

Dynamics Field Service Webcast October 2021 Wave 2 Release

November 10, 2021

Introductions



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Introductions



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Agenda

- Wave 2 Overview
- Demonstration - Themes
 - Tailor Customer Experiences
 - Elevate Employee Effectiveness
 - Optimize Service Operations
- Additional Resources
- Q&A



As manufacturers adapt from selling products to selling uptime or operational capabilities as services, field service teams become the linchpin to effective business operations. They are the point of connection between products, customers, and contractual outcomes—but only if they have access to the right information at the right moment in time.

Constellation: Market Overview – Field Service Management Tools – August 2021



Because field service technicians often are the only employees to visit customer sites and assess operations in detail, they have an outsized influence on customer relationships and satisfaction. A growing number of businesses have recognized that as the effective custodians of customer relationships, field service teams are frequently the best source of customer insight and new sales opportunities.

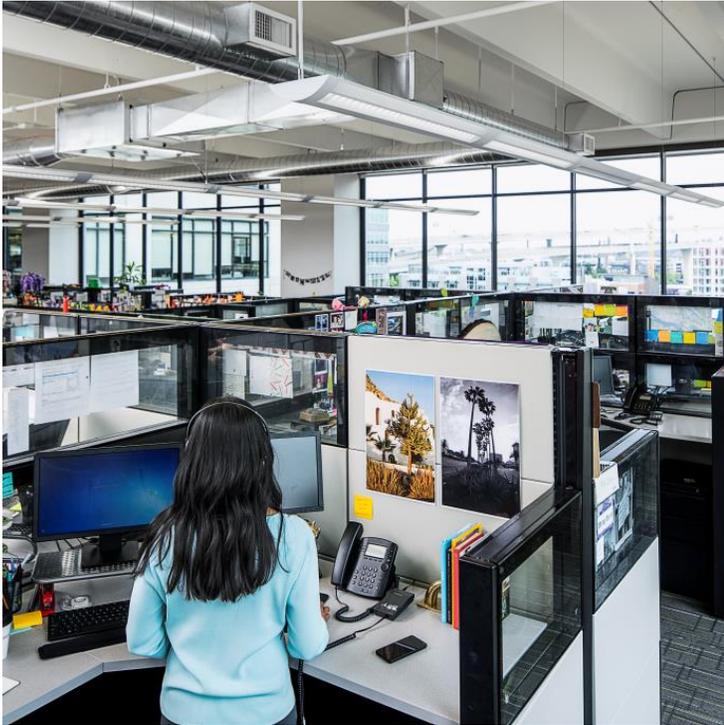
Constellation: Market Overview – Field Service Management Tools – August 2021



Dynamics 365 Field Service Wave 2 2021



Tailor customer experiences



Deliver empathetic connected experiences that adapt to the evolving needs of customers across every channel.

Elevate employee effectiveness



Empower employees across your service organization to solve problems faster with actionable insights, enriched data signals and real-time remote expert support via mixed reality.

Optimize service operations



Drive proactive service with IoT, unlock new service revenue streams, and reduce downtime and service costs.



Dynamics 365 Field Service

Feature summary

Tailor customer engagements

Engage customers with new customer portal homepage*

Enable customers to schedule service visits with a simple web experience

Elevate employee effectiveness

Mobile app available on Windows 10+ (public preview)

Customize the mobile app Booking calendar

Field Service (Dynamics 365) mobile app usability enhancements

Rich notes with embedded mixed reality capture

Collaborate throughout the work order lifecycle with embedded Microsoft Teams

Functional location and asset tree improvements

Optimize service operations

Improvements to new Schedule Board

New feature spotlight in the Field Service Get Started hub

Update work hours via APIs

Simplified Work Order form

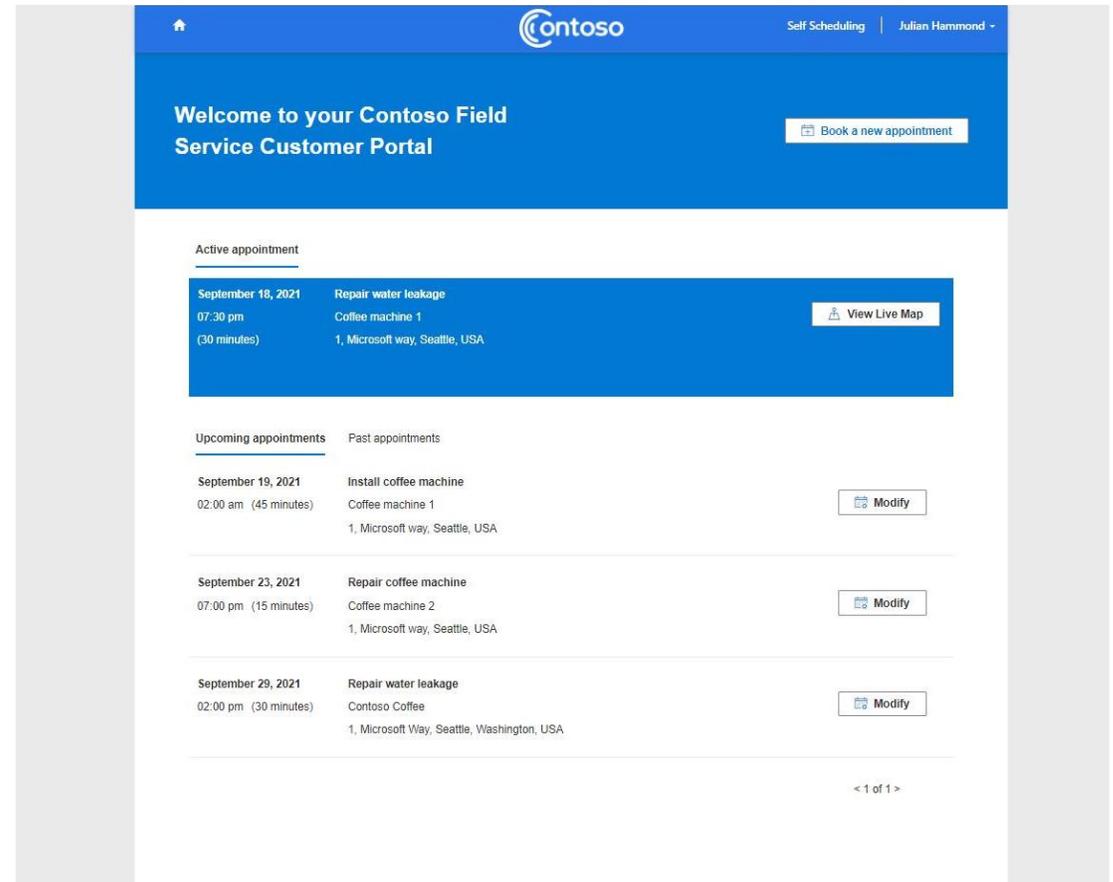


Tailor customer engagements

Deliver empathetic connected experiences that adapt to the evolving needs of customers across every channel.

Engage customers with new customer portal homepage

- Single portal homepage for customer experiences
- View upcoming, active and past appointments
- Self-schedule appointments
- View real-time location of frontline worker
- Built on Power Apps portal, brand customizable and accessible from any device
- They can book new appointments, reschedule or cancel existing appointments and provide feedback for past appointments.



Updates to self-scheduling within customer portal

- Customers self-schedule according to their preferences
- Invite individual customers manually if needed
- Available time slots based on real-time resource availability, location and skillset
- Displays travel duration for end customer
- Collect information pre-service
- Validations and error messages
- Match company brand with customizable look and feel
- Accessible from any device

The screenshot shows the 'Self Scheduling' interface for a user named Julian Hammond. The interface is divided into several sections:

- Header:** Contoso logo, 'Self Scheduling', and user name 'Julian Hammond'.
- Instructions:** 'Please follow steps below to schedule your service visit. If requiring emergency service outside of available times, please reach out to Contoso customer support 555-555-5555.'
- Step 1: Service product:** A dropdown menu showing 'Coffee machine 1'.
- Step 2: Service type:** A dropdown menu showing 'Repair water leakage'.
- Location:** 'Wonder cafe, 1 Microsoft way, Seattle, USA' with a location pin icon.
- Duration:** '30 minutes' with a clock icon.
- Step 3: Select date and time:**
 - Calendar:** A calendar for September 2021. The 18th is selected.
 - Time Available:** A grid of time slots. The 07:30 pm slot is highlighted in blue.
- Additional Information:** A text input field.
- Book Button:** A blue button labeled 'Book'.

Demonstration

Tailor Customer Engagements





Tailor customer engagements

Deliver empathetic connected experiences that adapt to the evolving needs of customers across every channel.

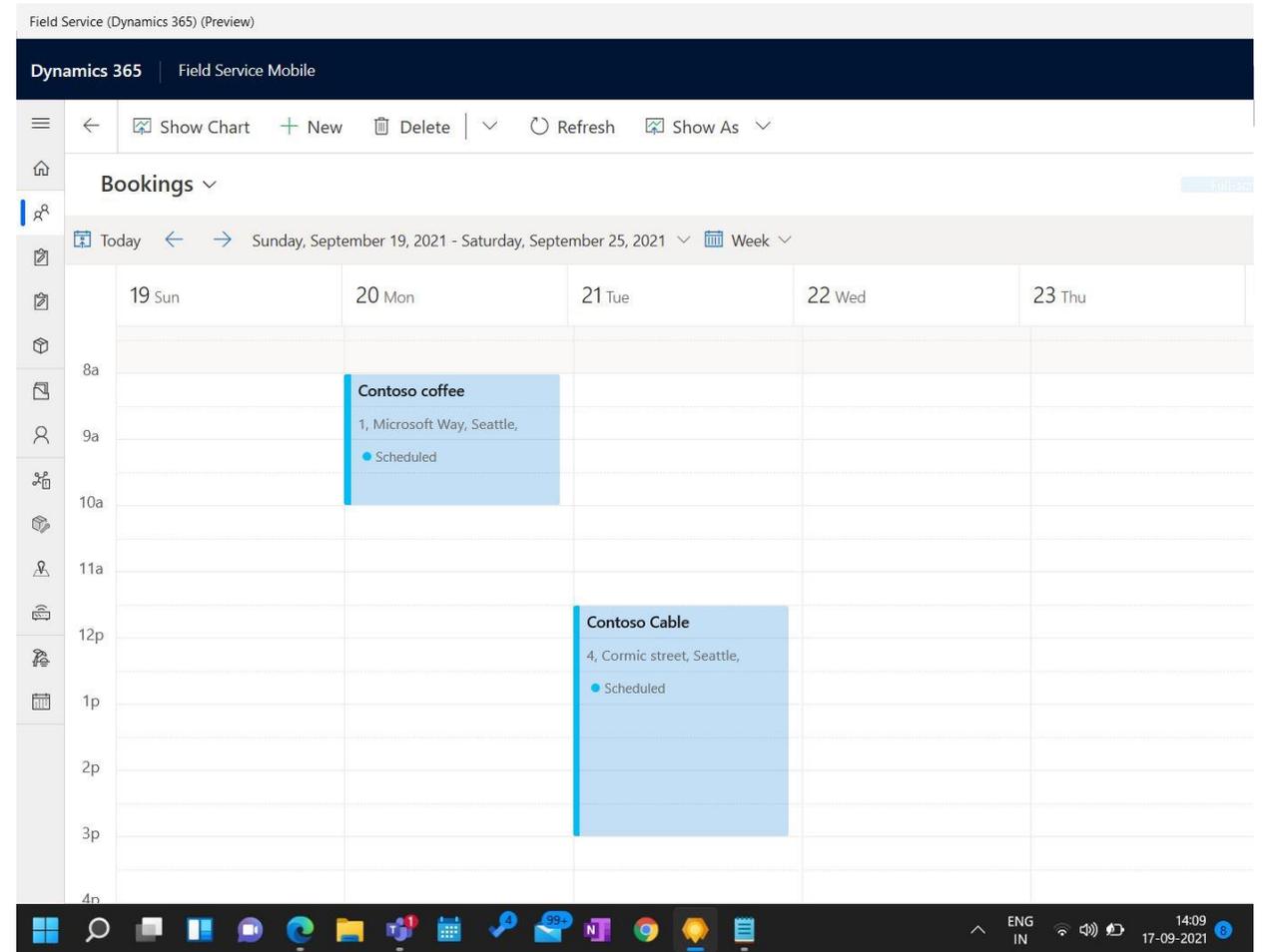


Elevate employee effectiveness

Empower employees across your service organization to solve problems faster with actionable insights, enriched data signals and mixed reality.

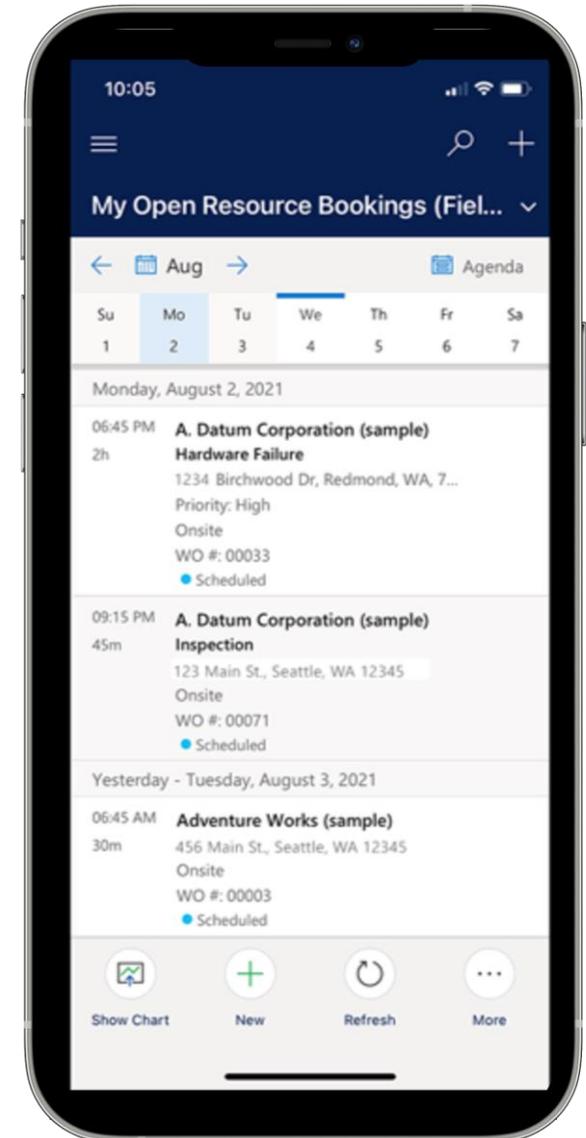
Field Service (Dynamics 365) mobile app on Windows 10+

- Mobile app available for Windows 10+ devices
- Download from Windows store
- Public preview
- Key capabilities
 - Offline by default
 - Access device camera to take pictures and videos
 - Barcode scanning
 - Use deep-links to open records and views or create new records



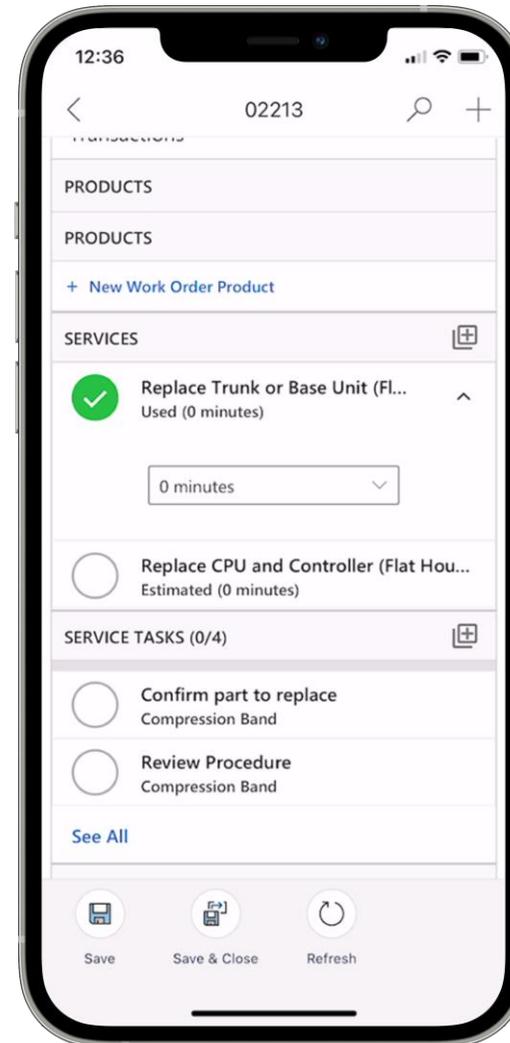
Customize the mobile app Booking Calendar

- Change the primary (bold) field on Booking Calendar control
- Add up to three additional fields of data
- Remove the need to click into Bookings to see key pieces of information



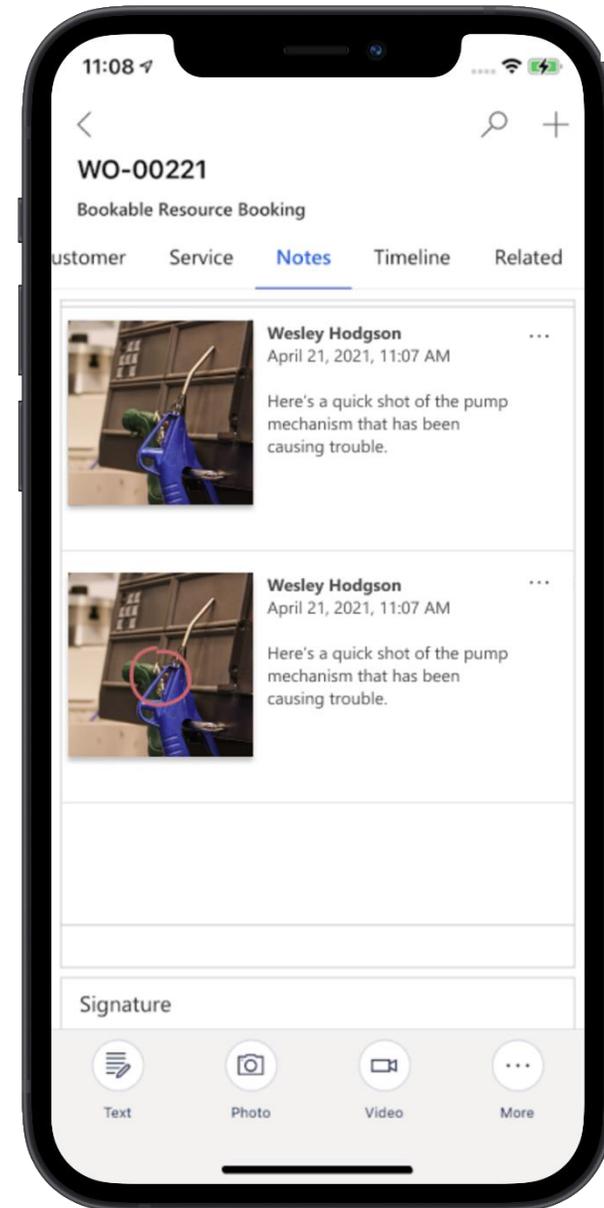
Mobile app usability improvements

- Native OS controls for date/time picker
- Expanding multi-line text boxes
- Service Task sub-grids enabled for work orders



Rich notes with embedded mixed reality capture

- Capture picture/video and add mixed reality annotations
- Add captures to Notes history



Collaborate throughout the work order lifecycle with Microsoft Teams

- Integrated within the work order form
- Initiate chats with one or multiple colleagues
- Automatically links chats to a case and work order
- Associate conversations to the work order for ease of viewing by team members

The screenshot displays the Microsoft Teams interface integrated with a work order management system. The main window shows a chat conversation titled 'Café Duo not working' with a priority of 'High' and a creation time of '02/15/2021 3:00 PM'. The chat history includes messages from Edward Rutledge and a response from the user. The background shows the work order details for 'Café Duo not working' (Case number: WO126534) with various tabs like Summary, Settings, Service Tasks, Products, Services, Address, Record Log, and Related. The Summary tab is active, showing general information, a timeline of events, customer details, and a payment incident section.

Work Order Details:

- Case number: WO126534
- Subject: Café Duo
- Service account: Fourth Coffee
- Billing account: Fourth Coffee
- System status: Open-Scheduled
- Sub status: ---
- Work order summary: ---

Timeline:

- Auto-post on wall Café Duo not working: Trial after queue setup was added to Café Duo ... (2/15/2021 3:15PM)
- Email from Ruprecht Thaddeus: How to set up and configure coffee machines... (2/15/2021 3:15PM)
- Email from Alex Wu: How to set up and configure coffee machines... (2/15/2021 3:13PM)
- Task modified by Contoso Admin: How to set up and configure printers, scanners, and... (2/15/2021 3:12PM)
- Auto-post on wall Café Duo not working: Trial after queue setup was added to Average ord... (2/15/2021 3:12PM)
- Auto-post on wall Café Duo not working: Trial after queue setup was added to Average ord... (2/15/2021 3:12PM)
- Post by Cecil Folk: Description of timeline item lorem ipsum dolor sisd... (2/15/2021 3:11PM)

Customer Details:

- Primary contact: ---
- Email: coffeemachine@fourthcoffee.com
- Main phone: 725-055-0179

Payment Incident:

- Primary incident type: Water Flow Issues
- Primary incident description: Water flow issues due to water supply
- Primary incident: 2 75 hours

Chat History:

- Edward Rutledge (2:30 PM): Hi team, I think it's an edge hardware issue. Based on the performance log, I recommend doing a part replacement.
- User (2:30 PM): Sounds good. Thanks, Edward. I'll go ahead to schedule it.

Functional location and asset tree improvements

- Quicker and easier experience to find locations and assets
- See number of matching records
- Expand and collapse entire tree
- Matching search results are highlighted and bolded

The screenshot shows the Dynamics 365 Field Service interface. The top navigation bar includes 'Dynamics 365' and 'Field Service'. The main content area is titled 'Advanta Campus - Saved Functional Location'. Below the title, there are tabs for 'General', 'Assets and Locations', and 'Related'. A search bar contains the text 'hvac' and a 'Show assets' checkbox is checked. The search results are displayed in a tree view under the heading 'Matches found: 2'. The tree structure is as follows:

- Advanta Campus
 - Advanta A
 - Room 101
 - Room 102
 - Room 201
 - Room 202
 - HVAC Unit**
 - Advanta B
 - HVAC Unit**
 - Advanta C
 - Advanta Dining Hall

Demonstration

Elevate Employee Effectiveness





Elevate employee effectiveness

Empower employees across your service organization to solve problems faster with actionable insights, enriched data signals and mixed reality.



Optimize service
operations

Drive proactive service with IoT, unlock new service revenue streams, and reduce downtime and service costs.

Improved user experience with schedule board enhancements

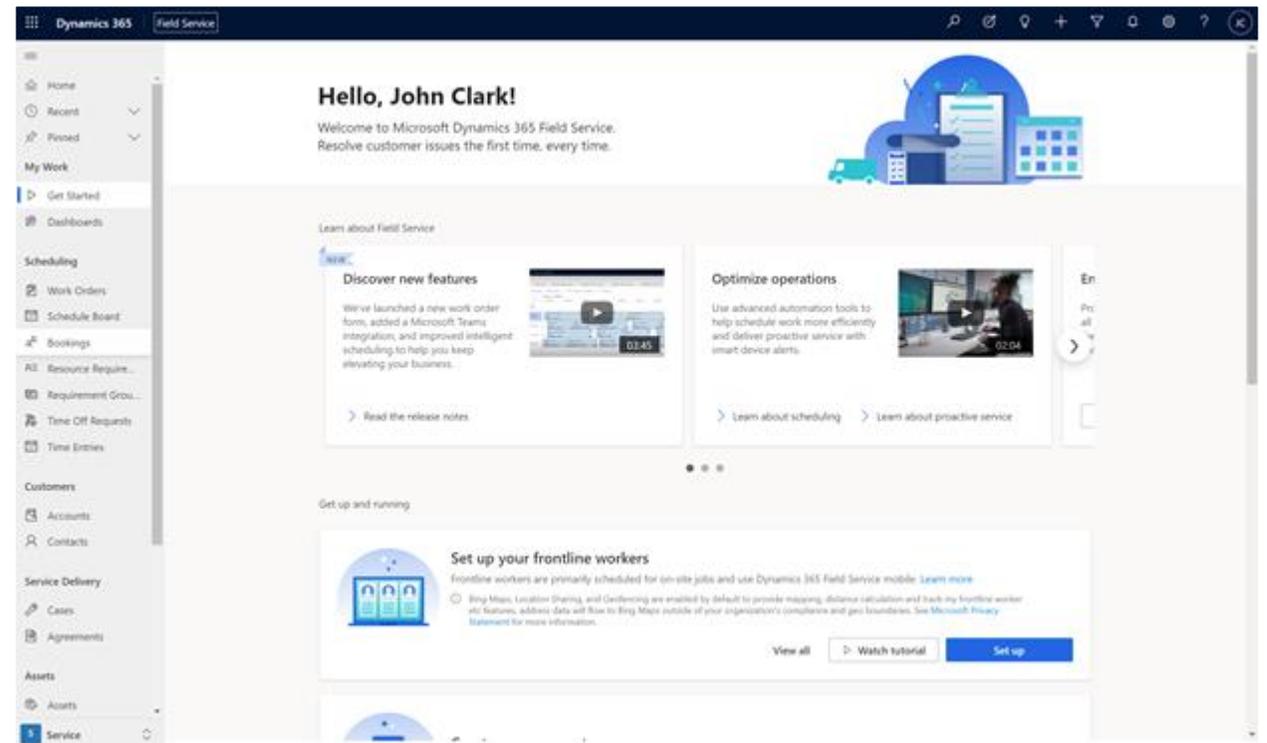
- Feature parity with legacy schedule board
- Performance and usability performance
- Find availability (schedule assistant)
- Setting and alerts tabs
- Create new schedule board tabs
- Edit schedule board settings
- Extend hourly view via different client (scripts, stylesheets, and localization)

The screenshot displays the Dynamics 365 Resource Scheduling interface for 'Fabrikam Service' on Friday, 3/26/2021. The main view is a Gantt chart showing resource availability and task assignments. Resources listed include Brady Hannon (14% booked), Edgar Domínguez (18% booked), Efrain Schreiner (11% booked), Jorge Gault (10% booked), Joseph Gonsalves (10% booked), Kris Nakamura (12% booked), Luke Lundgren (6% booked), and Matthew Everson. Tasks are represented as bars with durations and fulfillment percentages. For example, 'City Power' is a 2h 07m requirement for Brady Hannon, and 'IOT Device installation' is a 2h 59m requirement for Kris Nakamura. A map on the right shows the geographic distribution of resources. Below the Gantt chart, an 'Unscheduled Jobs' table is visible:

<input type="checkbox"/>	Name	From Date	To Date	Duration	Fulfilled Duration	Remaining Duration	Priority	Territory	Time From Promised	Time To Promised
<input type="checkbox"/>	Urgent - Repair furnace			2 hrs		2 hrs				
<input type="checkbox"/>	Trey Research Installation			2 hrs 30 mins		2 hrs 30 mins				
<input type="checkbox"/>	Contoso Electric Installati...			2 hrs		2 hrs				

New feature spotlight in the Field Service Get Started hub

- New carousel view introduces new features, videos and links to documentation
- Video tutorials to get up and running with Field Service



Edit work hours via APIs (Resource Work Hours Extensibility)

- Create, update, delete working hours via APIs
- Saves time for bulk edits
- Provides flexibility
- Supports integration scenarios

The screenshot displays the 'Abraham McCormick' Work Hours interface. The top navigation bar includes a back arrow, 'Save', 'Save & Close', '+ New', 'Show Work Hours', 'Deactivate', 'Delete', 'Refresh', 'Check Access', and a menu icon. Below the navigation bar, the resource name 'Abraham McCormick' is shown, along with 'Bookable Resource · Information'. The main navigation tabs are 'General', 'Project Service', 'Field Service', 'Scheduling', 'Omnichannel', 'Work Hours' (selected), and 'Related'. The calendar view shows the following work hours:

Day	Work Hours
Aug 29 (Sunday)	
Aug 30 (Monday)	9:00 AM Working
Aug 31 (Tuesday)	9:00 AM Working
Sep 1 (Wednesday)	9:00 AM Working
Sep 2 (Thursday)	9:00 AM Working
Sep 3 (Friday)	9:00 AM Working
Sep 4 (Saturday)	
Sep 5 (Sunday)	
Sep 6 (Monday)	9:00 AM Working
Sep 7 (Tuesday)	9:00 AM Working
Sep 8 (Wednesday)	9:00 AM Working
Sep 9 (Thursday)	9:00 AM Working
Sep 10 (Friday)	9:00 AM Working
Sep 11 (Saturday)	
Sep 12 (Sunday)	
Sep 13 (Monday)	9:00 AM Working
Sep 14 (Tuesday)	9:00 AM Working
Sep 15 (Wednesday)	9:00 AM Working
Sep 16 (Thursday)	9:00 AM Working
Sep 17 (Friday)	9:00 AM Working
Sep 18 (Saturday)	

Simplified work order form

- Simplified command ribbon
- Ability to turn price calculations on/off
- Error dialogs
- Simplified time commitments
- Location sharing enabled by default for new environments

The screenshot displays the Dynamics 365 Field Service interface for a Work Order (WO -1000000103). The interface is organized into several sections:

- Command Ribbon:** Located at the top, it includes buttons for Save, Save & Close, New, Book, Create Incident Type, Delete, Create IoT Flows, Refresh, and Run Report.
- Work Order Header:** Shows the Work Order Number (WO -1000000103) and its status (Saved). A progress bar indicates the work order is active for 54 hours, with buttons for Schedule Work Order and Close Work Order.
- Navigation Tabs:** Summary (selected), Settings, Products, Services, Service Tasks, Articles, Location, Record Log, and Related.
- GENERAL Section:** Contains fields for Work Order Number (WO -1000000103), Service Account (Fourth Coffee Northwest), Billing Account (Fourth Coffee Northwest), Functional Location, System Status (Scheduled), Substatus (Proposed), Work Order Type (Install or replace), Work Order Summary, Work Hour Template, SLA, and SLA Timer (Succeeded).
- Timeline Section:** Features a search bar, a note entry field, and a "Get started" button with the instruction "Capture and manage all records in your timeline."
- PRIMARY INCIDENT Section:** Shows the Primary Incident Type (Replace Broken Part), Primary Incident Description, and Primary Incident Estimated Duration (2.5 hours).
- CUSTOMER DETAIL Section:** Includes fields for Primary Contact, Email, and Address Phone.
- INCIDENTS Section:** Lists a primary incident: Replace Broken Part (RP) for WO -1000000103.
- BOOKINGS Section:** Lists two bookings: WO -1000000103 (WI) and WO -1000000103 (WI).

Demonstration

Optimize Service Operations





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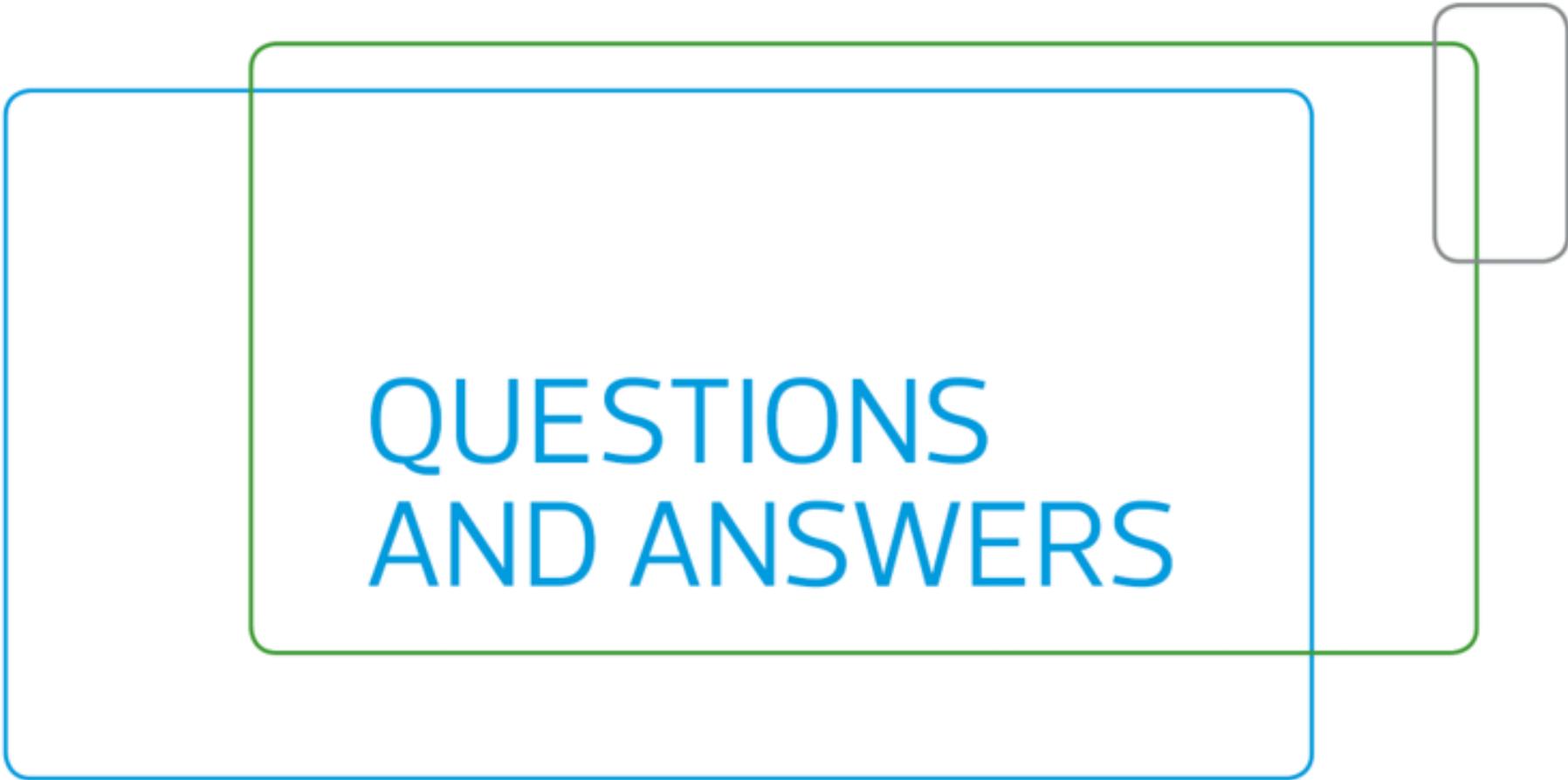
Simplified Work Order form

Field Service Resources

- Bill.caldwell@rsmus.com
- Scott.lefante@rsmus.com
- Business Developer: chris.guido@rsmus.com
- ***Check out our CRM Experts presence on the web.***
 - [RSM Technology Blog](#)
 - [Dian Taylor \(MVP\)](#)
 - [Scott LeFante \(MVP\)](#)
- Microsoft Field Service Wave 2: <https://docs.microsoft.com/en-us/dynamics365-release-plan/2021wave2/service/dynamics365-field-service/>
- Field Service Microsite - <https://rsmus.com/what-we-do/services/technology/crm/microsoft-dynamics-365-crm/field-service.html>



THANK YOU FOR
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ATTENTION



QUESTIONS AND ANSWERS



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