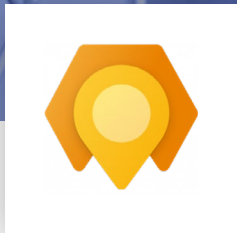


# Microsoft Dynamics 365

## Field Service



Elevate your customer service operations with Microsoft Dynamics 365 Field Service, the cutting-edge solution designed to optimise your field service management. Intelligently schedule and dispatch the right resources to the right job, Dynamics 365 Field Service ensures timely and efficient service delivery.

### Dynamics 365 Customer Experience

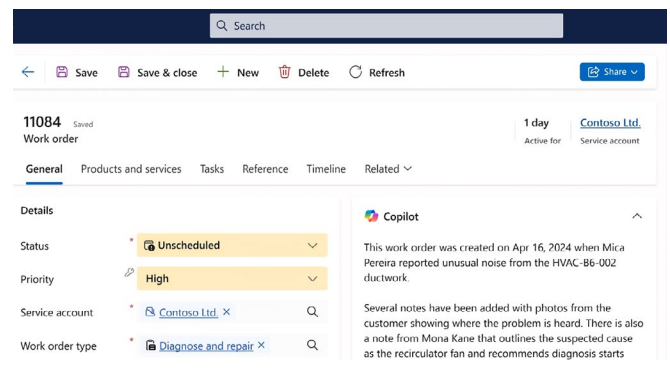
Customer Service

Field Service

Sales

Customer Insights - Journey & Data

Project Operations



### EXPERIENCE THE POWER OF A UNIFIED PLATFORM

Field Services seamless integration with Dynamics 365 Sales and Microsoft 365 creates a unified platform for comprehensive service management. Mobile capabilities ensure your technicians have immediate access to the information they need, no matter where they are. Investing in Dynamics 365 Field Service will transform your service operations, enhance efficiency, and strengthen customer relationships.



## D365 Field Service

- Lead Management
- Account Management
- Contact Management
- Stakeholder Interactions
- 360° view of records
- Mobile version available
- Opportunity Management
- Inventory Management
- Work Order Management
- Work Order Scheduling
- Resource Management
- Booking Management
- Case Management
- Customer Asset Management
- Purchase Orders
- IoT Capabilities
- Field Service Insights
- Dashboards & Reporting
- Power BI Integration
- SharePoint Integration
- Outlook Integration
- Teams Chat & Calling Integration
- Power Automate Workflows

## Functionality Overview



### Microsoft Copilot (AI) Functionality



## Why Implement Dynamics 365 Field Service?


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**CENTRALISED SCHEDULING**  
**Easy Scheduling:** Provides tools for scheduling, dispatching resources & equipment needed for customer service.  
**Improved Visualisation:** Dispatchers can visualise onsite appointments and optimise service schedules.
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**IMPROVED FIRST-TIME FIX RATE**  
**Right Resources:** D365 Field Service helps direct the right technician with the right skills to perform specific jobs.  
**Efficient Resolution:** Ensures efficient problem resolution during the initial service call.
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**OPTIMISED SHIFTS**  
**Better Processes:** Efficiently manage technician shifts by centralising scheduling, resource allocation, and routing. This results in better utilisation of field service.
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**ENHANCED COLLABORATION**  
**Shared Workspaces:** Features like Microsoft Teams integration enable sales teams to collaborate in real-time.  
**Co-authoring:** Multiple people can work on the same records simultaneously, enhancing collaboration.
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**MOBILE ACCESSIBILITY**  
**Mobile App:** Technicians can access work orders, customer information, and service details on their mobile devices. This mobility improves responsiveness and allows for real-time updates.



**PREDICTIVE MAINTENANCE**  
**Keep Ahead of the Game:** By analysing data from connected devices, Dynamics 365 Field Service enables predictive maintenance. Organisations can proactively address equipment issues before they lead to downtime.



**REAL-TIME INSIGHTS**  
**Greater Global Visibility:** Organisations gain real-time visibility into field service operations. Dispatchers, technicians, and other stakeholders can monitor efficiency, track service history, and maintain customer satisfaction.



**ENHANCED CUSTOMER EXPERIENCES**  
**State of the art experience:** Streamlined processes, accurate scheduling, and efficient service delivery result in better customer experiences. This can lead to increased loyalty and positive brand perception.



**COMPLIANCE AND SECURITY**  
**Data Security:** Leverages Microsoft's robust security framework to protect sensitive customer data.  
**Regulatory Compliance:** Helps businesses comply with regulatory requirements, such as GDPR.



## Dynamics 365 Business Applications

Microsoft Dynamics 365 is the next generation of intelligent business applications that enable your organisation to grow, evolve and transform. These solutions unify CRM and ERP capabilities with purpose-built applications that work seamlessly together to help manage specific business functions. **Dynamics 365 transforms your organisation to meet customer needs and capture new opportunities.**

### Better Together

**FIELD SERVICE:** Identify & create opportunities in the field for sales teams.

**CUSTOMER SERVICE:** Get a complete view of your customers, including activity history, key contacts, communications, and internal account discussions.

**PROJECT OPERATIONS:** Help sales and delivery teams engage customers and deliver billable projects on time & within budget.

**CUSTOMER INSIGHTS (Marketing Automation & Customer Data Platform):** Enable marketing and sales to work closely to manage all interactions throughout the customer journey. Connect data from various transactional, behavioural, and observational sources to create a 360-degree customer view.

## Benefits of Dynamics 365 Field Service

### OPTIMISED SCHEDULING & DISPATCHING

Assign the right technician with the right skills at the right time, reducing travel time and ensuring efficient resource utilisation.

### PROACTIVE MAINTENANCE

Utilises IoT and real-time monitoring to detect and address issues, minimising downtime and enhancing customer satisfaction.

### ENHANCED MOBILITY

Provides field staff with mobile access to customer data, work orders, and inventory, enabling them to stay informed.

### COMMUNICATION & COLLABORATION

Integrates with Dynamics 365 Sales and M365, allowing for unified workflows and real-time collaboration between departments.

### ANALYTICS & REPORTING

Advanced analytics and dashboards to track performance, to continuously improve field service operations.