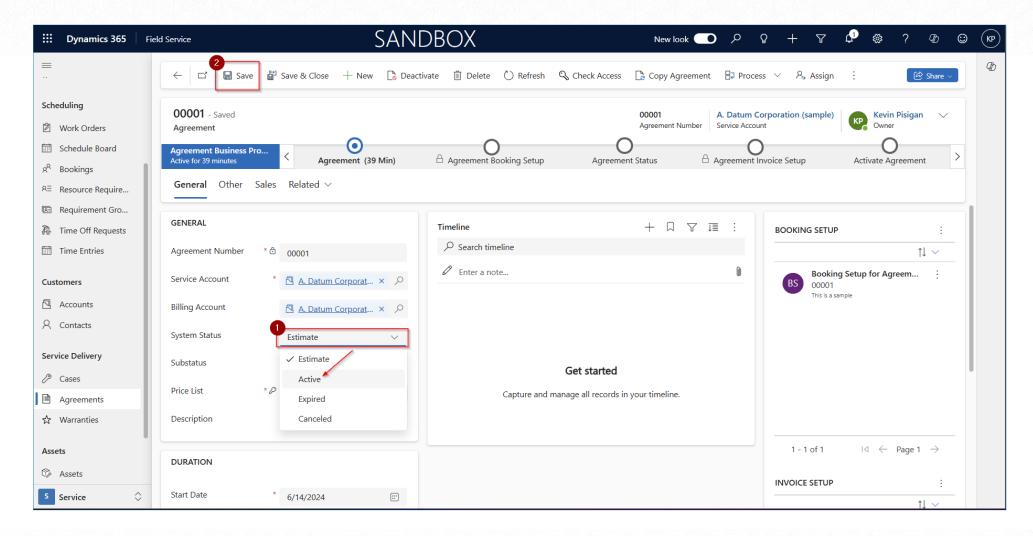


5. Click Booking
Recurrence to set
the generation
dates for the work
orders. Click OK
then click Save &
Close to exit the
agreement
booking setup.



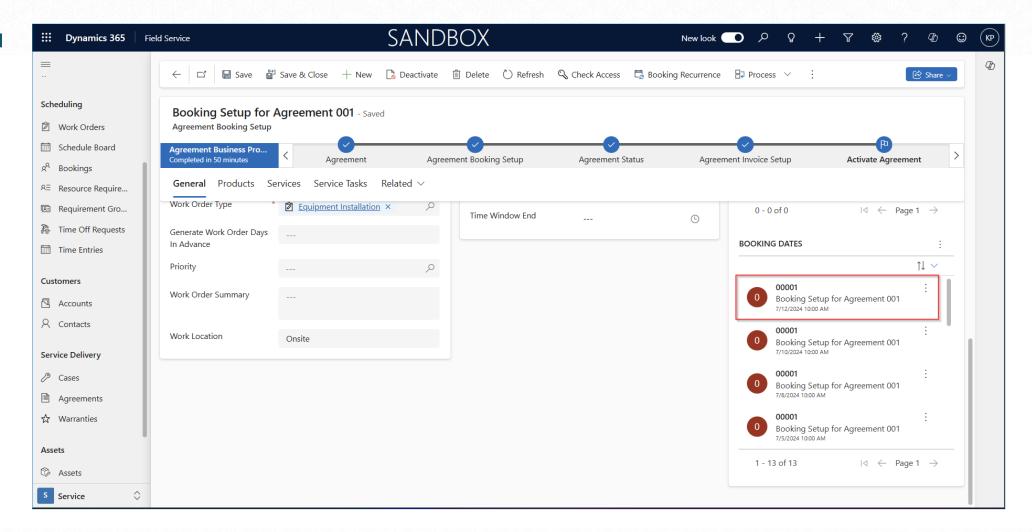


6. Activate the agreement by changing the System Status to Active. Click Save.



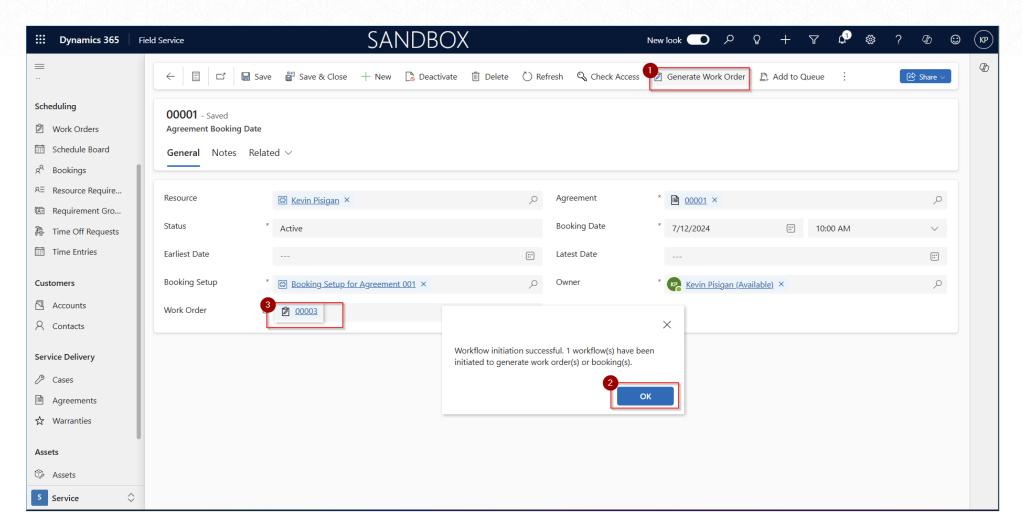


7. Booking dates will be generated.
Open a booking date to view its details.





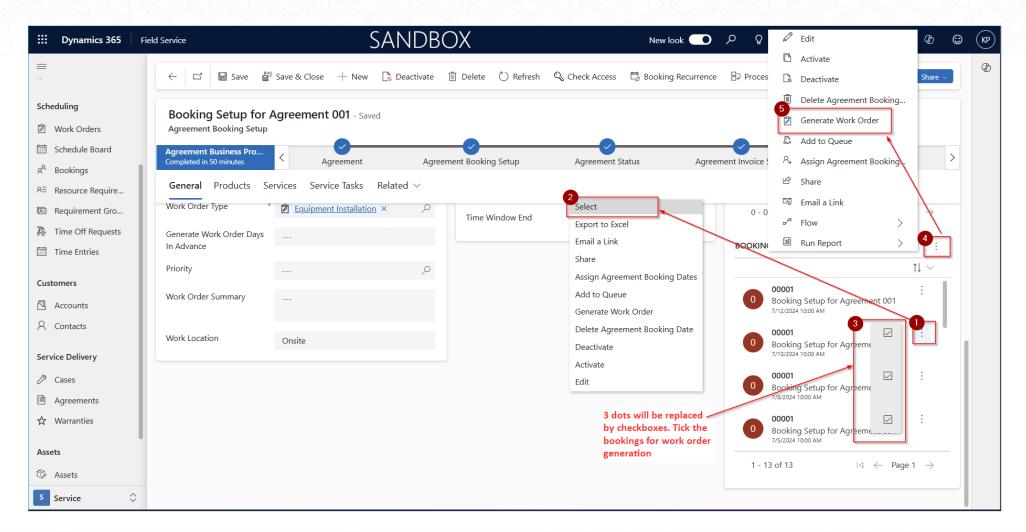
8. Click Generate
Work Order. After
some time, the
work order field
will be populated
with the work
order record.





9. [OPTIONAL]

Multiple bookings
can be generated
with work orders.
Refer to attached
screenshot for the
steps.

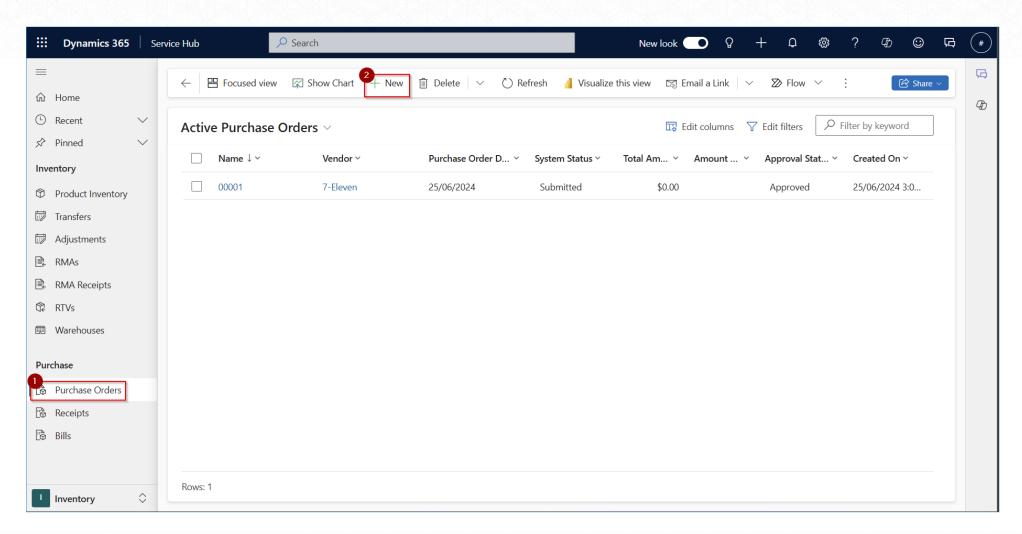




A purchase order (PO) is created to add inventory to a warehouse, or to purchase products to sell to a customer in a work order.

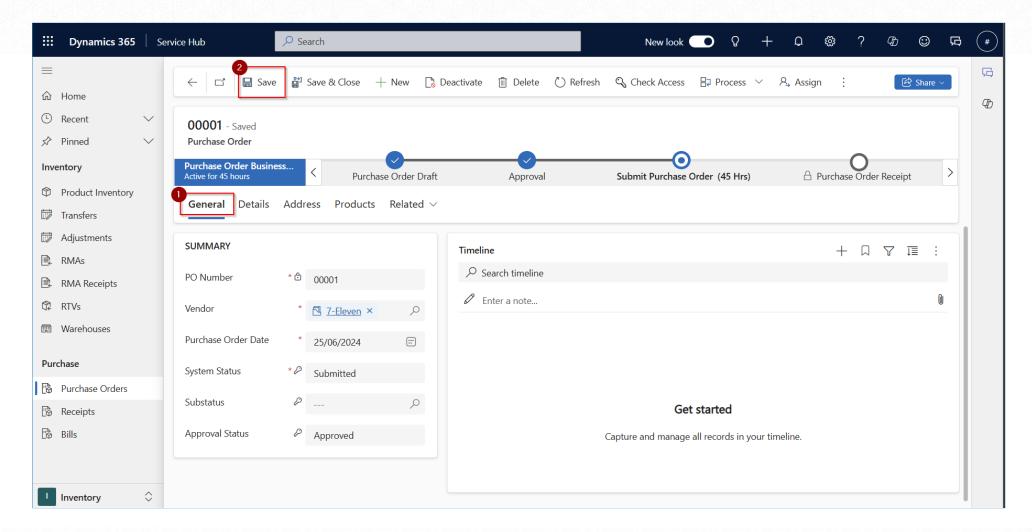
To create a purchase order:

- Go to Inventory ->
 Purchase ->
 Purchase Orders.
- 2. Click + New.



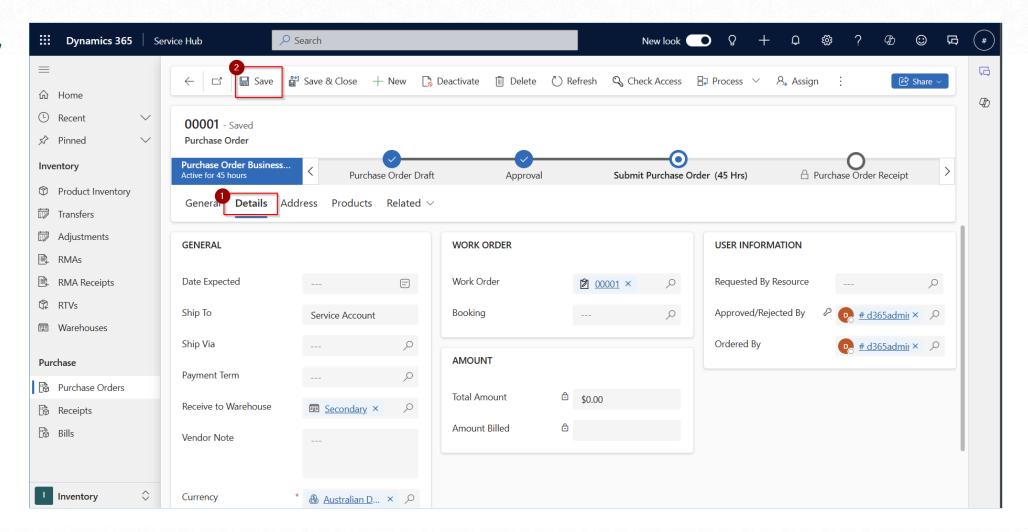


3. On the General tab, enter the Vendor and other details (should be an existing account record). Click Save.



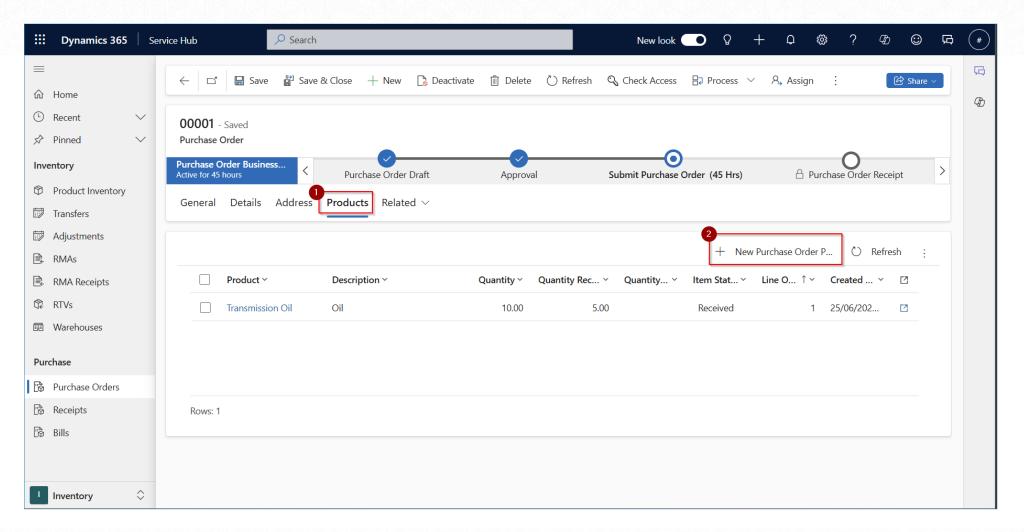


4. On the Details tab, enter additional information, such as related work order, shipping details, etc. Click Save.



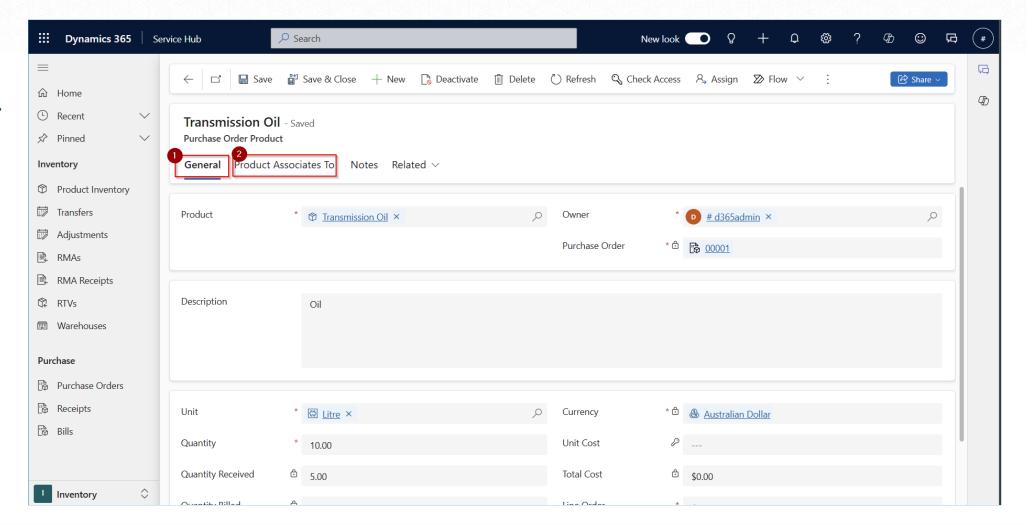


5. Go to Products and add the product items to be purchased. Click + New Purchase Order Product.



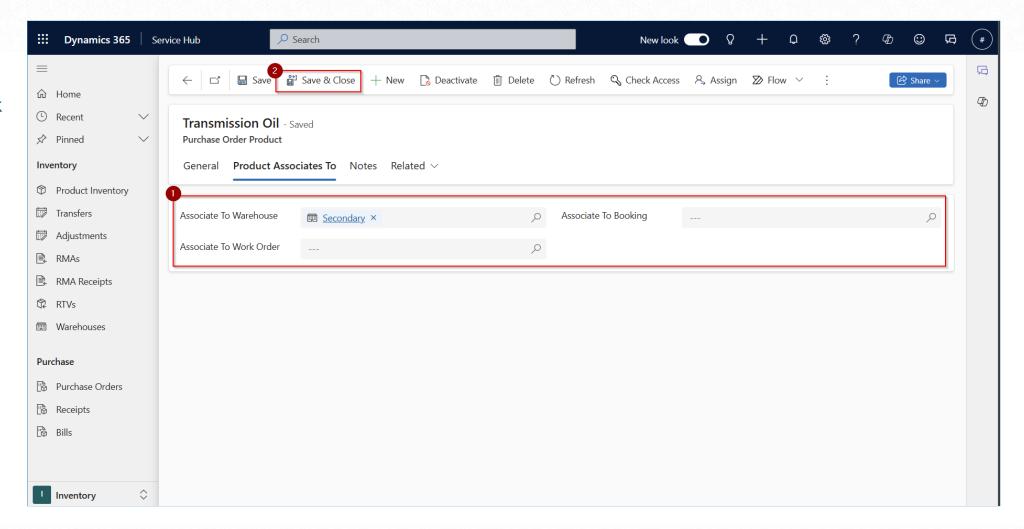


6. Fill in the product details. Go to the "Product Associates To" tab.



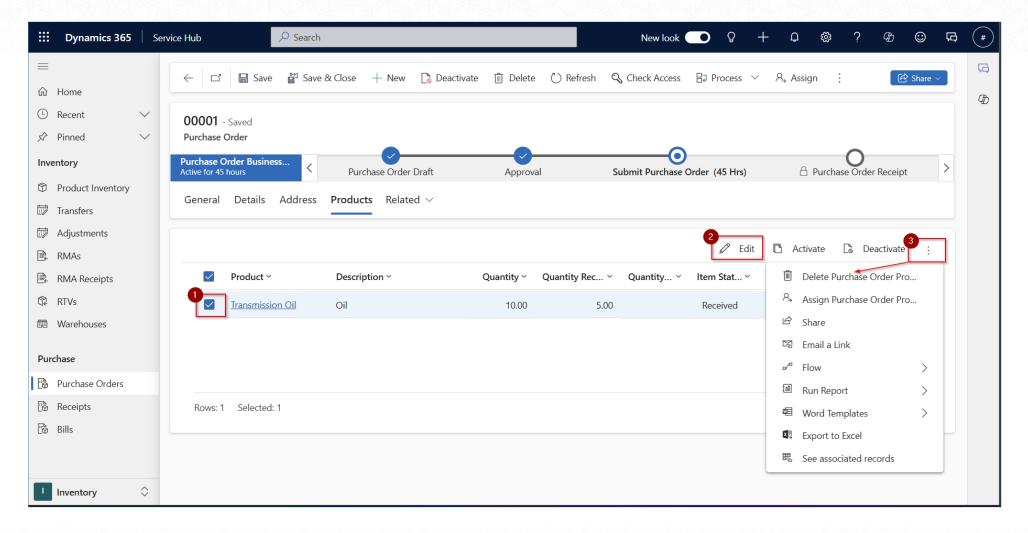


7. Associate the purchase order product record to a warehouse, work order or booking then click Save & Close. Repeat steps 5 to 7 as necessary if adding multiple purchase order products.



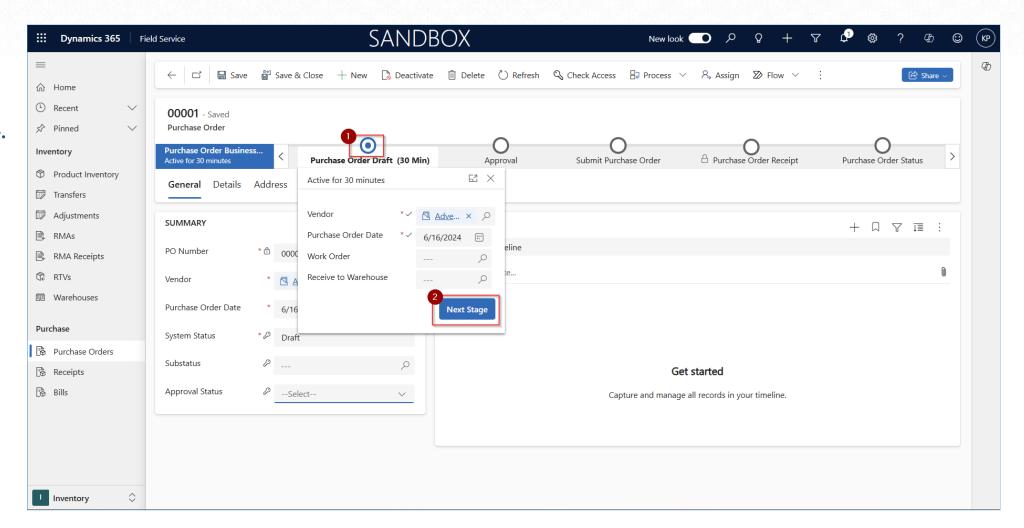


8. [OPTIONAL] tick on a purchase order product record to view additional functions.



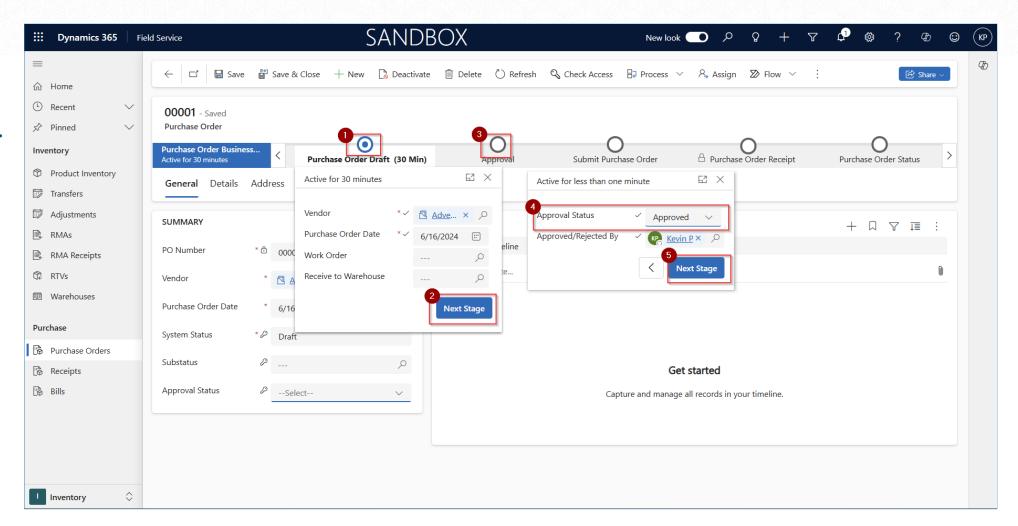


9. Use the business process flow to move the purchase order to the approval stage.



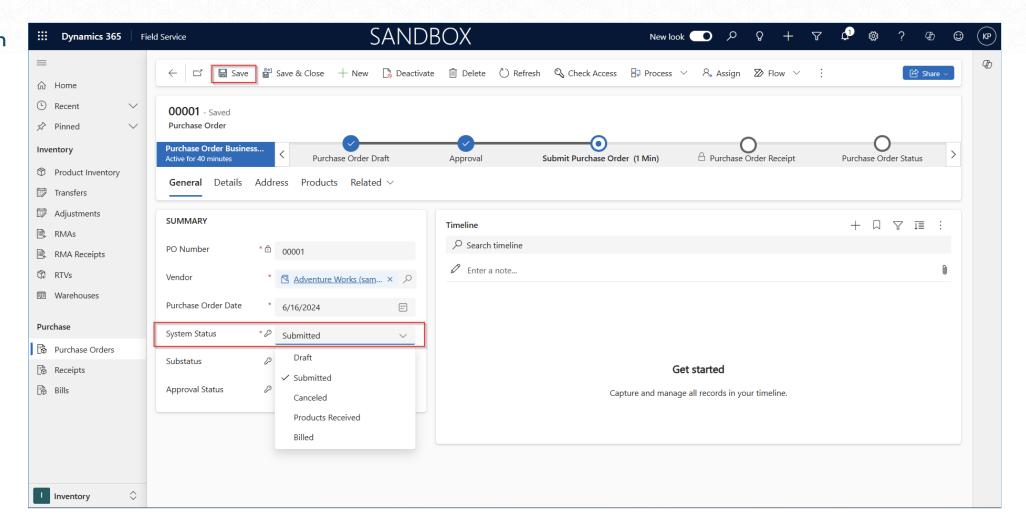


10. Use the business process flow to move the purchase order to the approval stage.





11. Update the System status then Save.



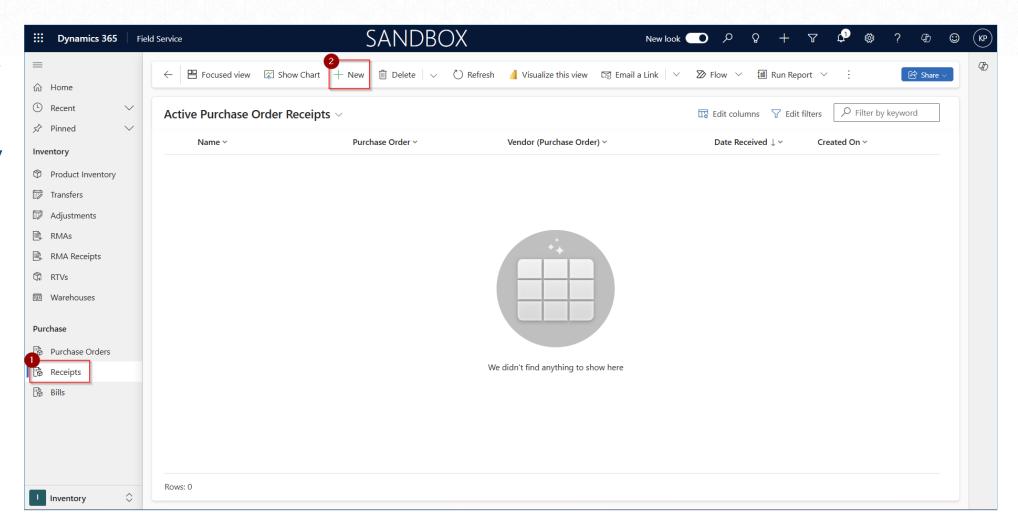
Purchase Orders - Receipts



Receipts can be created to monitor the items specified in purchase order (PO) that has been delivered or fulfilled by the vendor.

To create a purchase order receipt:

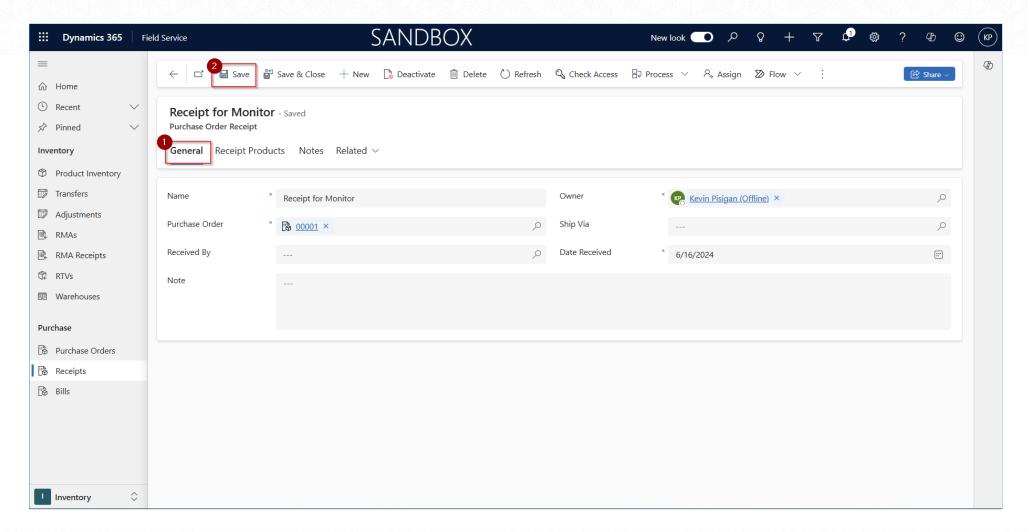
- Go to Inventory ->
 Purchase ->
 Receipts.
- 2. Click + New.



Purchase Orders - Receipts



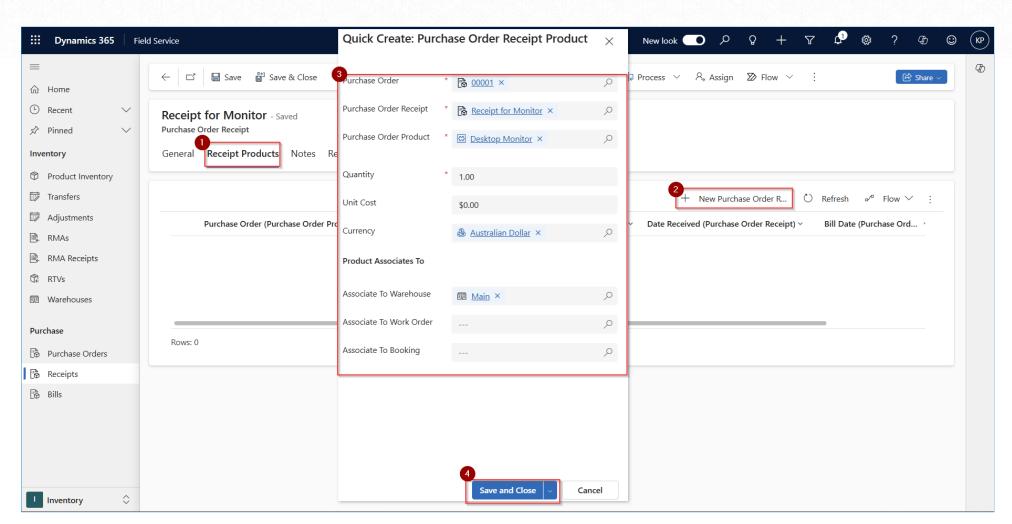
3. Enter required details, especially the related purchase order then click Save.



Purchase Orders - Receipts



- 4. Go to Receipt
 Products to add
 the items
 (requested from
 the related
 purchase order)
 that have been
 received. Click +
 New Purchase
 Order Receipt
 Product.
- 5. Fill in the required details then click Save. Repeat steps as needed when adding multiple records.



Inventory - Warehouses

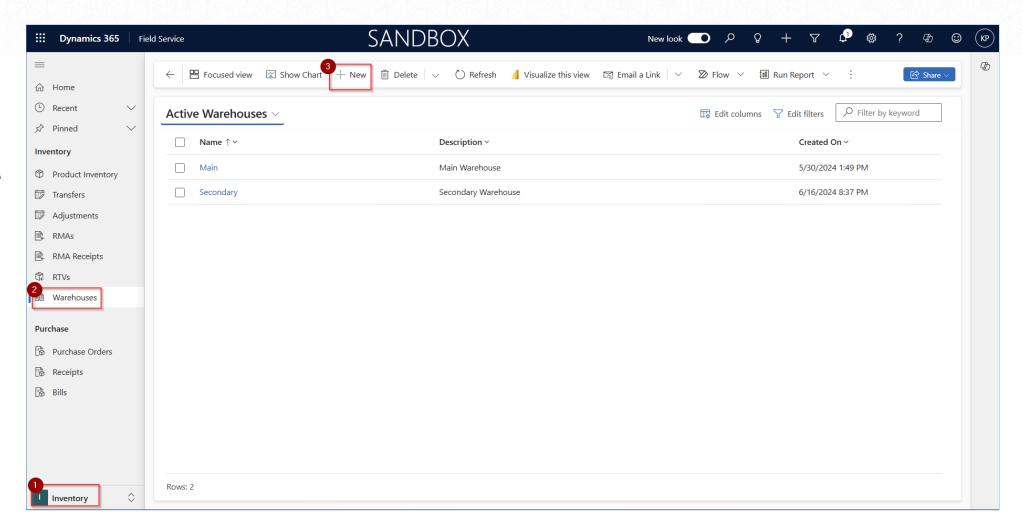


Product inventory can be tracked using a warehouse record in Dynamics 365 Field Service.

To create a warehouse record:

- Go to Inventory ->
 Inventory ->
 Warehouse.
- 2. Click + New.

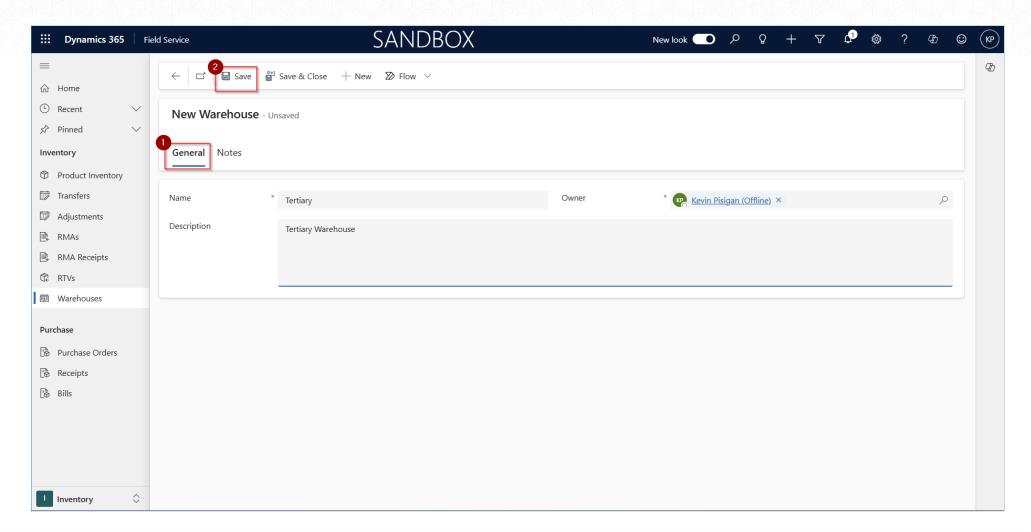
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Inventory - Warehouses



3. Fill in the required details then click Save.



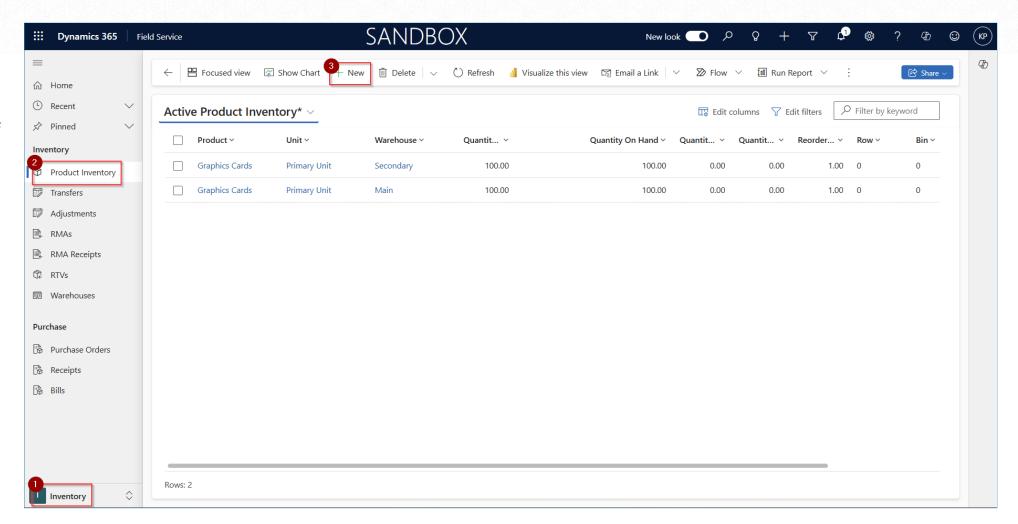
Inventory – Product Inventory



Set up Product inventory within a warehouse record to log the quantities(onhand, on-order, etc.) of a given product. Only product records with "Inventory" as its Field Service Product Type are applicable.

To create a product inventory:

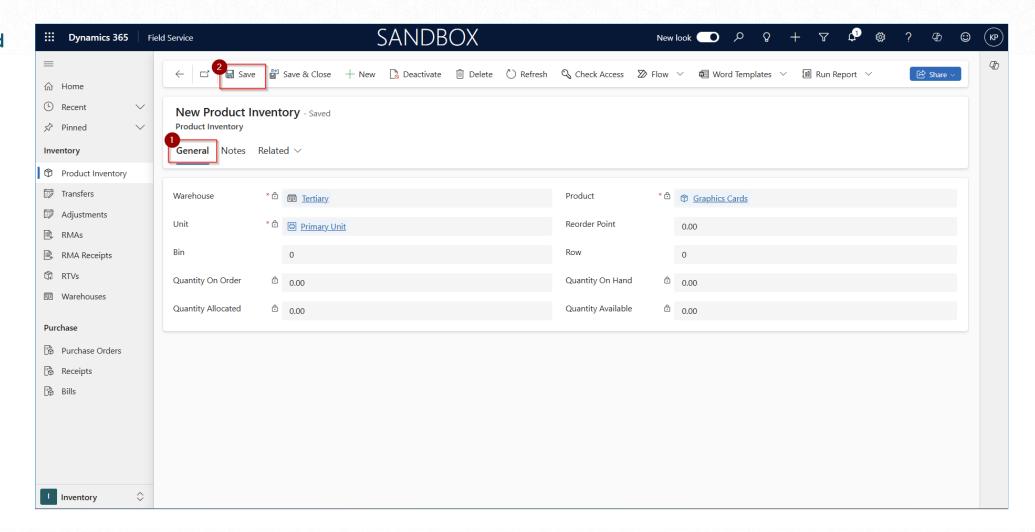
- Go to Inventory ->
 Inventory ->
 Product Inventory.
- 2. Click + New.



Inventory – Product Inventory



3. Fill in the required details then click Save.



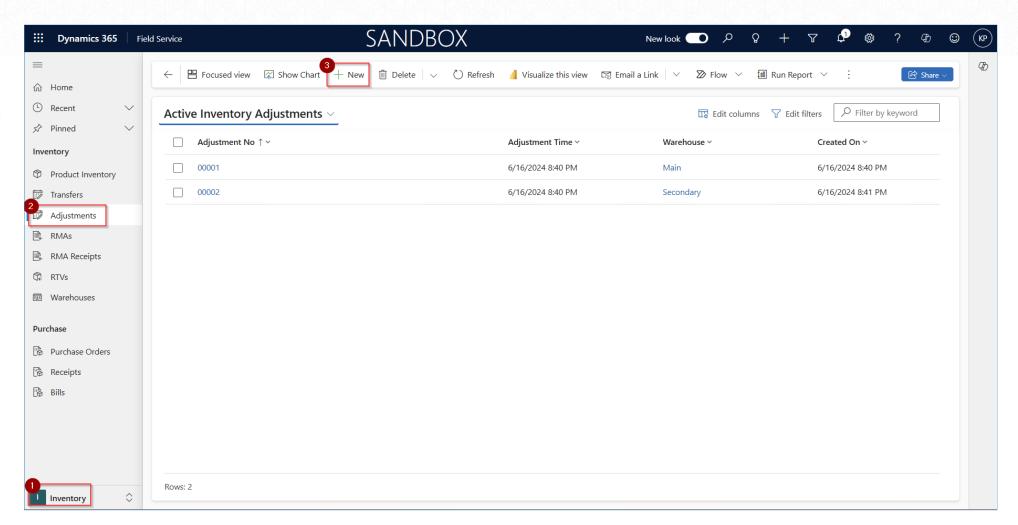
Inventory – Adjustments



Adjustments can be made on product inventory in the event a product is restocked, phased out or for any reason that results in a product's available stock being changed.

To create an adjustment:

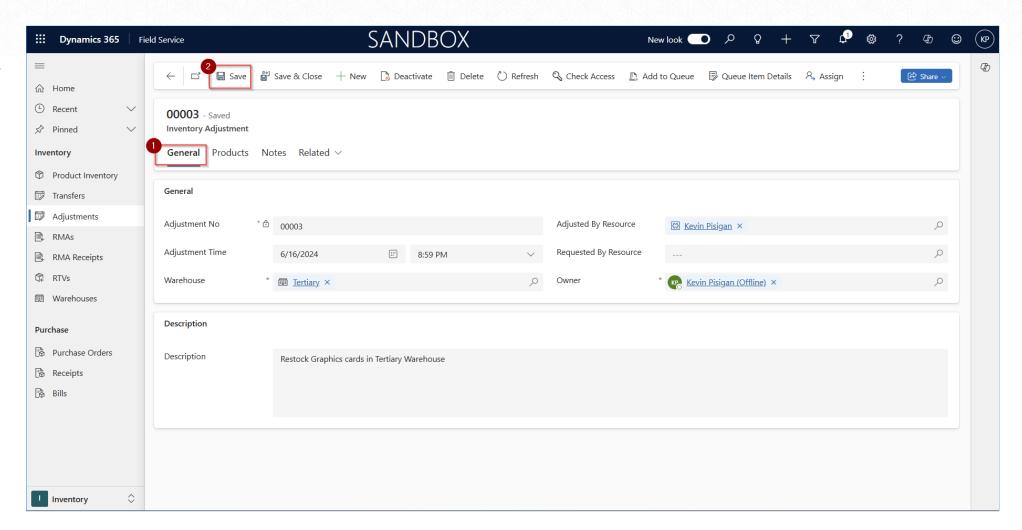
- Go to Inventory ->
 Inventory ->
 Adjustments.
- 2. Click + New.



Inventory – Adjustments



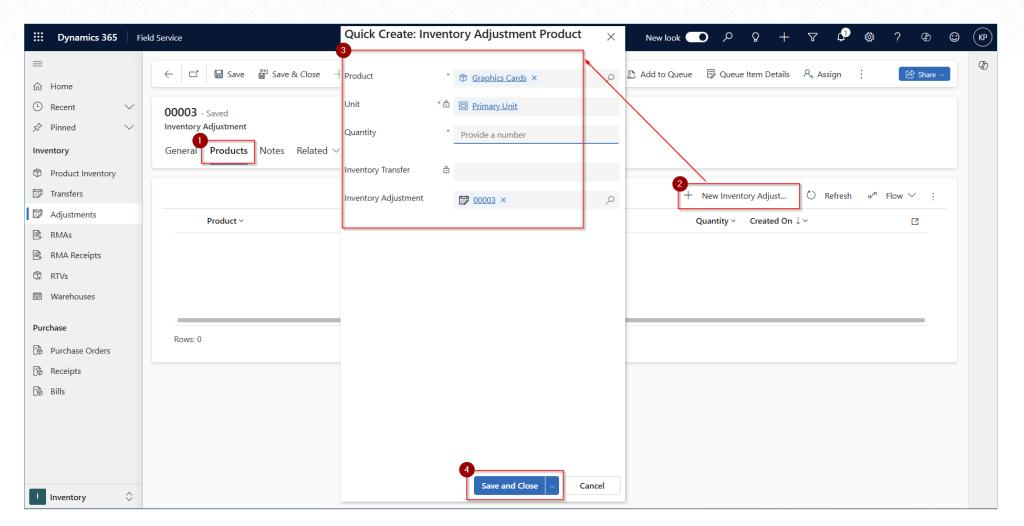
3. Fill in the adjustment details then click Save.



Inventory – Adjustments



4. Go to the Products tab and click + New Inventory Adjustment Product. Update the Quantity then click Save and Close. Repeat steps as needed when adding multiple unique products in the warehouse inventory.



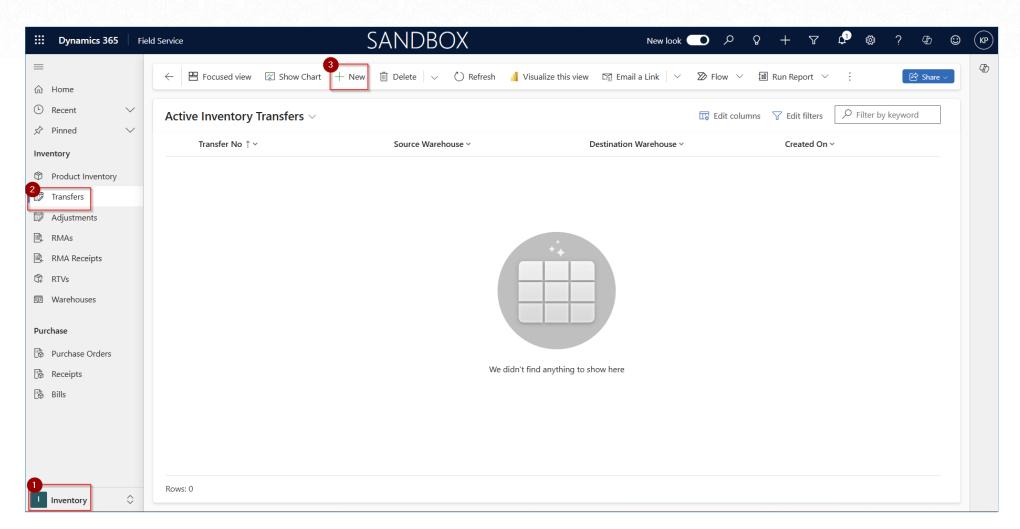
Inventory – Transfers



Inventory transfers
between warehouses
(in case an
organization has
many) can be
recorded in Field
Service.

To create a transfer:

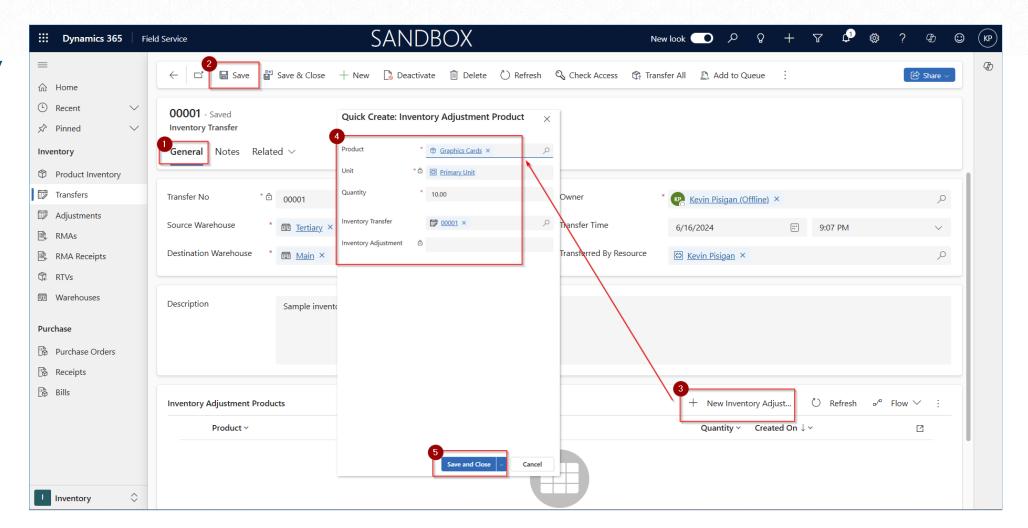
- Go to Inventory ->
 Inventory ->
 Transfers.
- 2. Click + New.



Inventory – Transfers



- 3. Fill in the transfer details, specifically the Source and Destination warehouses then click Save.
- 4. Click + New Inventory Adjustment Product. Enter the product details and the quantity to be transferred then click Save and Close.



References:



- https://learn.microsoft.com/en-us/training/paths/implementing-dyn365-field-service/\(\)
- https://learn.microsoft.com/en-us/dynamics365/field-service/warranties
- https://learn.microsoft.com/en-us/dynamics365/field-service/set-up-customer-agreements
- https://learn.microsoft.com/en-us/dynamics365/field-service/create-work-order
- https://learn.microsoft.com/en-us/dynamics365/field-service/create-purchase-order
- https://learn.microsoft.com/en-us/dynamics365/field-service/mobile-power-app-overview

Questions and answers

- What are your questions?
- What are your concerns?
- What was not mentioned during this presentation?

For further information, contact:



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Gold Enterprise Resource Planning Gold Small and Midmarket Cloud Solutions Silver Cloud Customer Relationship Management



