Dynamics 365 for Field Service - User's Guide
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Manage your field service operations with Microsoft Dynamics 365 for Field Service

Field Service capabilities extend Microsoft Dynamics 365 (online) to provide a complete Field Service management solution, including service locations, customer assets, preventative maintenance, work order management, resource management, product inventory, scheduling and dispatch, mobility, collaboration, customer billing, and analytics. Microsoft Dynamics 365 for Field Service helps you:

- Optimize your service schedule with efficient routing, resource skill matching, and reduced travel time.
- Increase first time fix rates and on-time delivery performance.
- Enhance real-time communication and collaboration between customer service, dispatch, field agents, and customers.

**Note**
The capabilities in this solution require Microsoft Dynamics CRM Online 2016 Update 1.

**Work order management**
Quickly generate work orders, encompassing all of the information you need to dispatch field agents to service locations.

**Schedule board and dispatch**
A flexible drag-and-drop schedule board lets dispatchers assign resources and set up schedules for multiple work orders using a list or map view.

**Resource management**
Configure resource information to allow Field Service to efficiently match the best field agent to a work order based on availability, proximity to service location, and required skills.

**Service locations and customer assets**
Store and manage information about your customers’ service locations and serviceable customer assets.

**Preventative maintenance**
Configure service agreements for your customers that will automatically generate recurring work orders to ensure equipment is properly maintained before issues occur.

**Inventory management**
Extend the Dynamics 365 product catalog with an inventory management system that tracks real-time inventory levels by warehouse, including mobile truck stock.

**Customer billing**
Completed work orders can be turned into customer invoices for customer billing.

**Mobile app**
The mobile app gives field techs quick and easy access to everything they need to execute a work order, including schedule information, customer contact information, turn by directions, and more.
The following guide will help you set up and use Microsoft Dynamics 365 for Field Service:
Dynamics 365 for Field Service - User's Guide

Install Microsoft Dynamics 365 for Field Service

Microsoft Dynamics 365 for Field Service is an end-to-end solution that you can use to manage your field service team.

**Important**

- The capabilities in this solution require Microsoft Dynamics 365.
- Before you install the Field Service solution, you need to accept the terms and conditions to configure it in Dynamics 365.

Install Field Service (online)

Microsoft Dynamics 365 for Field Service is a preferred solution. There are several ways to install it.

**Important**

You can't run an older version of Microsoft Dynamics 365 for Project Service Automation and a new version of Microsoft Dynamics 365 for Field Service on the same instance.

Install Field Service (on-premises)

This feature is supported of the way of the December 2016 Update for Microsoft Dynamics 365 (online) or later. Before you install Field Service (on-premises) make sure you have the following:

- A Microsoft Dynamics 365 for Field Service Enterprise Edition (online) license, or a Dynamics 365 Enterprise Plan 1 or Plan 2 (online) license. More information: Read "Dual Use Rights" in the Licensing and Pricing Guide.
- Active on-premises deployment of Microsoft Dynamics 365 Server.
- A user account with Office 365 Global Administrator (online) and Dynamics 365 Directory Administrator (on-premises) credentials.

1. To download and install Field Service (on-premises), go to: Microsoft Dynamics 365 Downloads.
2. Read and accept the license agreement.
3. Extract the files. The package deployer installation tool will launch automatically.

**Note**

If the installation tool doesn't launch, run the PackageDeployer.exe tool from the Field Service sub-folder in the installation folder.
4. On the **Connect to Microsoft Dynamics CRM** screen, select **On-premises Deployment Type** and then enter your administrator credentials for the server.

5. Click **Next** and proceed through the installation steps.

6. On the **Dynamics 365 for Field Service License Validation** screen, enter your Dynamics 365 (online) administrator credentials and then click **Next**.

7. Proceed through the installation steps to complete the installation.

The following online services or capabilities are not supported for on-premises use:

<table>
<thead>
<tr>
<th>Service or Capability</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Schedule Optimization</td>
<td>Cloud-based add-on service that automates the assignment of resources to match work based on skills, availability, travel time, and other resource profile and work requirements.</td>
</tr>
<tr>
<td>Connected Field Service</td>
<td>Cloud-based integration and process extension that connects Field Service to the Azure IoT Suite through the Internet of Things connector.</td>
</tr>
<tr>
<td>Office 365 Exchange integration</td>
<td>Cloud-based integration that enables synchronization of assigned work and appointments with individual user calendars.</td>
</tr>
<tr>
<td>Power BI</td>
<td>Cloud-based suite of business analytics tools to analyze data and share insights.</td>
</tr>
<tr>
<td>Portal capabilities for Microsoft Dynamics 365</td>
<td>Cloud-based portal experiences that depend on online services.</td>
</tr>
<tr>
<td>Voice of the Customer for Microsoft Dynamics 365</td>
<td>Cloud-based service to create and send surveys for feedback from your customers about products or services.</td>
</tr>
<tr>
<td>Integration with Glympse</td>
<td>Connection to a third party, cloud-based service that enables businesses and channel partners to provide the benefits of real-time location sharing to their customers.</td>
</tr>
<tr>
<td>Dynamics 365 for phones and tablets – mobile offline</td>
<td>Enhanced offline experiences for mobile users that depends on cloud-based services for synchronization.</td>
</tr>
<tr>
<td>System Telemetry</td>
<td>Cloud-based insights into system operations and performance.</td>
</tr>
</tbody>
</table>

**Add users**

To learn more, see: [View user accounts and security roles (Field Service)](#).
Enable help for Field Service
To make sure users get the right information when they click the Help button, you need to set Dynamics 365 to use custom Help. Go to Settings > Administration, click System Settings, click the General tab, and select Yes for Use custom Help for customizable entities.

Customize Field Service forms and reports
If you want to customize any of the Field Service forms, dashboards, or reports, you can find more information about customizing Microsoft Dynamics 365 in the following links:
- TechNet: Customize your system
- TechNet: Create and design forms
- TechNet: Create and edit dashboards
- TechNet: Create and edit processes
- MSDN: Developers guide to reports for Microsoft Dynamics 365

View user accounts and security roles
A user in Field Service is a member of your organization who will use a Field Service license. Security roles define which entities a user can view as well as how they can interact with those entities. Field security profiles define which fields a user can see. As an example, a user may have permission to see accounts but not to see specific fields for an account. Field Service comes with four predefined security roles and field security profiles:
- Field Service Administrator: Generally assigned to key people within the organization who need access to the Administration tile. Global access to all Field Service entities.
- Field Service Dispatcher: Generally people in the organization who are responsible for scheduling and need to manage resources and work orders.
- Field Service Resource: Generally people within the organization who will access Field Service from a mobile device.
- Field Service Inventory Purchase: Generally people within the organization who are responsible for inventory, purchase orders, RMAs, and RTVs.

To view or enter information for an existing user account
- Go to Microsoft Dynamics 365 > Settings > Security > Users.

The following table describes the fields.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Information</td>
<td>User Name: Validates the user record against Active Directory. Users must be created in Active Directory before being added to Field Service.</td>
</tr>
</tbody>
</table>
Use Connected Field Service to remotely monitor and service customer equipment

Use Connected Field Service for Microsoft Dynamics 365 to monitor connected devices and always know your customer’s equipment is functioning correctly. If equipment fails, you’ll be notified so that you can troubleshoot the problem remotely, or send a technician to fix it.

Connected Field Service for Microsoft Dynamics 365 helps service organizations move from a costly break-fix model to a more proactive service model by combining monitoring and predictive maintenance with Internet of Things (IoT). More information: Manage your IoT devices with Connected Field Service

Key benefits of Connected Field Service:

- Reduce downtime with proactive alerts from connected devices.
- Address issues faster by remotely monitoring devices and keeping customers in the loop.
- Reduce maintenance costs by dispatching a technician with the right expertise, availability, and location to the job.

Note

This feature is supported in December 2016 Update for Microsoft Dynamics 365 (online). Interested in getting this feature? Find your Dynamics 365 administrator or support person

Prerequisites

Before you install Connected Field Service for Microsoft Dynamics 365, make sure you have the following:
• Dynamics 365 for Field Service solution. More information: Install Microsoft Dynamics 365 for Field Service

• O365 Global Administrator or Dynamics 365 System Administrator credentials.

• An IoT – Administrator role in the IoT solution (to access IoT entities and IoT functionality), plus another role, like Field Service – Dispatcher (to access Dynamics 365).


• Microsoft Power BI PRO and the sample report template. More information: Download the Power BI Template for Connect Field Service

Install Connected Field Service

Install the Connected Field Service solution from your Office 365 admin portal. The solution includes a sample thermostat simulator app that you can use to send test alerts to connected devices that are registered in field service. Developers can also use the simulator as a sample template to further customize the app. More information: Connected Field Service Developer Guide

1. Sign in to https://portal.office.com with your Global Administrator or Dynamics 365 system administrator credentials.

2. Click Admin centers > Dynamics 365

3. Click the Applications tab, and then select Connected Field Service.

4. Click Manage.

5. Read and accept the Terms of service.

6. In the Installing Azure Required Assets dialog box, enter your Azure account, click Sign In User, and then follow the sign-in process.

7. In the Selecting Azure Subscription dialog box, select the Azure subscription that you want to create resources under and then click Next.

8. In the Choose a resource group dialog box, create a new resource group or use an existing resource group.

9. Optional Step for Power BI. To install the Azure SQL database that is used for Power BI, check the Enable Power BI Integration box, and then enter the Azure SQL database user name and password.

✓ Note

To Power BI, you will also need to download a PBIX (PowerBI desktop file) to publish reports.

10. Click Deploy.

After you’ve installed all required Azure resources, click Authorize to configure the Dynamics 365 connector connection API. When you configure the connection API you’ll need to enter your Dynamics 365 subscription account.
Note

Before you click the Authorize button, make sure all required Azure resources are successfully deployed and that the overall deployment status is "Success".

Set up the sample simulator (optional)

To find the simulator URL, sign in to your Azure subscription, and then click the App Service resource type under the newly created resource group. You'll see the URL is in the top right corner. Copy the URL and complete the following steps:

1. Paste the URL into your browser's address bar to load the page.
2. When the simulator page opens, click Configuration.
3. Enter the IoT hub host name and key. This information is in your Azure portal.
5. On the left under General, click Shared access policies to get the host name and primary key.
6. Make sure Connection status is marked as Connected and then close the dialog box.

Now you can send a test command by using the sample simulator. For example, click the temperature and increase it to above 70 degrees.

Register devices that you want to monitor in Dynamics 365

To monitor a device, you need to create and register an asset.

1. From the main menu click, Field Service > Customer Assets.
2. On the command bar click New.
3. Use the helpful tooltips to fill in information.
4. Connected Device Attributes: to register the device with the IoT hub, make sure you enter a Device ID.
5. When you're done, click SAVE and a record will be created.
6. On the command bar click, REGISTER DEVICES.
7. Click OK in the registration box that appears.
8. When the device is registered, it will appear as a registered asset. To verify the registration, from the main menu click Field Service > Registered Assets.

Set up a Power BI chart (optional)

Set up Power BI accounts and open the sample. pbix report.

1. Go to https://powerbi.microsoft.com and create a free Power BI account.
3. Sign in to Power BI Desktop with the Power BI user credentials (we recommend that this user is the same as the Dynamics 365 user).

4. Download and open the sample Power BI template.
The Power BI report will open with errors because it was created with a sample SQL database and user. Update the query with your SQL database and user, and then publish the report to Power BI.

**Update the query to point to your SQL database**

1. Click **Edit Queries**.
2. Click **Advanced Editor**.
3. Replace the source SQL database with the database provisioned in your Azure resource group.
4. Click **Close and Apply**.
   You can find your SQL server name in the SQL database in the Azure portal.
5. Add your IP address to the SQL server firewall to allow Power BI Desktop to connect to the SQL server.
6. Copy the IP address when you see this message.

![Refresh](image)

7. Go to the Azure portal, open the SQL server, and add your IP address to the firewall.

**Publish to your Power BI account**

1. Save your changes and publish.
2. Once you publish, Power BI Desktop will provide a link and message that instructs you to open the report and provide credentials.
3. Once the report is open, you’ll see notifications to edit your credentials.
4. Enter the SQL server admin user name and password to allow Power BI to access your database.
5. In the Power BI sidebar, open the report and pin these tiles to a dashboard. You can create a dashboard or pin to an existing one.
6. Save the dashboard, and then share it with any users who have permissions to see the dashboard and tiles.

7. In the top right corner of the dashboard, click **Share**, enter the users email address, and click the **Share** button.

**Pin the tile in Dynamics 365**

1. Open the device, alert, or asset form.

   ☑️ **Important**
   
   The device that is related to any of the open forms must have a device ID and be registered; otherwise, the PowerBI section will be hidden.

2. The first time you will need to specify the tile you want pinned. After that, the tile will load when you go to the page.
   a. Click the **Add** button.
   b. A configuration window displays. Sign in if prompted.
   c. Pick your dashboard and tile.
      - A preview of the tile will load; however, if you have not run the simulator for that device, there will be no data, as shown here.

3. Save the tile.

4. The config window closes, and the Power BI section reloads with the pinned tile.

5. The tile is filtered to the device ID of the current entity.

6. The next time you load any of the device, alert, or asset forms, the Power BI section will load the tile automatically, filtered to the current entity device ID (if there is a device ID and the device has been registered).

**Add devices to an asset**

If you have a device with more parts that you want to monitor, instead of creating separate asset records for each part, you can create one asset record and add the parts to it.

1. From the main menu click **Field Service > Registered Assets**.

2. From the list of existing assets, open the asset record that you want to add parts to.

3. To add parts, in the **Connected Devices** section, click the **See the records associated with this view** button.

4. Click **Connect**, and then click **To Another** or **To Me**.

5. Use the helpful tooltips to fill in the rest of the information and then click **Save**.

**Register multiple existing assets**

1. To register multiple assets at once, click **Field Service > Customer Assets**.
2. From the list of assets, select the assets that you want to register.
3. On the command bar, click **REGISTER DEVICES.**
4. Click **OK** in the registration dialog box that appears.
5. When the device is registered, it will show up as a registered asset. To verify the registration, from the main menu click **Field Service > Registered Assets.**

**Register an asset on the mobile app**

Before you can register assets on the mobile app, you will first need to install the mobile app. More information:  [Field Service Mobile App User’s Guide](#)

1. On your mobile device, open the mobile app.
2. Tap **Customer Assets**, and then tap the **Add** button.
3. Fill in the asset information and, then tap **Register Device.**

**Note**

You cannot associate an asset with a device using the mobile app.

**Registration error**

When a device does not register, you will see an error in the Registration Status field of the asset record. For assets with multiple devices, device status will show the error message for each device. This error may occur if Dynamics 365 is not connected to Azure or if Azure is offline.

**View a device's registration history**

1. From the main menu, click **Internet of Things > Registered Devices.**
2. Click an IoT device record to open it.
3. In the Category field, use the search button to find and to add the device to a category.

**Categorize devices**

You can also manage devices by categorizing them. For example, you can categorize devices by the commands they support, the type of device, or by devices that break down more often.

**Create a new IoT device category**

1. From the main menu, click **Internet of Things > Device Categories.**
2. On the command bar, click **New.**
3. Enter a **Name** for the device category.
4. Use the helpful tooltips to fill in information.
5. When you're done click **Save.**
6. Open the IoT device category record that you created.
7. In the Devices section, click **Add IoT Device record**, and then add a device to the category.

**Add devices to an existing category**
1. From the main menu click, **Internet of Things > Registered Devices**.
2. Click an IoT device record to open it.
3. In the **Category** field, use the search button to find and add the device to a category.

**View device readings**
Once a device is registered, you can open the record to view the readings sent by the device. For example, if you're monitoring a thermostat, your reading will show the thermostat temperature. By default, you can view the last 20 readings. You can change the default setting in the Power BI report by using Power BI Desktop.
1. To view a device reading, from the main menu, click **Field Service > Customer Asset**.
2. From the list of assets, choose an asset and open the record.
3. Refer to the **Connect Device Readings** section to view the device readings.

**Remotely send commands to a registered device**
When a device isn't working properly, the system receives an alert. To troubleshoot the issue remotely, you can send a command by choosing a registered device or by using an existing IoT alert.

- **Note**
When you receive multiple alerts from the same device, the alerts will be listed in hierarchical order. You can change the grouping by changing the IoT - Parent IoT Alerts workflow.

**Send commands from a registered asset**
1. From the main menu, click **Field Service > Registered Assets**.
2. From the list of assets, choose a registered asset or device.
3. On the command bar, click **CREATE COMMAND**.
4. Enter a **Name** for the command.
5. In the **MESSAGE TO SEND** box, copy and paste one of these supported commands:
   ```json
   {"CommandName": "Reset Thermostat", "Parameters": {}}
   {"CommandName": "Notification", "Parameters": {"Message": "Technician has been dispatched"}}
   {"CommandName": "Set Values", "Parameters": {"Reading": {"Temperature": "30", "Humidity": "30"}}} ```
Note

Before sending a command make sure there are no spaces or extra characters in the command.

6. On the command bar, click **SEND&CLOSE** to send the command.

**Respond to an alert**
1. Navigate to **Field Service > IoT Alerts**.
2. Choose an existing IoT alert record.
3. On the command bar, click **CREATE COMMAND**.
4. Enter a **Name** for the command.
5. In the **MESSAGE TO SEND** box, copy and paste one of the supported commands listed section above.
6. On the command bar, click **SEND&CLOSE** to send the command.

**View history of commands sent to a device**
1. From the main menu, click **Field Service > Customer Assets**.
2. From the list, choose an asset.
3. Scroll down to the **Command** section to view the history.

**Create business process flows to automatically handle incoming IoT alerts**

When you receive an alert from a device, your service team can manually monitor the alerts and troubleshoot the issue remotely. If the issue is not resolved by sending a remote command, the service rep can create a case or work order and dispatch a field tech. The provided business process flow guides you through the process of manually responding to IoT alerts.

List of default IoT actions:
- **IoT - Parent IoT Alerts** (Action)
- **IoT - Register Customer Entity** (Action)
- **IoT - Register Device** (Action)
- **IoT – Debounce IoT Alerts** (Action)
- **JSON-Based Field Value - Get Number** (Action)
- **JSON-Based Field Value - Get String** (Action)
- **JSON-Based Field Value - Get Boolean** (Action)
View the IoT dashboard
The default IoT dashboard provides data on registered devices and alerts.
1. From the main menu, click Field Service or Internet of Things.
2. Click Dashboard.
   - The first chart shows alerts that you can sort by clicking the IoT Alerts by menu.
   - The second chart shows alerts by time.
   - The third chart shows alerts along with the action taken to resolve the issue.

Privacy notice
By installing Connected Field Service for Microsoft Dynamics 365, when you provide your Azure subscription information, the required Azure resources (listed below) will be deployed and your Dynamics 365 (online) instance will send data (such as commands and registrations) to Azure to enable IoT–enabled scenarios that register devices and then send and receive commands to the registered devices. An administrator can uninstall Connected Field Service to remove the functionality and then navigate to the Azure portal to manage any related Azure services that are no longer needed. Azure components and services that are involved with Connected Field Service functionality are detailed in the following sections.

Note: For more information about additional Azure service offerings, see the Microsoft Azure Trust Center.

Service bus queue
This provides a queue for both inbound and outbound messages (commands) flowing between Dynamics 365 and Azure. When an IoT alert is sent to Dynamics 365, or a command is sent from Dynamics 365 to the IoT hub, it will be queued here.

Logic Apps
This provides an orchestration service that uses a Dynamics 365 connector and a Queue connector. Dynamics 365 connectors are used to construct entities that are specific to Dynamics 365 and Queue connectors are used for polling the queue.

Stream analytics
This provides a fully managed, real-time event processing engine that helps to unlock deep insights from data. Stream Analytics makes it easy to set up real-time analytic computations on data streaming from devices, sensors, web sites, social media, applications, infrastructure systems, and more. It is functioning as a funnel to send selective IoT alerts to Dynamics 365.

IoT Hub
Connected Field Services uses the IoT Hub to manage the state of registered devices and assets. In addition, the IoT Hub sends commands and notifications to connected devices—and tracks message delivery with acknowledgement receipts. Device messages are sent in a durable way to accommodate intermittently connected devices.

Simulator
This is a test web app to emulate the device that is sending commands or receiving commands from the IoT hub.

Azure SQL Database
Connected Field Service uses SQL Azure to store device heartbeat messages for later use by PowerBI to show the status of devices in Dynamics 365.
Configure default settings for Dynamics 365 for Field Service

Set default settings for work orders, bookings, schedule board settings, agreements, and more. For example, in the Other section, you may want to set Auto Geo Code Addresses to Yes. This will automatically geocode addresses.

To set default settings
1. From the main menu, click Field Service > Administration, and then choose Field Service Settings.
2. Fill in the information, as required. Click a tab to see information on settings.
3. When you're done, click Save.

Work Order / Booking

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Select default booking and work order options.</td>
</tr>
<tr>
<td>Work order prefix</td>
<td>Select a default prefix for all your work orders. The prefix will be added to the beginning of the work order number. This helps you easily identify work orders from other types of service requests in the system.</td>
</tr>
<tr>
<td>Default scheduled booking status</td>
<td>Determines the default booking status value for a new resource booking record. More information: Set up booking statuses (Field Service)</td>
</tr>
<tr>
<td>Default canceled booking status</td>
<td>Select a default booking status for canceled bookings. For example, Canceled. More information: Set up booking statuses (Field Service)</td>
</tr>
<tr>
<td>Default work order completed status</td>
<td>Select whether the default status for a completed work order is Completed or Posted. More information: Set up booking statuses (Field Service)</td>
</tr>
<tr>
<td>Default booking duration</td>
<td>Select a default booking duration. For example, when a new booking is created the default booking duration is 30 minutes.</td>
</tr>
<tr>
<td>Word order starting number</td>
<td>Select a starting number for your work order. For example, if you choose &quot;100&quot; then your first work order number will be 100.</td>
</tr>
<tr>
<td>Options</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>order number will be 100, and second one will be 101, and so on.</td>
<td></td>
</tr>
<tr>
<td>Work order invoice creation</td>
<td>Select whether the system should automatically generate a billing invoice for work orders when the status is set to <strong>Closed-Posted</strong>.</td>
</tr>
<tr>
<td>Travel charge item</td>
<td>Select what product is used in the system for travel charges for a work order. For example, when you have a booking with a journal type set to traveling, the system automatically creates a work order service with the duration of the journal for travel time. The pricing will be determined by the standard pricing rules. More information: <a href="...">Create a product or service (Field Service)</a></td>
</tr>
<tr>
<td>Default warehouse</td>
<td>Select the default warehouse that work order products will be taken from unless specified otherwise. More information: <a href="...">Create a warehouse (Field Service)</a></td>
</tr>
<tr>
<td>Deactivate work order / booking</td>
<td>Select when the system should automatically deactivate work orders and bookings.</td>
</tr>
<tr>
<td>Deactivate work order when posted</td>
<td>Select whether the system should deactivate a work order when the status is changed to <strong>Closed-Posted</strong>. More information: <a href="...">Set up work order sub-statuses (Field Service)</a></td>
</tr>
<tr>
<td>Deactivate work order when canceled</td>
<td>Select whether the system should deactivate a work order when the status is changed to <strong>Closed-Canceled</strong>. More information: <a href="...">Set up work order sub-statuses (Field Service)</a></td>
</tr>
<tr>
<td>Deactivate booking when completed</td>
<td>Select whether the system should deactivate a resource booking when the status is changed to <strong>Completed</strong>. More information: <a href="...">Set up booking statuses (Field Service)</a></td>
</tr>
<tr>
<td>Deactivate booking when canceled</td>
<td>Select whether the system should deactivate a resource booking when the status is changed to <strong>Canceled</strong>. More information: <a href="...">Set up booking statuses (Field Service)</a></td>
</tr>
<tr>
<td>Resource pay type</td>
<td>Choose from pay types that you have created in the system to calculate timestamp-based labor cost on booking journals when a booking is marked as complete. More information: <a href="...">Set up resource pay types (Field Service)</a></td>
</tr>
<tr>
<td>Options</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Work pay type</td>
<td>Select the pay type that will be used in conjunction with work performed during the resource’s normal work hours.</td>
</tr>
<tr>
<td>Business closure pay type</td>
<td>Select the pay type that will be applied on days that have been marked with <strong>Business Closures</strong>.</td>
</tr>
<tr>
<td>Travel pay type</td>
<td>Select the pay type that will be applied to time that the resource is traveling to a service location to perform service work.</td>
</tr>
<tr>
<td>Overtime pay type</td>
<td>Select the pay type that will be applied to time that is outside of the resource’s scheduled work hours.</td>
</tr>
<tr>
<td>Break pay type</td>
<td>Select the pay type that will be applied to time that the resource is on break while performing service work.</td>
</tr>
<tr>
<td>Schedule assistant</td>
<td>Choose default options for the schedule assistant.</td>
</tr>
<tr>
<td>Auto filter service territory</td>
<td>Select whether the schedule assistant should automatically filter search results based on the work order territory. More information: Set up territories (Field Service)</td>
</tr>
<tr>
<td>Default radius value</td>
<td>Select a default radius the schedule assistant will use when searching for resources for work orders. For example, if you choose a 20-mile radius, then the schedule assistant will find resources within 20 miles of the work order booking location.</td>
</tr>
<tr>
<td>Default radius unit</td>
<td>Select miles or kilometers.</td>
</tr>
<tr>
<td>Undefined booking location</td>
<td>This option applies to when you use the scheduling assistant for bookings that don’t have geocode coordinates.</td>
</tr>
<tr>
<td></td>
<td>If this option is set to <strong>Ignore location</strong>, then the new booking will have 0 minutes of estimated travel.</td>
</tr>
<tr>
<td></td>
<td>If it’s set to <strong>Last known location</strong>, then travel is added to the new booking, and is based on the last booking that had geocode coordinates. More information: Turn on auto geocoding (Field Service)</td>
</tr>
</tbody>
</table>
## Schedule board setting

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Board</strong></td>
<td>Select default options for the schedule board. More information: <a href="#">Configure the schedule board</a></td>
</tr>
<tr>
<td>Scheduler Field Service details view</td>
<td>Select the default view for the Details pane ion the schedule board for work orders.</td>
</tr>
<tr>
<td>Scheduler Field Service tool tip view</td>
<td>Select the default view for the tool tip displayed when you hover over a booking linked to a work order on the schedule board.</td>
</tr>
<tr>
<td>Scheduler Field Service slot text template</td>
<td>Enter HTML code to define the text and format that is displayed in the Field Service bookings on the schedule board.</td>
</tr>
<tr>
<td>Scheduler core slot text template</td>
<td>Enter HTML code to define the text that is displayed in bookings that are not linked to work orders on the schedule board.</td>
</tr>
<tr>
<td>Unscheduled work order view</td>
<td>Select the default view for the unscheduled work orders list pane on the schedule board.</td>
</tr>
<tr>
<td>Notifications time out (in sec)</td>
<td>Enter the default frequency, in seconds, at which the schedule board should auto-refresh.</td>
</tr>
<tr>
<td>Booking alert template</td>
<td>This is for the booking alert entity. You can have booking alerts that display information within the alert. You can modify the data shown here.</td>
</tr>
<tr>
<td>Scheduler core details view</td>
<td>This applies to bookings that are not linked to a work order. Select the default Details view on the schedule board for bookings that are not linked to work orders.</td>
</tr>
<tr>
<td>Scheduler core tool tips view</td>
<td>This applies to bookings that are not linked to a work order. Select the default tool tips view for bookings that are not linked to work orders.</td>
</tr>
<tr>
<td>Cancel current slots when moving</td>
<td>Select whether, when moving slots to another time, to leave the old slots and change their status to Cancel.</td>
</tr>
<tr>
<td><strong>Map view</strong></td>
<td>Select default options for the schedule board map view. More information: <a href="#">Configure the schedule board</a></td>
</tr>
<tr>
<td>Scheduler resource tool tip view</td>
<td>Select the default view to display information when you hover over the resource pin on the schedule board map view.</td>
</tr>
<tr>
<td>Scheduler business unit tool tip view</td>
<td>Select the default view to display information when you hover over the business unit pin on the schedule board map view.</td>
</tr>
<tr>
<td>Options</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Unscheduled WO tool tips view ID</td>
<td>Select the default view to display information when you hover over an unscheduled work order pin on the schedule board map view.</td>
</tr>
<tr>
<td>Scheduler Resource details view</td>
<td>Select the default view to display information in the details pane on the schedule board when you click a resource map pin.</td>
</tr>
<tr>
<td>Scheduler business unit details view</td>
<td>Select the default view to display information in the details pane on the schedule board when you click a business unit map pin.</td>
</tr>
<tr>
<td>Resources Synchronization timeout (in sec)</td>
<td>When using the Real-Time mode in the schedule assistant, the system searches the Mobile Audit table for the resource's current location, based on data from their mobile device. This setting determines how old the last known resource location, in the mobile audit table, can be, and still be used in the schedule assistant query.</td>
</tr>
</tbody>
</table>

### RMA

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RMA prefix</td>
<td>Select a default prefix for a return merchandise authorization (RMA). The prefix will be added to the beginning of the RMA number. This helps you easily identify an RMA from other types of service requests in the system. More information: Process a return (Field Service)</td>
</tr>
<tr>
<td>RMA starting number</td>
<td>Select a starting number for RMAs. For example, if you choose 1000 then your first RMA will be 1000, and the second one will be 1001, and so on. More information: Process a return (Field Service)</td>
</tr>
</tbody>
</table>

### RTV

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RTV prefix</td>
<td>Select a default prefix for a return to vendor (RTV). The prefix will be added to the beginning of the RTV number. This helps you easily identify an RTV from other types of service requests in the system. More information: Process a return (Field Service) and Create a return to vendor (Field Service)</td>
</tr>
</tbody>
</table>
### Options

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RTV starting number</td>
<td>Select a starting number for RTVs. For example, if you choose 2000, then your first RTV will be 2000, and second one will be 2001, and so on. More information:  <a href="https://example.com/process">Process a return (Field Service)</a> and <a href="https://example.com/create">Create a return to vendor (Field Service)</a></td>
</tr>
</tbody>
</table>

### Agreements

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agreement prefix</td>
<td>Select a default prefix for agreements. The prefix will be added to the beginning of the agreement number. This helps you easily identify agreements from other data in the system. More information:  <a href="https://example.com/customers">Set up customer agreements (Field Service)</a></td>
</tr>
<tr>
<td>Auto generate work order for agreement booking</td>
<td>Select whether the system should automatically generate work order bookings based on agreements. If set to No, then you will need to manually create the work order records by clicking the ribbon button on the Schedule Date record. More information:  <a href="https://example.com/customers">Set up customer agreements (Field Service)</a></td>
</tr>
<tr>
<td>Generate booking dates X months in advance</td>
<td>Field Service agreements generate booking dates based on the agreement booking setup recurrence schedule. These are the dates that the system will generate a work order record, if the auto generate work order is set to Yes. This setting determines how many months in advance the system will generate booking date records. More information:  <a href="https://example.com/customers">Set up customer agreements (Field Service)</a></td>
</tr>
<tr>
<td>Generate invoices dates X months in advance</td>
<td>Field Service agreements generate invoice dates based on the agreement invoice setup recurrence schedule. These are the dates that the system will generate an invoice record, if the auto generate invoice is set to Yes. This setting determines how many months in advance the system will generate invoice date records. More information:  <a href="https://example.com/customers">Set up customer agreements (Field Service)</a></td>
</tr>
<tr>
<td>Agreement starting number</td>
<td>Select a starting number for agreements. For example, if you choose 3000, then your first agreement will be 3000, and the second one will be 3001, and so on.</td>
</tr>
</tbody>
</table>
### Options

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generate agreement work order X days in advance</td>
<td>When auto generate work, orders are set to <strong>Yes</strong>, the system will generate work order records based on the recurrence schedule and the existing booking dates. This setting determines how many days in advance of the booking date to generate the work order record. More information: <a href="#">Set up customer agreements (Field Service)</a></td>
</tr>
<tr>
<td>Generate agreement invoices X days in advance</td>
<td>The system will generate invoice records based on the invoice recurrence schedule and the existing invoice dates. This setting determines how many days in advance of the invoice date to generate the invoice record. More information: <a href="#">Set up customer agreements (Field Service)</a></td>
</tr>
</tbody>
</table>

### Purchase

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase order prefix</td>
<td>Select a default prefix for purchase orders. The prefix will be added to the beginning of the purchase order number. This helps you easily identify purchase orders from other data in the system.</td>
</tr>
<tr>
<td>Purchase order approve required</td>
<td>Select if a purchase order needs an approval before the status can be changed to <strong>Submitted</strong>. More information: <a href="#">Create a purchase order (Field Service)</a></td>
</tr>
<tr>
<td>Purchase order starting number</td>
<td>Select a starting number for purchase orders. For example, if you choose 4000, then your first purchase order will be 4000, and second one will be 4001, and so on.</td>
</tr>
<tr>
<td>Use of product out of stock</td>
<td>Select how the system reacts when a work order product is used for a product that is not currently in stock. <strong>Confirm</strong> will prompt the user to decide whether to continue or not, and <strong>Restrict</strong> will keep the work order product from being used.</td>
</tr>
</tbody>
</table>

### Inventory

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory transfer prefix</td>
<td>Select a default prefix for inventory transfer numbers. The prefix will be added to the beginning of the inventory transfer number. This</td>
</tr>
<tr>
<td>Options</td>
<td>Description</td>
</tr>
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<td>----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Options</td>
<td>Description</td>
</tr>
<tr>
<td>Inventory adjustment prefix</td>
<td>Select a default prefix for inventory adjustment numbers. The prefix will be added to the beginning of the inventory adjustment number. This helps you easily identify an inventory adjustment from other data in the system.</td>
</tr>
<tr>
<td>inventory transfer starting number</td>
<td>Select a starting number for inventory transfer numbers. For example, if you choose 5000, then your first inventory transfer number will be 5000, and second one will be 5001, and so on.</td>
</tr>
<tr>
<td>inventory adjustment starting number</td>
<td>Select a starting number for inventory adjustment numbers. For example, if you choose 6000, then your first inventory adjustment number will be 6000, and second one will be 6001, and so on.</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Bing API key</td>
<td>The default key allows geocode and mapping functionality. If you need to use your own key, specify it here.</td>
</tr>
<tr>
<td>Entity number length</td>
<td>Enter the number of digits the entity numbers will be. For example, if you enter 5, the first work order number would be 00001.</td>
</tr>
<tr>
<td>Auto allocate estimate products</td>
<td>When products are added to a work order before the work begins, then the line status of the work order product record defaults to <strong>Estimate</strong>. This setting determines whether the work order product record is set to <strong>Allocated</strong> when the line status is still <strong>Estimated</strong>, as opposed to <strong>Used</strong>.</td>
</tr>
<tr>
<td>Auto geo code addresses</td>
<td>Specify whether the system should automatically add the appropriate latitude and longitude values based on the account’s address. More information: <strong>Turn on auto geocoding (Field Service)</strong></td>
</tr>
<tr>
<td>Product cost order</td>
<td>Select the order for product cost.</td>
</tr>
</tbody>
</table>

**GPS Data**

Field Service can be integrated with third-party GPS providers to allow the real-time location of resources or vehicles on schedule maps. These settings allow you to map the integrated GPS data to the Field Service system.
### Options

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom GPS data</td>
<td>Select whether the system will use a custom entity for its source of geo locations for resources to be displayed on the map view.</td>
</tr>
<tr>
<td>Custom GPS resource field</td>
<td>Shows the logical name of the resource to be used for geo locations.</td>
</tr>
<tr>
<td>Custom GPS latitude field</td>
<td>Shows the logical name of the latitude to be used for geo locations.</td>
</tr>
<tr>
<td>GPS location expires after X minutes</td>
<td>Enter when GPS location expires.</td>
</tr>
<tr>
<td>Custom GPS location entity</td>
<td>Shows the logical name of customer entity to use for geo locations.</td>
</tr>
<tr>
<td>Custom GPS timestamp field</td>
<td>Shows the logical name of the timestamp to use for geo locations.</td>
</tr>
<tr>
<td>Custom GPS longitude field</td>
<td>Show the logical name of the longitude to be used for geo locations.</td>
</tr>
</tbody>
</table>

### Notes

Use this area to add any notes for yourself.

---

## Turn on auto geocoding

With Field Service, it’s important to geocode each service account record with latitude and longitude values so that when you generate work orders for that service location, the work order inherits the coordinates and the system can calculate estimated travel time when attempting to schedule the work order to a resource.

When you turn on the auto geocode system setting, the system will attempt to automatically add the appropriate latitude and longitude values based on the account’s address.

### Important

To use the schedule board booking functionality, geocoding, and location services, you need to turn on maps.

1. From the main menu, click **Resource Scheduling > Administration**.
2. Click **Scheduling parameters**.
3. Open record and scroll down to the **Resource Scheduling Optimization** section.
4. On the **Connect to Maps** field choose **Yes**.
5. Accept terms and save the record.
Turn on automatic geocoding
1. From the main menu, click Field Service > Administration, and then choose Field Service Settings.
2. Under the Other section, go to Auto Geo Code Addresses, and then select Yes.
3. Click the Save button in the lower right corner.

Geocode the address on a work order
1. Open a work order.
2. Ensure the work order has an accurate address.
3. On the top command bar, click Geo Code.
4. On the map dialog box, make sure you have the correct address, and then click Change. More information: Create a work order (Field Service)

Geocode the address on an account record
1. Open an account record
2. Ensure the account has an accurate address.
3. To geocode the account address, on the top command bar, click the More Commands button, and then select Geo Code.
4. On the map dialog box, make sure you have the correct address, and then click Change.

Install the Field Service mobile app
Solve customer issues quickly with Field Service for Microsoft Dynamics 365 (mobile). You can dispatch, route, and complete work orders, manage invoices, and more with the mobile app.
Field Service - Dynamics 365 (mobile) is a solution built on the Resco Mobile Dynamics 365 platform. More information: http://www.resco.net/mobilecrm/support.aspx
To customize Field Service - Dynamics 365 (mobile), you need to install the Resco Mobile Dynamics 365 Woodford solution. This lets you configure mobile behavior around your business needs. If you don’t need to customize the app just yet, you can use the default field service mobile configuration.
Before you can start configuring Field Service - Dynamics 365 (mobile) beyond what is shipped out of the box from the app store, your Dynamics 365 admin will need to install the Woodford mobile solution for your Dynamics 365 (online) account.
Step 1: Download and install the Resco Mobile Dynamics 365 Woodford mobile solution

You need administrator permissions to install the Mobile Dynamics 365 Woodford mobile solution for field service capabilities in Dynamics 365. You also need to use Internet Explorer with Silverlight or Firefox.

1. Download and save the Woodford mobile solution from the Resco site to your computer.
2. To perform the next steps, sign in to your Dynamics 365 account. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.
3. From the main menu, click Settings > Solutions.

4. On the All Solutions page, click Import.

5. In the Import Solution dialog box, click Browse, and then choose the Woodford file you downloaded in Step 1.
6. Click **Next** to start the import. When the import is complete, click **Close**. You should see **Woodford** listed on the **All Solutions** page.

7. To publish the Woodford solution, click **Publish All Customizations**, and then refresh the page.
8. You should now see the **Woodford** solution listed on the **Settings** menu. To verify this, go to **Settings**, and then click **Woodford**.

**Important**

If you don't see **Woodford** under the **Settings** menu, refresh the page.

9. In the **Increase Quota** dialog box, set the quota to 100MB, and then click **OK**.

10. In the **Register User** dialog box, enter your user information, and then click **Register**.

11. In the **Update available** dialog box, when you're prompted about an available update, click **Later**.
You have now installed the solution.

**Step 2: Import the field service mobile project template into the Woodford solution**

After the Woodford solution is installed, you'll need to download a template that will help you configure the mobile app. The template is required if you are using the Woodford solution.

**Note**

For the mobile app for field service capabilities for Microsoft Dynamics 365 to work, the Woodford solution and Woodford template are required. See the steps below to download and install the Woodford template.

The template contains all customizations for the field service mobile app. You can use it to add, remove, and change fields, entities, views, and forms.

1. Download and save the template file.
   - If you are on December 2016 update for Microsoft Dynamics 365 (online), use this mobile project template
   - If you are on Microsoft Dynamics CRM Online 2016 Update 1, use this mobile project template

2. In Dynamics 365, go to **Settings > Woodford**, and then click **MobileCRM Woodford**.

3. Click **Import**, and then import the mobile project template file that you saved in Step 1.

4. In the **Add Mobile Project dialog** box do this:
   a. For **Type**, select **Standard User**.
   b. **Name** the template.
   c. Set the **Priority**.
Note

A user who signs in to the mobile app will see the customizations for the project that is assigned to their security role. If a user has more than one security role for which there is a project assigned, then the project with the highest priority will download to the user's device.

d. For Roles, select the roles you want this mobile template to apply to, and then click OK. A user who signs in and has a role that matches the role you select here, will inherit this configuration on their mobile app.

5. To publish the template file, on the Mobile Project tab, click Edit.
Note

Change the published version to match the version of the app you have installed. To see which version of the mobile app you have installed, open your mobile app and from the home screen, and then tap About.

Make sure to match the first two numbers of the mobile app that you have installed to the published version in the project. If the number of the published version of the project is greater than the app version, you see an error about unsupported metadata when you try to sync. The version only needs to match the first decimal.

6. On the next screen, click Publish All.

Next, install the app on your mobile device. More information: Field Service Mobile App User’s Guide

Privacy notice

By enabling the Field Service for Microsoft Dynamics 365 mobile app on a mobile device with location features enabled, real-time location data will be sent to Bing Maps and stored in Dynamics 365. Users are prompted to provide permission for the flow of real-time location data during installation or use of the field service mobile app. To disable the flow of real-time location data from the device, the user must disable the device’s location features or uninstall the application.

The real-time location data sent by the field service mobile app is used to support the following scenarios:

- To show the location of a user’s customers. Data about the user’s current location is passed to the mapping provider as context for the map rendered by the provider and displayed within field service mobile app.
- To create and update a user’s schedule. Data about the user’s current location is passed to the field service capabilities in Dynamics 365 to create and update a user’s schedule. For example, to assign a task to the nearest technician.

In addition, by enabling the field service mobile app on a mobile device, mobile app usage information, such as application errors, will be sent to Microsoft through a secure connection to Organization Insights and stored in Azure Table Storage.
Note: Organization Insights provides the system administrator of a Dynamics 365 organization with a quick overview of how the org is being used. The system administrator can view most active users, the number of SDK requests being initiated, and the number of being viewed by SDK users.

A list of the Azure components and services that are involved with Help Improve Unified Service Desk functionality is provided below.

Note: For more information about additional Azure service offerings, see the Microsoft Azure Trust Center.

Cloud Services
OrgInsights Data REST API (Web Role)
This web role accepts requests from the charts that display data in Organization Insights. The API reads aggregated data from the Azure Tables and returns it.

Azure Blob Storage
The Monitoring Agent (which runs on every scale group computer) collects the Dynamics 365 organization's raw telemetry data and uploads it in Bond Format (Binary format) to Azure Blob Storage.

Azure Table Storage
Raw telemetry data in Azure Blob Storage is aggregated and stored in Azure Table Storage, which is read by the Cloud Service.

Azure Active Directory
Organization Insights uses Azure Active Directory Service to authenticate web services.

Azure Service Bus
The Monitoring Agent creates and queues messages whenever it uploads data to Azure Blob Storage. The CMA pipe picks up these messages to aggregate the uploaded data.

Schedule multiple booking requirements on a recurring basis

Use Resource Scheduling Optimization for Microsoft Dynamics 365 to automatically set up the system to schedule multiple booking requirements on a recurring basis.
The Resource Scheduling Optimization solution minimizes overall travel time and makes efficient use of all schedulable resources. It takes many constraints into account, such as resource availability, skills required, priority, duration, and time windows to optimize the schedule.

For example, if you are using Microsoft Dynamics 365 for Field Service you can setup a schedule to automatically schedule work orders.
In Microsoft Dynamics 365 for Project Service Automation, you can set up the system to automatically schedule resources for projects.
If you have enabled the Common Scheduling Solution for other entities such as cases, opportunities, or leads, you can also use Resource Scheduling Optimization to automatically schedule time to work on those. More information: Schedule anything in Dynamics 365
Note
This feature is supported in December 2016 Update for Microsoft Dynamics 365 (online). Interested in getting this feature? Find your Dynamics 365 administrator or support person

Prerequisites:
Before you install Resource Scheduling Optimization for Microsoft Dynamics 365, you need to have one of these apps installed:
- Microsoft Dynamics 365 for Field Service. More information: Install Microsoft Dynamics 365 for Field Service
- Microsoft Dynamics 365 for Project Service Automation.

Install
To use this feature, first you need to install Resource Scheduling Optimization for Microsoft Dynamics 365.
1. Sign in to https://portal.office.com with your Global administrator or Dynamics 365 System Administrator credentials.
2. Click Admin centers > Dynamics 365.
3. Click the Instances tab, and then select the instance to add the solution to.
4. Click Solutions.
5. Select the Resource Scheduling Optimization solution and then click Install.
6. Proceed through Terms of service to accept the terms.
The status for the solution changes to Installation pending.
The status for the solution will change to Installed when the solution is ready.

Enable Resource Scheduling Optimization
To use Resource Scheduling Optimization, your user profile needs to have the Resource Scheduling Optimization security role.
1. From the main menu, click Resource Scheduling > Administration.
2. Click Scheduling parameters.
3. Open record and scroll down to the Resource Scheduling Optimization section.
5. Accept terms and save the record.

Note
To use the schedule board booking functionality, geocoding, and location services, you need to turn on maps. On the Connect to Maps field, choose Yes and accepts terms.
Set up the system to automatically schedule multiple activities

1. From the main menu, click **Resources Scheduling > Resource Scheduling Optimization Administration**.
2. On the command bar, click **New**.
3. **Name**: Enter a name.
4. **Scope**: Define what the Resource Scheduling Optimization should optimize:
   a. Click **Select a value** to select an existing scope. Or, click **New** to create a new scope:
      i. **Name**: Enter a name.
      ii. **Resource Requirement State**: Select which resource requirement should be selected based on their current state. Choose **Only Scheduled or Schedule** or **Unscheduled**.
      iii. **Range Reference**: The starting time to be used for all subsequent work order calculations. Choose **Job current time** or **Beginning of the Job's current day**.
      iv. **Range Duration (days)**: Amount of days added to the range reference.
      v. Click **Save & Close**.
5. **Goal**: Define how bookings should be optimized.
   a. Click **Select a value** to select an existing scope. Or, click **New** to create a new goal:
      i. **Name**: Enter a name.
      ii. **Engine Effort Level**: Choose how much effort Resource Scheduling Optimization should make to find the best auto scheduling option.
      iii. Choose **Constraints**:
         - **Schedule Within working hours**: Verifies that the task is not scheduled outside of the resource's working hours.
         - **Meets Required Characteristics**: Verifies the resource meets all the required skills needed to complete the work.
         - **Locked to Resource**: If marked, Resource Scheduling Optimization will not change any locked resources in the booking requirement.
         - **Scheduling Windows**: If marked, Resource Scheduling Optimization will not change any locked scheduling windows in the booking requirement.
         - **Restricted Resources**: If marked, Resource Scheduling Optimization will check resource preference to see if it's "restricted". If the requirement has a restricted resource in which there is no expiration, or expiration in the past, Resource Scheduling Optimization will not schedule this resource for this booking requirement.
      iv. Choose **Objectives**:
         - **Locked Booking**: The system will try to schedule the scenario that successfully creates/assigns the most "Locked" schedules to appropriate resources.
         - **High Priority Requirements**: The system will evaluate this objective, and give priority to the booking requirements with the highest priority.
- **Maximize Total Working Hours**: The system will choose the results, and the resource with the highest aggregate work time will win this objective.

- **Minimize total travel time**: The system will choose the results, and the resource with the lowest aggregate travel time will win this objective.

v. Click **Save & Close**.

6. **Schedule**: Choose when Resource Scheduling Optimization will run:
   a. **Timer**: Define how often this schedule will run.
   b. **Timer Mode**: The instant when the schedule will start the timer. Choose **Fixed** or **After Job Completion**.
   c. **Valid From and Valid To**: The first/last date and time when this schedule will be valid for execution.

7. Click to expand the **Filter** menu. Specify when the engine should run, by months, days of month, days of week, hours and/or minutes.

- **Note**

  If you leave all the filter options empty this means, there are no filters to apply. The system will run using all the options.

8. Click **Save**.

9. Click **Publish**.

10. Click **OK**.

**Privacy notice**

By enabling Resource Schedule Optimization, information, including schedule configuration information and work order details (location-relevant address information, such as account address and resource address) will be sent from Dynamics 365 to Bing Maps to allow for:

- Determining the geo location (latitude, longitude) of a specific address.
- Calculating the distance and travel time between locations.

Bing Maps then returns the information to Dynamics 365. An administrator can subsequently disable Resource Schedule Optimization to prevent address information from being sent to Bing Maps.

**Schedule anything in Dynamics 365**

Schedule anything in Dynamics 365 using the Common Scheduling Solution. You can enable scheduling for any entity including custom entities.

For example, you can enable scheduling for the opportunity form and schedule marketing visits for your opportunities. You can also do this for the case form and schedule time to work on cases.
For organization that use Microsoft Dynamics 365 for Field Service you’ll see a new integrated scheduling experience. For organization that use Microsoft Dynamics 365 for Project Service Automation you’ll have a new improved scheduling experience.

Important

To use the Common Scheduling Solution, you will need to have either Field Service or Project Service Automation.

Note

This feature is supported in December 2016 Update for Microsoft Dynamics 365 (online). Interested in getting this feature? Find your Dynamics 365 administrator or support person

Enable scheduling for an entity

When scheduling is enabled for an entity, the system creates a resource requirement record for the entity. This way, when you create a resource requirement, the system automatically checks which entity the resource requirement is for.

1. From the main menu, click Resources Scheduling > Administration.
2. Click Enable Resource Scheduling for Entities.
3. On the Setup Wizard - Enable Scheduling, click Add Entity and select the entity that you want to enable scheduling for.
4. Click Booking Relationship and select Create New Relationship.
5. Click Requirement Relationship and select Create New Relationship.

Note

If you already have relationships created, then you can select from an existing relationship.

6. Click Publish Customization.
7. On the BOOKING SETUP METADATA: INFORMATION form, use the tooltips to edit the default opens.

Note

To update the Booking Status Field Logical Name, you will first need to customize the system to add additional statuses. More information: Customize your Dynamics 365 system

In attribute settings sections field, can be mapped from entity that was enabled for scheduling to fields on booking requirement. For example, from Date, to Date, Territory, Duration and others.

8. When you’re done, click Save on the lower right corner.
Edit or turn off scheduling for an entity
1. From the main menu, click **Resources Scheduling > Administration > Enable Schedulable for Entities**.
2. From the list of **Enable Entities**, double click on the entity that you want to edit.
3. When the **BOOKING SETUP METADATA: INFORMATION** form opens, do one of the following:
   - To turn off scheduling for the entity, on the command bar, click **DEACTIVATE**. On the **Confirm Deactivation** dialog box, click **Deactivate**.
   - Edit the form and when you’re done, click **Save** on the lower right corner.

Schedule something
**Step 1: Create a resource requirement**
1. From the main menu, click **Sales, Service, or Marketing**.
2. Choose an entity that has scheduling turned on. For example, let’s say it’s turn on for the **Leads** entity. In this case, from the main menu you would choose **Marketing > Leads**.
3. From the list choose an existing lead.
4. On the leads form, sub-grid menu, click **Resource Requirement**.
5. Under the **Resource Requirement Associated View**, click **New**
6. On the **Resource Requirement** form, use the tooltips to fill in the information required.
7. When you’re done, click **Save**.
   A plugin runs and checks the relationships and automatically sets the booking setup metadata relationship appropriately.

**Step 2: Schedule the booking requirement**
To learn more about the schedule board, **Configure the schedule board**.
1. From the main menu, click **Resource Scheduling > Schedule Board**.
2. There are a few different ways to schedule a booking requirement:
   - Right click on an unscheduled booking and find available resources.
     i. From the **Booking Requirement** list, right click on an unscheduled booking and choose one of the following:
        1. Choose **Find availability - Current Resources** to find available resource from the list of resources on the schedule board.
        2. Choose **Find availability - Current Resources**, to find available resource from resources in the system.

**Note**
When you do this, the filters will show the options for the selected booking requirement.
3. When you see the available slot right click on the time slot on the schedule board and choose Book Here. Or, drag and drop the booking requirement to the available time slot.

- Drag an unscheduled booking requirement from list view to the schedule board.
  i. Select an unscheduled booking requirement from the list at the bottom.
  ii. Drag the item to an available resource/time slot on the schedule board.
- Schedule a booking requirement form the entity form
  i. From the main menu, click Sales, Service, or Marketing.
  ii. Choose and entity that as scheduling turned on. For example, let's say it's turn on for the Leads entity. In this case, from the main menu you would choose Marketing > Leads.
  iii. On the command bar, click Book.
  iv. Use the schedule board to book the booking requirement.

Set up bookable resources

A resource is anything that needs to be scheduled. This can be users, crews, service centers, company assets (equipment), accounts, or contacts.

Create a bookable resource

1. From the main menu, click Field Service > Administration, and then choose Bookable Resources.
2. On the Active Bookable Resources screen, click New.
3. Choose a Resource Type:
   - Account or Contact: Resources that aren't directly a part of your organization, but that you subcontract to.
   - User: The resource is a member of your organization.
   - Company Asset: Equipment.
   - Service Center: Where shop repairs are made.
   - Crew: Any collection of resources, for example, two or more workers, or a group.
4. Choose a Time Zone.
5. Type an Hour Rate. This is the hourly pay that the resource should be paid by the company.
6. Choose the Start Location and the End Location to specify which location the resource will be at when starting and ending work.
7. Choose if the resource should be displayed on the schedule board and schedule assistant.
8. Set **Enable Drip Scheduling** to **Yes** or **No**. This controls how many schedules will appear on the mobile app. If drip scheduling is disabled, all schedules will appear, based on your mobile settings.

9. Choose if time off needs to be approved or not.

10. Click **Save**.

11. In the **Characteristics** section, click **Add Bookable Resource Characteristics record** to add characteristics. More information: [Set up characteristics (Field Service)](https://example.com)

## Add work hours

1. Once the resource has been created, at the top, click the arrow next to the resource name, and then click **Work Hours**.

2. Click the **Set-Up** drop-down list and choose one of the following:
   - **New Weekly Schedule**: Set an ongoing weekly schedule for the resource.
   - **Work Schedule for One Day**: Set the hours the resource can be scheduled for on a day.
   - **Time Off**: Set the dates and times the resources can't work.

## Add characteristics

1. From the resource name submenu, click **Bookable Resource Characteristics**.

2. Click **Add New Bookable Resource Characteristics**.

3. Use the tooltips to help fill in information, and then click **Save**. More information: [Set up characteristics (Field Service)](https://example.com)

## Add resource territories

1. From the resource name submenu, click **Resource Territories**.

2. Click **Add New Resource Territory**. More information: [Set up territories (Field Service)](https://example.com)

3. Use the tooltips to help fill in your information, and then click **Save & Close**.

## Set up bookable resource categories

Bookable resource categories let you group your bookable resources by type. For example, you can create categories like technician, supervisor, subcontractor, vehicle, or equipment.

1. From the main menu, click **Field Service > Administration**, and then choose **Bookable Resource Categories**.

2. On the **Active Resource Categories** screen, click **+New** in the upper left corner.

3. Use the tooltips to help fill in your information, and then click **Save**.
Set up resource pay types

Resource pay types can be used to track your company’s costs associated with a resource booking. When the status of a resource booking record is set to “complete,” the system generates booking journal records, according to the time that a field agent spent performing the work.

The system can create one booking journal record for each of the following journal types: travel, working hours, break, overtime, and business closure, depending on the various resource booking statuses that the user applied to the resource booking while completing the work.

To set up this functionality, create one resource pay type record for each journal type, and then assign the resource pay types that you created in the Resource Pay Types section of the Field Service Settings page.

Create a new resource pay type

1. From the main menu, click Field Service > Administration, and then choose Resource Pay Types.
2. On the Active Resource Pay Types screen, click +New in the upper left corner.
3. Name the pay type.
4. Assign an Hourly Markup percentage.

The Hourly Markup field will be applied to the hourly rate amount specified on the resource record when determining the costs associated with the resource booking. For example, if you create a pay type called “Overtime” and assign it an hourly markup percentage of 150%, and then associate it with the Overtime Pay Type in Field Service settings, when the system creates a booking journal for overtime, it will set the cost at 150% of the hourly rate of the resource who performed the work.

Assign pay type scenarios

1. From the main menu, click Field Service > Administration, and then choose Field Service Settings.
2. In the Resource Pay Type section, assign the resource pay types that you created to the various journal types, and then click the Save button in the lower left corner.

Booking journals will be created to calculate the cost of a resource booking, for each of the journal types, according to the following logic:

- **Work**: Time the resource booking status is in progress while the resource is within their scheduled work hours.
- **Overtime**: Any time recorded outside a resource’s normal working hours.
- **Travel**: Time the resource booking status is “traveling.”
  - **Break**: Time the resource booking status is “on break.”
- **Business Closure**: Any time recorded by a resource when the company is closed.
Set up characteristics

Characteristics are skills that resources possess. For example, they can be used to indicate a license or certification is needed for certain types of work.

Adding characteristics to work orders allows you to document which knowledge or expertise is needed by a resource to complete the job, and to filter the list of available resources to those that have the matching characteristics when scheduling the work order.

Add characteristics
1. From the main menu, click Field Service > Administration, and then choose Characteristics.
2. On the Active Characteristics screen, click +New in the upper left corner.
3. Use the tooltips to help fill in your information and then click Save.

Assign characteristics to resources
1. From the main menu, click Field Service > Administration, and then choose Bookable Resources. This will take you to the Active Bookable Resources screen, where you will find a list of all available resources in the system.
   Note: More information: Set up bookable resources (Field Service)
2. From the list, click a bookable resource name.
3. Go to the Characteristics section, and on the left, click +Add Bookable Resource Characteristics record.
4. This will open a pop-up window where you can find and select the required Characteristics and add a Rating Value for the resource.
5. Click Save & Close.

Assign characteristics to work orders
1. Open a work order. More information: Create a work order (Field Service)
2. From the top bar, click the drop-down arrow next to the work order number, and then click Characteristics.
3. On the Work Order Characteristics Associated View screen, click +Add new Work Order Characteristics to this record.
4. This will open a pop-up window where you can find and select the required Characteristics and add a Rating Value.
5. Click Save & Close.
Set up booking statuses

Booking statuses allow you to create multiple sub-statuses mapped to each of your booking statuses to more precisely define your company’s unique business processes.

1. From the main menu, click Field Service > Administration, and then choose Active Booking Statuses.
2. Click +New on the Active Booking Statuses screen.
3. Use the tooltips to help fill in your information.
   - Choose a custom Status Color value to specify which color the resource schedule time slot will be displayed on the schedule board.
   - Map the sub-status to a parent status by selecting a value in the Field Service Status field.

Note: You can also set a default status for scheduled and canceled bookings in the General section in the Field Service Setting. For more information: Configure default settings for Dynamics 365 for Field Service

Set up booking rules

Booking rules allow a System Administrator to create warning or error messages that users see when creating or editing a resource booking record, based on custom conditions. For example, a booking rule could be created to warn a user when they attempt to book a work order to a resource on the schedule board that doesn't have the skills required for the job.

Set up booking rules to validate a booking when it is created or modified.

1. From the main menu, click Field Service > Administration, and then choose Booking Rules.
2. On the Active Booking Rules screen, click +New in the upper left corner.
3. Type a Name for the new booking rule.
4. Select a Web Resource that has been previously created by the System Administrator to contain the validation logic and warning text.
5. Enter the Method Name.
6. Click Save.

Set up territories

Territories are used to divide large service areas. If a service territory is assigned to a service account record, and a work order is generated for that service account, then the work order will inherit the service territory from the service account. When you are scheduling a work, order using the scheduling assistant, the suggested available resources can be filtered based on the resources that are assigned to the same territory as the work order. Using territories also helps dispatchers manage the schedules more efficiently when managing the schedule board.
To assign a territory to a resource, you will need to add the resource to a territory. More information: Set up bookable resources (Field Service)

Create a territory
1. From the main menu, click Field Services > Administration, and then choose Territories.
2. On the All Territories screen, click +New in the upper left corner.
3. Fill in your information:
   - **Name**: Enter the geographical name for the territory, such as the name of a city, country/region, or a state.
   - **Manager**: Enter the name of the user who manages this territory. This person typically assigns leads to salespeople.
     Important: You can't allocate the same user to multiple territories. If you need to assign a user to a large area (more than one existing territory), create a new territory that includes the existing territories, and then assign the user to that new territory.
   - **Description**: Enter any details that you'd like to include for this territory; for example, “Sales territory created for education and training”.
4. When you're done, on the command bar, click Save or Save & Close.

Assign members to territories
1. To assign members to a sales territory, open the territory and then, in the left pane, under Common, choose Members.
2. At the top of Users, click Add Members.
3. In the Look Up Records dialog box, select a user, and then click Add.

Set up postal codes
Creating postal code records and relating them to service territories lets an account be automatically assigned to a service territory when the account address is entered. When a user tabs out of the postal code field on the account record form, the system automatically populates the service territory field if it finds a match to the postal code.
Postal codes can be assigned to territories, but it is not necessary for the territories feature to work.

You can't have the same postal code assigned to multiple territories.

1. From the main menu, click Field Service > Administration, and then choose Postal Codes.
2. On the **Postal Codes** screen, click **New** in the upper left corner.
   Use the tooltips to help fill in your information, and then click **Save**.

### Configure incident types

Incident types act as service templates and allow users to quickly create work orders for the most common types of jobs that your company performs, including all of the necessary service tasks, products, services, required skills, and estimated work order duration.

1. From the main menu, click **Field Service > Administration**, and then choose **Incident Type**.
2. On the **Incident Type** screen, click **New** in the upper left corner.
3. Name the incident type using the **Name** field.
4. Use the **Description** field to add additional text describing the incident.
5. Fill in the **Estimated Duration** for the length of the job.

**Note**

Estimate Duration is set based on the total duration of all the service tasks on the incidents. The only way to set the duration manually on the incident is if the service tasks has no duration.

6. Click **Save**.
7. In the **Service Tasks** section, click **Add Incident Type Service Task record** to add a service task.
8. In the **Product** section, click **Add Incident Type Product record** to add a product. More information: [Create a product or service (Field Service)]
9. In the **Service** section, click **Add Incident Type Service record** to add a service. More information: [Create a product or service (Field Service)]
10. In the **Notes** section, add any additional notes.

### Set priorities

Priority records let you prioritize your work orders. You can also assign each priority value a custom color, which will display in the outline of the resource booking time slot on the schedule board. This allows dispatchers to visually distinguish a job’s priority while managing the schedule.

1. From the main menu, click **Field Service > Administration**, and then choose **Priorities**.
2. On the **Active Priorities** screen, click **New** in the upper left corner.
3. Use the tooltips to help fill in your information, and then click **Save**.
Create work order types

A work order type helps you categorize and build different types of work orders, such as installation, preventative maintenance, repair, sales, quote, and so on. When you create a work order type, it also helps separate work order information into views, reports, and dashboards on the schedule board.

1. From the main menu, click Field Service > Administration, and then choose Work Order Types.
2. On the Active Work Order Types screen, click New in the upper left corner.
3. Use the tooltips to help fill in information, and then click Save & Close.

Set up work order sub-statuses

Work order records progress through their lifecycle using system status values of:

- Open - Unscheduled
- Open - Scheduled
- Open - In Progress
- Open - Completed
- Closed - Posted
- Closed - Canceled

Work order system status values can't be modified in the system; however, to allow your company to create custom status values, you can create one or more sub-status values associated with each system status. This lets you map work order statuses to your unique business processes more precisely.

1. From the main menu, click Field Service > Administration, and then choose Work Order Sub-Statuses.
2. On the Active Work Order Sub-Statuses screen, click +New in the upper left corner.
3. Use the tooltips to help fill in your information, and then click Save.

Set up service task types

Service task types are used to define the "types" of service tasks that you will include in your incident types and work orders, and are performed by the field agent at the service location. Service tasks can be assigned a duration that rolls up to the work order duration.

Service tasks are used to create process steps, or checklists, for the field agent to follow when completing a work order, and can be added manually or by associating incident types with each work order.

Creating numerous service tasks is a good way of guiding a field agent through the work order process. For example, in a work order that calls for replacing the compressor of a refrigerator, a service task type list can show five important steps in the processes. The field agent can then mark each task as it is completed.
1. From the main menu, click **Field Service > Administration**, and then choose **Service Task Type**.
2. On the **Service Task Type** screen, click **+New** in the upper left corner.
   Assign the task an **Estimated Duration**.
3. Use the **Description** field to add additional text describing the task.
4. Click **Save**.
5. In the **Notes** section, enter any additional notes regarding the task.

### Set up time groups

Specify time groups consisting of multiple time windows to be used for scheduling. The schedule assistant will add the time group start and end times to the search results. This lets a user group the results by time group.

Time groups are saved based on the time zone of the user who creates the time group record. If your organization has users in different time zones (for example PST and EST) and you create time groups such as:

- 9 AM to 12 PM
- 12 PM to 5 PM

Then make sure to create these time groups for each time zone since time groups are time zone sensitive.

1. From the main menu, click **Field Service > Administration**, and then choose **Time Groups**.
2. On the **Active Time Groups** screen, click **+New** in the upper left corner.
3. Use the tooltips to help fill in your information, and then click **Save**.
   - Specify the top time group results that will display in the schedule assistant. For example, if you have 5 set then the top 5 results will show for the specified time block. Top is determined by least amount of travel time. If set to 0 (zero), then all results will be displayed.
   - Set **Hide Booking Time on Schedule Assistant** to **Yes** or **No**. If set to No, then these fields will be hidden from the schedule assistant results: start time, estimated time of arrival, and end time.
4. In the **Details** section, click **+Add Time Group Detail record**.
   - Name the group and set a start and end time.
   - Click **Save & Close**.

### Create a product or service

The **Product** entity contains information about products that may be sold to customers. Typical information stored in this entity are model number, manufacturer, warranty information, price, cost, etc. Products are usually added to work orders when an incident is added. Products added to a work order initially have a status of "estimated" and can be marked as "used," indicating that they were sold and billed to a client.
1. From the main menu, click **Field Service > Administration**, and then choose **Product**.

2. Click **Add Product**.

3. Fill in your information:
   - **Unit Group**: Select a unit group. A unit group is a collection of various units a product is sold in, and defines how individual items are grouped into larger quantities. For example, if you're adding seeds as a product, you may have created a unit group called "Seeds", and defined its primary unit as "packet".
   - **Unit**: Select the most common unit in which the product will be sold. Units are the quantities or measurements that you sell your products in. For example, if you've added seeds as a product, you can sell them in packets, boxes, or pallets. Each of these becomes a unit of the product. If seeds are mostly sold in packets, select packets as the unit.

   **Note**: The **Valid From** and **Valid To** fields define how long a product is valid for. There’s no business logic associated with these fields, except that the **Valid To** date must be later than the **Valid From** date. If required, you can implement your own business logic in these fields with a workflow, plug-in, or by using the Microsoft Dynamics 365 SDK. For example, run a scheduled job to automatically retire last season's products using the date selected in the **Valid To** field.

4. Click **Save**.

5. In the **Product Properties** section, click **+Add Properties Record**, and then select a related product.

6. In the **Additional Details** section, click **+Add Price List Item record**, and then create a price list item for each unit the product is available in.

7. In the **Product Relationships** section, click **+Add Product Relationship record**, and then select a related product.

8. In the **Field Service** section, fill in your information to define if what you are creating is a product or a service:
   - **Field Service product type**
     - **Inventory**: This option is used for products of high value, or products that are inventoried and have quantities tracked in a warehouse.
     - **Non-inventory**: This option is used for low-value items that are typically not inventoried. Examples of this are consumables like stickers or zip ties.
     - **Service**: The service option is used to create service products, which is the labor that you sell to your customers. The quantity of service products is measured with a duration of time. Only service products can be associated with a work order as a service.
   - **UPC code**: Set up a UPC code. This is often used as the barcode value for the product, so when mobile users scan the matching barcode, the product is found.
   - **Default vendor**: Enter a vendor.
   - **Taxable**: Choose whether the product or service is taxable.

9. Click **Save**.
10. After you're done adding all the details, review everything to ensure that it is correct. On the command bar, click **Preview**. The **Properties Preview** dialog box lets you verify how the product properties will appear to sales agents when they're selling the product or bundle. After you're done verifying everything, click **Done**.

**Create a price list**

Price lists define pricing levels. When you use a price list, you can specify how much a customer is charged for your product and services. The price list is noted on the account, work order, agreement, or the individual product or service.

**Create a new price list**

1. From the top menu, click **Field Service > Administration**, and then choose **Price Lists**.
2. On the **Active Price Lists** screen, click **+New** in the upper left corner.
3. Use the tooltips to help fill in your information, and then click **Save**.

**Add Field Service price list items**

Field Service price list items let you associate service (or labor) type products from the product catalog with a price list, with properties that are relevant to labor products.

1. From the top menu, click the drop-down arrow next to the price list name that you created, and then click **Field Service Price List Item**.
2. Click **Add New Field Service Price List Item**.
3. Use the tooltips to help fill in your information:
   - Name the price list
   - Select the Product/Service this applies to from the drop-down list.
     If this price list item is a service, you can:
     - Select **Duration Round To**
     - Select **Duration Rounding Policy**
     - Choose **Yes** or **No** for **Flat Fee**
     - Choose **Minimum Charge Amount**
     - Choose **Minimum Charge Duration**
4. Click **Save & Close**.

**Add price list items**

Create a price list item for each unit in which the product is available. For example, if the product is available as a single item (each), in a dozen, and in a gross, create three price list items. This lets you
order the product in any quantity you want, using the same price list. You can add price list items from the product form also.

1. In the price list record, in the **Price List Items** section, click the **Add Price List Item record**.
2. Use the tooltips to help fill in your information:
   - In the **Product and Unit** field, select the product and unit for which you’re creating this price list item.
   - To offer a discount on the combination of the product and unit, select a **Discount List**.
   - In the **Quantity Selling Option** drop-down list, select whether the product or service can be ordered in whole, partial, or both types of quantities. This information is used in the Quantity field of **Quote Product**, **Order Product**, and **Invoice Product** records.
     - **No Control**. Dynamics 365 Field Service doesn't enforce a quantity selling option.
     - **Whole**. Selling a partial product isn't allowed. For example, digital cameras cannot be sold in fractions.
     - **Whole and Fractional**. The product can be sold in both whole and fractional units. For example, wood chips can be sold in cubic yards, or in fractions of a cubic yard.
   - In the **Pricing Method** drop-down list, select an option that determines how the pricing will be calculated. It could be a certain amount, or a percentage of the current or standard cost.
   - If you selected **Currency Amount** as the pricing method, in the **Amount** field, type the amount at which the product will be sold.
   - OR-
     - If you selected any value other than **Currency Amount**, you can set up a rounding policy. For example, if you want per-unit prices to be in the form of $0.99, you can select a rounding policy where all prices per unit automatically have a price that ends in 99 cents. To do this, select the rounding policy to round the price up, and then set the price to end in a certain amount, like 99 cents.
       - **None**. Prices are not rounded.
       - **Up**. Prices are rounded up to the nearest rounding amount.
       - **Down**. Prices are rounded down to the nearest rounding amount.
       - **To Nearest**. Prices are rounded to the nearest rounding amount.
   - In the **Rounding Options** drop-down list, select **Ends In** or **Multiple of** if you want the price to end in a certain amount or multiples of a certain amount.
   - In the **Rounding Amount** field, enter the amount.

3. Click **Save**.

### Add territory relationships

Add default price lists for territories or customer segments. This makes it easier for your Field Service team to see the default price list for the area they are working in. You can have one price list as the default for multiple territories.

1. In the price list record, in the **Territory Relationships** section, click **+Add Connection record**.
2. In the **Connections** form, in **Name**, click the **Lookup** button, and then select a territory.

3. Click **Save & Close**.

4. In the price list form, click the **Auto Save** button.

---

**Set up purchase order sub-statuses**

Purchase orders can be created to track items that need to be ordered from your suppliers. A purchase order record has system status values of Draft, Submitted, Canceled, Products Received, and Billed. Optionally, you can create one or more sub-status values for each of the system status values to help track the purchase order status more precisely, according to your business practices.

For example, for the system status of Submitted, you could create sub-status values of "Waiting for vendor confirmation" and "In route to warehouse."

1. From the main menu, click **Field Service > Administration**, and then choose **Purchase Order Sub-Statuses**.

2. On the **Active Purchase Order Sub-Statuses** screen, click **New** in the upper left corner.

3. Use the tooltips to help fill in information, and then click **Save**.

---

**Create a warehouse**

Track your product inventory using a warehouse record in Dynamics 365. To do this, create a warehouse record, and then add your product inventory to it.

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**Step 1: Create a warehouse record**

1. From the main menu, click **Field Service > Administration**, and then choose **Warehouses**.
   - Or, from the main menu, click **Field Service > Warehouses**.

2. On the **Active Warehouse** screen, click **+New** in the upper left corner.

3. Use the tooltips to help fill in your information, and then click **Save**.

---

**Step 2: Manually add product inventory to the warehouse record**

Product inventory is automatically adjusted in the warehouse record when an inventory adjustment record is created.

You can also manually add product inventory to a warehouse record, but keep in mind that you won’t be able to modify the quantity values.

1. From the top menu, click the drop-down arrow next to the warehouse that you created, and then click **Product Inventory**.

2. Click **+Add New Product Inventory**.
3. Fill in the **Product**, **Unit**, and **Quantity** information.

4. Click **Save & Close**.

**Optional: Add a reorder and location inventory**

1. Go to a Warehouse, and then select **Product Inventory**.
2. Select a product.
3. You can specify the **Bin** and **Row** where the product resides in the warehouse. You can also render a reorder point.

**Create ship via**

When you create a purchase order in the system, it's a good idea to track how the order is shipped. This helps you track the purchase order. The ship-via option lets you specify different shipping methods used by your company.

For example, you might use freight shipping, USPS Ground, or FedEx when products are purchased. In this case, you can specify these shipping methods in the ship-via setting. When you create ship-via methods, you'll see this in the purchase order form.

1. From the main menu, click **Field Service > Administration**, and then choose **Ship Via**.
2. On the **Active Ship Via** screen, click **+New** in the upper left corner.
3. Use the tooltips to help you fill in your information, and then click **Save**.

**Create an RMA sub-status**

When product needs to be returned, a return merchandise authorization (RMA) is created. Set up an RMA sub-status to specify the return status more precisely, in accordance with your business processes.

1. From the main menu, click **Field Service > Administration**, and then choose **RMA Sub-Statuses**.
2. On the **Active RMA Sub-Statuses** screen, click **+New** in the upper left corner.
3. Use the tooltips to help fill in your information, and then click **Save**.

**Set up RTV sub-statuses**

When a product needs to be returned to a vendor, a return to vendor (RTV) record is created to track the returned items. RTV sub-status values can be created to specify the return status more precisely, in accordance with your company's business processes.

1. From the main menu, click **Field Service > Administration**, and then choose **RTV Sub-Statuses**.
2. On the **RTV Sub-Statuses** screen, click **+New** in the upper left corner.
3. Use the tooltips to help fill in your information, and then click Save.

**Set up customer agreements**

An agreement provides the framework to automatically generated work orders and invoices. They are ideal for preventative maintenance-type work.

An agreement allows you to choose how often work orders will be generated (for example, daily, weekly, monthly, or yearly) and the details of the work order (such as incidents, products, services, and service tasks).

Tips:
- A single agreement can have numerous agreement schedules. As an example, you may create an agreement schedule called “Weekly Visits” that creates work orders every week with specified incidents, products, services, and service tasks. Additionally, within the same agreement, you may have another agreement scheduled titled “Monthly Visits” that creates work orders every month with different incidents, products, services, and service tasks.
- The price list on the agreement specifies the price of all products and services related to an agreement. It is important to add all products and services that will be used during the agreement to the agreement price list. Agreements usually contain a negotiated price for goods and services that are usually reflected in an entirely new price list.
- Though the agreement provides a framework to generate work orders, details can still be edited at the work-order level. As an example, though a work order may be generated from an agreement, more products and services can be added to the work order "ad hoc", and other details, such as price list and work order type, can be changed, assuming sufficient permissions.

**Create an agreement**

1. From the main menu, click **Field Services > Agreements**.
2. On the **Active Agreements** > screen, choose +New.
3. Fill in your information. Use the handy tooltips as a guide.
   - **Summary.**
     - **General:** Fill in the basic information regarding the agreement, such as where the agreement work order will take place, and which account the bills will go to.

   ![Note]
   
   For the agreement option to be active in the system, and create agreement booking dates or agreement invoice dates, the agreement must be active. To do this make sure **System Status** for the agreement is set to **Active**.

   - **Details:** Enter the start and end dates of the agreement
• Settings:
  • General: Add a price list that control the price for products and services used in the agreement. Enter the work order service territory

4. Click Save.

Define booking setup

Once the agreement has been created, specify how often work orders are generated.

1. In the Booking Setups section, click +Add Booking Setup record.
2. Fill in your information to create the agreement schedule. Use the handy tooltips as a guide.
   • Auto Generate Work Order helps you decide if you want the system to automatically generate work orders. The system will generate work orders on a rolling basis. Generated work orders will appear in the active work order view with a status of open-unscheduled. If set to No, you have to manually generate the work order for each schedule date.

☑ Note
   If you choose not to auto generate the work orders, you can go to the agreement booking dates and manually generate the work orders.

• Given that the system is automatically generated work orders, do you want it to schedule those work orders as well? If so, mark Auto Generate Booking as Yes and choose a preferred resource and start time. When the work order is generated, the system will also schedule it, creating a work order schedule and displaying it on the schedule board.

• If you choose to have the system auto-generate work orders, then choose how many days in advance to Generate Work Order Days in Advance. If you choose a large number of days in advance, you may have a lot of work orders just sitting there, but if you choose too few days in advance, you may not have time to prepare.

• Pre Booking Flexibility and Post Booking Flexibility fields specify how many days before and after the anticipated schedule date the work order is allowed to be scheduled. These will populate the Time Window Start and Time Date Window End fields that aid the schedule assistant.

• The Priority will pass down to every work order that is generated from this agreement schedule.

• The Work Order Summary will pass down to every work order that is generated from this agreement schedule.

• If you configure the agreement to automatically generate bookings, then choose a:
  • Preferred Resource: for the work order.
  • Time Window Start and Time Window End can be specified to create a time window for generated work orders, and will be taken into account by the schedule assistant. (Example: Work Order should be scheduled between 8 a.m. and 12 p.m.)
3. To set up a recurring booking for this agreement, on the command bar at the top, click **Booking Recurrence**.
   - Specify the recurrence and then click **Save**.
4. When you are done, click **Save**. This will automatically generate the agreement booking dates within 24 hours.
5. To add incidents to the agreement booking setup, click **Add Agreement Booking incident record**.
   - Use the tooltips as a guide to specify the incident details, and then click **Save & Close**.
6. To add agreement booking dates, click **Add Agreement Booking Date record**
   - Use the tooltips as a guide to specify the booking date details and then click **Save & Close**.
   - There is a field on the incident type record called **Copy incident item to agreement** and if marked **Yes**, then when you link the incident to the agreement booking setup then all service task, products, and services that are associated with the incident will be copied to agreement booking setup. If you need to make changes to service tasks, products, or services you can do so from the service task, product, and services section within the agreement booking setup record. This information is automatically copied over to any work order that is created for the agreement booking setup.
     If copy incident item to agreement is marked, **No** then the information is not copied over from the agreement booking setup but rather when work orders are created the service tasks, products, and services will inherited directly from the incident type service task, products, and services.

**Add invoice setup**

Automatic billing invoices are generated at a set recurrence for a set price. The customer is billed for a product in the system. You can use this to bill customers for subscriptions, rental fees, and retainer services.

1. In the **Invoice Setups** section, click **Add Agreement Invoice Setup record**. Fill in your information. Use the handy tooltips as a guide.
2. To set up an invoice recurrence for this invoice setup, on the command bar at the top, click **Invoice Recurrence**. Specify the recurrence details and then click **Save**. When you have, recurrence setup the system will generate invoices on a rolling basis.

**Note**

The invoice will generate in advance depending on what you have set in the **Generate Agreement Invoices X Days in Advance** field in the **Field Service Administration** settings under the **Agreement** section. This means the invoice due date is set based on your recurring invoice setup but it will be created x days in advance. The generate invoice date setting does not override your invoice recurrence, that you specified in step 2.

3. Click **Save**.
4. In the Invoice Product section, click +Add Agreement Invoice Product record. The products will be added to your invoice at the time the invoice is generated.

**Set up agreement sub-statuses**

Set up agreement sub-statuses to specify the current agreement status more precisely, according to your company’s business processes.

1. From the main menu, click **Field Service > Administration**, and then choose **Agreement Sub-Statuses**.
2. On the Active Agreement Sub-Statuses screen, click +New in the upper left corner.
3. Use the tooltips to help fill in your information, and then click **Save**.

**Set up payment terms**

Payment terms are primarily used in conjunction with purchase orders, to allow the purchasing manager to specify terms when creating a purchase order.

1. From the main menu, click **Field Service > Administration**, and then choose **Payment Terms**.
2. On the Active Payment Terms screen, click +New in the upper left corner.
3. Use the tooltips to help fill in the information, and then click **Save**.

**Set up tax codes**

Set up tax codes and specify how much tax will be applied to your products, agreements, and services. Each tax code may contain multiple child tax codes; in that case, the tax rate will be determined by the total of all children.

If an area has more than one type of tax, for example, state and county tax, then use the Tax Group option to combine several tax codes into one group.

For example, if the state of California has a state and county tax, then you might have a tax group called "California, Alameda County." The tax group will have two tax codes: one for overall California state tax and one for Alameda County local tax.

1. From the main menu, click **Field Services > Administration**, and then choose **Tax Codes**.
2. On the Active Tax Codes screen, click +New in the upper left corner.
3. Use the tooltips to help fill in your information, and then click **Save**.
4. If **Act as tax Group** is set to **Yes**, then do this:
   a. Go to the Tax Code Details section and click +Add Tax Code Detail record.
   b. Specify the Tax Code.
   c. If the government agency charges tax above the local tax then set Tax on tax to **Yes**.
For example, the Canadian government charges Provincial Sales Tax (PST) and Goods and Services Tax (GST). In this case, you will need to set a tax on tax. For instance, if the work order total equals $100, the first tax code in the group is calculated on the $100. If the tax code is 5% then the total is now $105. If the second code in the tax group is 10%, and it is marked as a tax on tax, this 10% is calculated on $105 instead of $100, which makes the total $110. However, if this second code is not flagged as a tax on tax, then the 10% is calculated on the initial work order amount, of $100.

d. In the Line Order field, enter the order of how the system should calculate the multiple tax codes.

e. Click Save.

Configure the schedule board

The schedule board provides an overview of resource availability and bookings you can make. Before you use the schedule board, it is important to set up the views and filters to your preference.

◆ Important
To use the schedule board booking functionality, geocoding, and location services, you need to turn on maps.
1. From the main menu, click Resource Scheduling > Administration.
2. Click Scheduling parameters.
3. Open record and scroll down to the Resource Scheduling Optimization section.
4. On the Connect to Maps field, choose Yes.
5. Accept terms and save the record.

View the schedule board

- To view the schedule, from the main menu click Resources Scheduling > Schedule Board.

Overview of the schedule board

When you hover over a booking using your mouse, you'll see additional information about it. The line color indicates the type of booking, such as work order, case, or opportunity.

Bookings that are not linked to an entity don't have a color associated with them.

When you're looking at the schedule board for the current day, you'll see a blue line which indicates the current time of day. You can also see a picture of all the resources listed on the schedule board. To quickly view contact information for a resource, hover over their name to view the contact card.
Configure the filter and map view

Map view shows the location of resources, organizational units, bookings, and requirements. The screenshot below shows the color legend.

Set filters

1. From the main menu, click Resource Scheduling > Schedule Board.
2. Filter & Map View: Click the Filter tab to filter information by Characteristics - Rating Roles, Territories, Organizational Units, Resource Types, Teams, and Business Units to narrow or expand the schedule board view.
• **Characteristics – Rating**, filters by skills that resources possess, with a rating of familiar, good, or proficient. More information: [Set up characteristics (Field Service)]

• **Roles**, filters by resource role and associates skills and proficiencies to that role. More information: [Service Territory] filters will narrow down the schedule board to only those resources who belong to that territory.

• **Organizational units** filters groups or divisions in a professional services company that employs billable resources with cost rates that are distinct from other such groups or divisions in the company.

• **Resource Types**, when selected, will show up in the Schedule Board pane by associated category. Categories are defined by the user, but could include things like crew, technician, or plumber.

• **Teams** filters by teams that have been set up.

• **Business Units** filters by groups that have specific access to information to do their job. Set default filters

[Image]

• If you update a filter and want to save it as your new default filter, click **Options > Save Current Filters as Default**.

• To go back to your default filter, click **Options > Load Default Filters**.

**Set options to see a specific set of resources**

You can also create an option to see only a specific set of resources on the schedule board. For example, a dispatcher using Field Service can create an option to only see resources on the schedule board that are in the Washington territory. Once this is set, when you use the filter option it will only show your specified set of resources.

1. Click **Options > Select Resources**.

2. In the **Resources** dialog box, use the **Resource Type** and **Service Territory** filter to find the set of resources that you want to see on the schedule board.

3. When you see the resources that you want to work with under **All Resources**, click **Move all to right**.

4. When you're done, click **Apply**.
Configuration tabs
Configuration tabs let you choose the time unit to be displayed, the view orientation, the time offset, and other actions like getting driving directions, moving bookings to the next day, printing the schedule, or add a booking alert.

View Options
- To configure the schedule board's time horizon to see hours, days, weeks, months, or years at a time, click the Hours button, and then choose an option.
- By default, the schedule board is presented in horizontal view, with the time in columns and resources in rows.
  - To see a vertical layout of the schedule board, click Vertical View. The vertical view shows the same information, but changes the appearance of the schedule board. The resources are presented in columns and time is shown on the left.
  - Select the Map View option to show a map version of the schedule board. This is the same map view that appears in the Filter & Map view pane on the left.

Scheduler settings
Scheduler settings let you configure your time offset so you can synchronize dates and content with a location.
- Click the Scheduler Setting button and choose the following:
  - **Time Zone**: Choose what time zone to work in.
  - **Working Time**: Choose the start and end time of your working hours.
  - **Time Resolution**: Set the time by sliding the bar left or right; this lets you schedule resources in more precise time intervals.
  - **Resources per page**: Set up the number of resources to be displayed on the screen. The schedule board's appearance will change to show only the number of days selected.
  - **Number of Days**: Set up the number of days to be displayed on the screen. The schedule board's appearance will change to show only the number of days selected.
  - **Sizes**: Lets you adjust the size of the columns and rows on the schedule board. You can slide the bars to set the ideal height and width that will show all necessary information on the scheduled booking, rather than having some of it cut off.
  - **Travel Duration Settings**: Lets you see travel time on the schedule board. To activate this setting, select the Show Travel Time check box.
  - **View Settings**: Lets you hide canceled bookings, deactivated bookings, and hide the legend on the map.
• **Booking Requirements Settings**: This filter shows only booking requirements for a specified territory.

**Details**

Click **Details** on the right to see a detailed view of bookings.

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**Configure Booking Requirements**

The booking requirements area is shown at the bottom of the schedule board and lists all unscheduled bookings. You can easily drag and drop unscheduled bookings from the list onto the schedule board. You can also right-click on an unscheduled booking and find available resources from those that are listed on the schedule board, or choose from all the resources in the system. When you do this the filters will show the options for the selected booking requirement. More information: [Schedule a work order (Field Service)](#)

- Go to the list of existing unscheduled booking requirements in the lower pane of the schedule board.
  - Click column headings to sort data from least to greatest, or to sort it alphabetically, etc.
  - Adjust column width by dragging column boundaries on each column title.
    - Expand or collapse unscheduled bookings panel by clicking the down arrow in the upper right corner of the list view pane.
  - To access information on more unscheduled bookings, use the lower navigation arrow to move to the next page.
Create additional tabs

- To add a new schedule board tab, click +Add Tab at the top.

**Note**

To edit an existing schedule board view, double-click the view name.

- A window opens showing all the configuration options.
  - Give the tab a name by filling in the Name field.
  - You can configure a tab in a several ways by choosing parameters in each of the configuration options shown in the pop-up window.
  - Click the General Settings, and then choose settings for the map as well as other settings.
  - Click the Schedule Types option, and then choose booking tooltips, template views, and default availability view for each entity type that has scheduling turned on.
  - Click Add at the bottom of the pop-up window to create the new tab.

**Note**

Your admin can also add custom views to the list.

- Click the Unscheduled Panels view, and then choose a view from the drop-down list. Choose a view for the unscheduled bookings at the bottom of the schedule board.

Add booking requirements tabs

You can create booking requirement tabs for different types of bookings. For example, you can create separate tabs for work orders, cases, and opportunities.

Before you create tabs, make sure the entity is enabled for scheduling.

1. On the schedule board, double-click Initial public view.
2. Scroll down to the Requirement section to add additional tabs.
Create a work order

A work order has information on what work needs to be done. It is used to coordinate and schedule resources and activities. It can be used for different types of work, such as installations, repairs, or preventive maintenance.

A work order is usually created from an agreement, a case, or on its own. It is then scheduled either manually or using the schedule assistant and then dispatched. Once the work is complete, it is reviewed and approved by a manager.

**Note**

Products, service tasks, and characteristics are added automatically when you create a work order from an incident. Otherwise you can add them manually when you create a work order.

Work order lifecycle

- Work order creation: A work order is created, usually from an agreement, case, or sales order.
- Schedule: The work order is then scheduled.
- Dispatch: The work order is dispatched.
- Service: The work order is performed and details are updated.
- Review/Approval: The work order is reviewed and approved by a supervisor.
- Invoice and inventory adjustment: Inventory adjustments are made and an invoice is generated for the corresponding account.

| What happens | New work order is created. Assigned incident, product, services, skills, territory, etc. | Work order schedule is created. Resource assigned to the work order. | Field agent notified of work order. Field agent may review and accept/decline the work order. | Work order is carried out. Information about what is performed in the field is entered through the mobile app. | Supervisor verifies that all work was done properly, and that all information regarding the work order is correct. | Invoice is created based on products and services used. Inventory adjustment s are made. |

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Create a work order

1. From the main menu, click **Field Service > Work orders**.
2. Click **+New** in the upper-left corner.
3. Fill in your information. Use the handy tooltips as a guide.
   - **Summary**
     - **General**: Fill in the basic information regarding the work order, such as the work order number and the service account it is associated with, a summary, and status, which can show whether the work order is unscheduled, scheduled, in progress, or finished.
     - **Primary Incident**: Enter more information regarding the nature of the work to be performed.
• **Total**: Enter pricing information for the work order. This will show total pricing information for tasks, including products and services.

• **Settings**
  - **General**: Specify the category the work order may fall into. Also, fill in important information regarding the location of the work order, price list, service territory, and more.
  - **Sales tax**: Sales tax information is inherited from the service account.
  - **Preferences**: Enter the resource and time information for the work order.
  - **Follow up**: Shows instructions of how to proceed if desired, or whether the work order calls for a follow-up.
  - **Related to**: Specify if the work order is related to an originating work order or agreement.
  - **Preferences**: Specify any preferred time windows.
  - **Source**: Specify source information regarding the work order.
  - **Address**: The address where the work will be performed. The address should be inherited from the service account.
  - **Location**: Shows the address location on the map.

### Add service tasks, products, or services to the work order

When the work order has been created and saved, you can then add any related tasks, products, or services to the work order.

- Go to the **Service Tasks** section and click **Add Work Order Service Task record**. Fill in your information. Use the handy tooltips as a guide. More information: [Set up service task types (Field Service)]
- Go to the **Products** or **Services** section and click the **+** button. Fill in your information. Use the handy tooltips as a guide. More information: [Create a product or service (Field Service)]

**Note**

When you add a product, remember that if you want to reserve a product for the work order, set **Allocated** to **Yes**.

### Schedule a work order

Once a work order has been created, it’s ready to be scheduled. More information: [Create a work order (Field Service)]

Before you use the schedule board, it’s important to set it up. More information: [Configure the schedule board]
Schedule a work order manually

1. From the main menu, click Field Service > Schedule Board.
2. There are several ways to manually schedule a work order:
   - Right click on an unscheduled booking and find available resources.
     i. From the Booking Requirement list, right click on an unscheduled booking and choose one of the following:
        1. Choose Find availability -Current Resources to find available resource from the list of resources on the schedule board.
        2. Choose Find availability -Current Resources, to find available resource from resources in the system
           ✓ Note
           When you do this, the filters will show the options for the selected booking requirement.
    3. When you see the available slot right click on the time slot on the schedule board and choose Book Here. Or, drag and drop the booking requirement to the available time slot.
   - Drag unscheduled work orders from list view to the schedule board.
     i. Select an unscheduled work order from the list at the bottom.
     ii. Drag the work order to an available resource/time slot on the schedule board.
   - Block out a slot on the schedule board directly, and select an unscheduled work order to schedule.
     i. Select an available slot for the resource you are trying to schedule.
     ii. While holding down Shift, click and drag across to highlight the duration you want to schedule.
     iii. A pop-up window appears that allows you to choose a work order to schedule during the time slot. You can also create a work order from this screen by clicking New in the bottom left corner.

Schedule a work order using the Book option

1. From the main menu, click Field Service > Work Orders.
2. Select a work order from the list, or click the work order number.
3. On the command bar, click Book.
4. Choose from the recommended resources and then click Book & Close.

✓ Note
You can also the filter to find other resources.
Schedule a work order using the scheduling assistant
1. From the main menu, click Field Service > Work Orders.
2. Select a work order from the list, or click the work order number.
3. On the command bar, click Schedule Assistant.
4. When the schedule assistant opens, choose the constraints that you will use to query the system to find available resources and time slot options.
   - Duration: Pulled from the estimated duration on the work order, which is driven by the incidents.
   - Radius Constraint: Select the radius for the available resources. This defaults from a Field Service setting.
   - Start and End Days: Choose the date ranges. This is driven from the date window fields on the work order.

Reassign and reschedule a work order
- From the schedule board, choose the work order, and then drag it to a new time slot or resource.

Move work orders not completed to a future day
- Click the Actions menu, and then select Move Booking to Next Day.

Submit and approve time-off requests
Keep the schedule board up-to-date by logging time-off requests.
For example, if one of your field technicians is taking a vacation, it's important to log the request so that a dispatcher can see the time-off request on the schedule board when scheduling a work order.
When a resource has an approved time-off request, the scheduling assistant will not recommend that resource for a job in that time period, and the time slots for that resource will be grayed out on the schedule board to provide a visual notification to the dispatchers that the resource is not scheduled to be available during that time period.
If a bookable resource is set to require time-off approval, then when a time-off request is created for that resource, an approval request will be sent to that user's manager, before the time-off request is reflected in the schedule assistant and on the schedule board.

Submit a time-off request
1. From the main menu, click Field Service > Time Off Requests.
2. On the Active Time Off Request screen, click New.
3. Use the tooltips to help fill in your information, and then click Save.

**Approve a time-off request**
1. From the main menu, click Field Service > Time Off Requests.
2. From the list of views, click the arrow and select Inactive Time Off Requests. This shows a list of unapproved time-off requests.
3. To approve a request, select it, and in the command bar at the top, click Approve.
4. When the approval is completed, click OK.

**Configure and set up customer assets**
Customer asset functionality lets you maintain a list of serviceable items related to a service location. When you create and maintain a list of serviceable items, you can:
- Record specific information about the item.
- Create a historic log of all of the work orders that are related to the item, which gives you a complete service history for the item.

Customer asset records can be configured in a hierarchy in order to maintain service history at the sub-component level.

Note: To associate customer assets with work order records, you must specify the customer asset within the work order incident or agreement incident records.

**Create customer assets manually**
1. From the main menu, click Field Service > Customer Assets.
2. On the Active Customer Assets screen, click New. Use the tooltips to help you fill in information.
3. Enter the Name of the customer asset record.
4. Enter the Service Account to indicate the service location of the customer asset.
5. Optionally, enter the direct Parent of the current asset if you are creating a sub-component customer asset. For example, a refrigerator asset record can be the parent asset to a compressor asset record.
6. Optionally, enter the Product from the product catalog that identifies this asset.
7. When you're done, click Save.
8. In the Sub Assets section, click Add Customer Asset record to add any related assets.
Automatically add customer assets to a service location

1. In the product catalog, find a product that you would like the system to automatically add as a customer asset when sold to a customer.
2. In the Field Service section of the product record form, set the Convert to Customer Asset field to Yes.
3. Save the changes to the product record.
4. Now, when a work order is completed, by changing the work order system status to Closed - Posted, if the work order includes a work order product that was set to Convert to Customer Asset, the system will automatically generate the customer asset record, and associate it with the service account listed on the work order.

Create a purchase order

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

Step 1: Create a purchase order (P. O.)

1. From the main menu, click Field Service > Purchase Orders.
2. On the Active Purchase Orders screen, click +New.
3. Use the tooltips to help you fill in your information.
4. When you're done, click Save.

Note

If you need to relate a P. O. to a work order, open the work order, and then from the top menu (next to the work order name) click the drop-down arrow and choose Purchase Orders. Click +Add New Purchase Order and fill in the required information. If you link the P. O. to a work order, then when you receive the product it will be added directly to the work order as a work order product.

Step 2: Add products to the P. O.

More information: Create a product or service (Field Service)

1. In the Product section, click +Add Purchase Order product record.
2. Use the tooltips to help you fill in your information.
3. When you're done, click Save & Close.
Step 3: Get the P. O. approved
More information: Create a product or service (Field Service)

- If you have permissions to approve the P. O., then go to the purchase order and change the Approved Status to Approved.

Step 4: Create a receipt for the P. O.
When the order arrives, then you can create a receipt.
1. From the main menu, click Field Service > Purchase Order Receipt.
2. On the Active Purchase Order Bills screen, click +New.
3. Give the receipt a name and assign it to the purchase order, and then mark the person creating the receipt.
4. Click Save.

Step 5: Add P. O. receipt products
1. Form the top menu, click the drop-down arrow next to the P. O. name that you created, and then click Receipt Products.
2. To show open P. O. products in the Purchase Order Receipt Product field, click Show Purchase Order Products not fully received yet.
3. Click the area under the Quantity field and type in the quantity to be received.
4. Click Save.
   If the product is an inventory item, then an inventory adjustment product record is created automatically when you receive the product. When inventory adjustment product records are created, inventory journals are automatically created, which drives your total inventory count in the product inventory table.

Step 6: Create P. O. bill
Once you receive an invoice from the vendor, then you can create a purchase order bill.
1. From the top menu, click the drop-down arrow next to the P. O. name that you created, and then click Bills.
2. On the Purchase Order Bill Associated View screen, click +Add New Purchase Order Bill.
3. Use the tooltips to help fill in your information:
   - Enter a **Bill Date**—this is the date that’s on the purchase order bill.
   - Enter a **Vendor Invoice Number** so that you’ll have a cross reference to the invoice number that the vendor provided.
4. Click **Save**.
5. To add items on the bill, from the top menu, click the drop-down arrow next to the bill name, and then click **Receipt Products**.
6. On the **Purchase Order receipt Product Associated View** screen, click **Add New Purchase Order Receipt Products**, and then add the item.

### Create an inventory transfer

An inventory transfer is when you change the warehouse location of product inventory. For example, if you decide to transfer Product A from Warehouse 1 to Truck 2, then you would create an inventory transfer record. Next, you’ll specify the product that you are moving from one location to another.

When you transfer inventory, it automatically creates an inventory adjustment product record within the inventory transfer record.

1. From the main menu, click **Field Service > Inventory Transfers**.
2. On the command bar at the top, click **Transfer Inventory**. A new pop up window will appear.

   **Note**
   
   Do not create an inventory transfer using the **+New** option.

3. Select the **Source Warehouse**; this is where the inventory is currently stored.
4. Select the **Destination Warehouse**; this is where the inventory will be moved to.
5. Enter the quantity you want to transfer in the **Transfer Qty** field. Remember, you cannot transfer more than what is listed in **Quantity On Hand**.
6. Click **Transfer**.

### Create an inventory adjustment

An inventory adjustment is when you add or subtract inventory to or from a warehouse. Let’s say you’re getting a new shipment of Product A that you’re going to add to Warehouse 1. In this case you would create a new inventory adjustment record and specify the warehouse. Next, you’ll add the product to the inventory adjustment record and specify the product, unit, and quantity.
Step 1: Create an inventory adjustment
1. From the main menu, click Field Service > Inventory Adjustments.
2. On the Active Inventory Adjustment screen, click +New.
3. Choose the Warehouse where the inventory will be added or subtracted.
4. Choose who is making the adjustment:
   • If you're making the inventory adjustment, choose your name in the Adjusted By Resource field.
   • If another resource requested the adjustment, choose their name in the Adjusted By Resource field.
5. Click Save.

Step 2: Add products to the inventory adjustment
1. From the top menu, click the drop-down arrow next to the item you created, and then click Products.
2. Click +Add New Inventory Adjustment Product.
3. Fill in the Product, Unit, and Quantity.
4. Click Save & Close.

Process a return
A return merchandise authorization (RMA) is created in the system when a product is returned. There are three ways of returning a product: return to warehouse, return to vendor (RTV), or change equipment ownership.

All product returns are initiated with an RMA. The RMA designates the product, unit, quantity, related work order, and price list for the return. It also specifies the processing action, which is the type of return.

A return is not finalized until an RMA receipt is created. The RMA receipt confirms that the correct product and quantity are received, as well as the date and person handling the receipt.

After the RMA receipt is processed, the correct inventory or equipment adjustment is carried out. This can be a return to the warehouse, RTV, or a change in equipment ownership.

In cases where a product must be returned to a vendor, an RTV must be created after receipt of the product that is going back to the vendor.

Step 1: Create an RMA
1. From the main menu, click Field Service > RMAs.
2. On the Active RMAs screen, click +New.
3. Fill in your information. Use the handy tooltips as a guide.
• If the product was used in a work order, choose the related Work Order where the product was used. The related Service Account is automatically filled in when you choose a work order.
• Choose an RMA substatus, for example, Exchange, Repair, Retire, or Upgrade. These options are configurable in the admin section. More information: Create an RMA sub-status (Field Service)
• Select the Date Requested and if it's Taxable or not.
• Specify the price of the product being returned by choosing a Price List.

4. When you're done, click Save.

Step 2: Add RMA products
Once an RMA is created, you must add the products to be returned. There are two ways to add RMA products—either manually or by choosing a product that was used in a work order.

To add products manually, do this:
1. In the RMA record, scroll down to the Product section, and then click +Add RMA Product Record.
2. Use the tooltips to help fill in your information, and then click Save & Close.

Or, to add products used in a work order, do this:

☑ Note
To Add WO Products, a work order must be associated with the RMA.

1. In the RMA record, on the command bar at the top, click Add WO Products. The Add WO Products dialog box opens.
2. From the list of Work Order Products, select the Return check box for the products that are being returned.

☑ Note
If the full quantity is not to be returned, you can choose a different value in the Return Value column, for example, if 5 units were used on a work order, but only 3 are being requested for a return.

3. For each work order product to be returned, choose a Processing Action. This is the type of return. Choose from the following options:
   • Create Return to Vendor (RTV)
   • Return to Warehouse
   • Change of Equipment Ownership
4. Next, specify the destination of the return. For example, if your Processing Action is Return to Warehouse, then in the Return to Warehouse column, choose the warehouse the product is going back to.
5. When you're done, in the Add WO Products dialog box, click Ok.
Step 3: Approve the RMA
If you're the approver, open the RMA and verify that the return has been filled in correctly, and approve the RMA. Here are some of the things you may want to do:

- Verify RMA products are linked to customer equipment records.
- Decide if RMA products can be returned and if a credit must be issued.
- Verify the reason for the return from the customer.
- Arrange shipping and transportation.
- Mark the RMA as Approved.

✓ Note
The approval process depends on your company's return policy. The above is a general list to give you an idea of what you might look for when processing a return.

Step 4: Create an RMA receipt
1. In the RMA record, on the top menu, click the drop-down arrow next to the name of the RMA record, and then click Receipt.
2. Click +Add New RMA Receipt.
3. Use the tooltips to help fill in your information:
   - Give it a Name.
   - In the Received By field, choose the person who is handling the receipt.

Step 5: Add RMA receipt products
1. From the RMA receipt record, scroll down to the Products section.
2. Click +Add New RMA Receipt Product record.
3. Fill in your information. Use the handy tooltips as a guide.
4. Enter the RMA Product and Quantity received.
5. Click Save.

Step 6: (Optional) Create an RTV
You only need to create an RTV if the return is going back to the vendor.
Once the product is received by the vendor, you will create an RTV.
1. Go to the RMA receipt record, and then scroll down to the Products section.
2. In the RMA record, on the command bar at the top, click Create RTV. The Create RTV dialog box opens.
3. Review the details, and then select the Return check box.
4. A dialog box opens, confirming the RTV has been created.
5. To see the RTV record, from the main menu go to Field Services > RTVs.
6. Click the RTV record that you created to open the record.
7. To track the return, mark when it was approved, shipped, and received.
8. To credit the customer, go to the RMA, and then click RMA Product.
9. Set Credit to Account to Yes.
10. Click Save.
11. To issue a credit memo, go back to the RMA, and then to RMA Receipts.
12. Click the RMA receipt.
13. On the command bar at the top, click Credit to Customer.

Create a return to vendor

Create a return to vendor (RTV) when you need to return a product back to the vendor.
1. From the main menu, click Field Service > RTVs.
2. On the Active RTVs screen, click +New.
3. Use the tooltips to help you fill in your information, and click Save.

View product inventory

View product inventory to get a snapshot of the inventory you have at a warehouse.
1. From the main menu, click Field Service > Warehouses.
2. Select a warehouse from the list.
3. From the top menu, click the arrow next to the warehouse name, and then click Product Inventory.
   - Quantity Available represents how many units of the product are free to be used.
   - Quantity Allocated represents how many units of the product from this warehouse are reserved for work orders.
   - Quantity On Hand is the total of available and allocated inventory.
   - Quantity On Order represents how many units of that product are currently in the purchasing process, but have not yet been received.
Field Service Mobile App User’s Guide

Field Service for Microsoft Dynamics 365 (mobile) give your field agents all the information they need to get to a customer location and complete work orders quickly.

Before you can start using Field Service - Dynamics 365 (mobile), your Dynamics 365 administrator will need to install a mobile solution. More information: Install the Field Service mobile app

Install the mobile app

Field Service - Dynamics 365 (mobile) is supported on the following devices:

- Windows 10
- iOS 6 +
- Android phone

To download the app, search for Field Service Mobile in your device's app store.

Sign in

Now that you've installed Field Service - Dynamics 365 (mobile), let's get started! First, you need to sign in. You'll need your Microsoft Dynamics 365 web address, user name, and password. If you don't have any of these, contact your Dynamics 365 admin.

1. When the app is installed, sign in with your Dynamics 365 credentials, and then tap Sync.
2. After you sign in, you'll see the Home screen. Here, you can tap **Setup** to see or change your sign-in information.
3. To sync your device to the server, tap the Sync button. This downloads changes made on the server to your device, and uploads information from your mobile device to the server.

### Work online or offline

Field Service - Dynamics 365 (mobile) lets you work online or offline. Online mode requires an Internet connection; offline mode does not.

You can configure the app to sync when it launches, when information changes, or every few minutes. Your system administrator configures this setting.

#### Online mode

When you’re working online, information continuously syncs with the server, so you don’t need to manually sync your device.

- To work online, tap the Online/Offline mode button. This is how the button looks when you’re online.
### Offline mode

When you're working offline, all the information you need is downloaded to your device. This way you can continue your work even without an Internet connection. When you enter information, it's saved to your device and sent to the server on the next sync.

- To work offline, tap the Online/Offline Mode button. This is how the button looks when you're offline.
Get around the app (for all security roles)

When you first sign in to Field Service - Dynamics 365 (mobile), you’ll see your home screen, which shows you a list of actionable items. To get more information, tap any of the items on the left.

Note

If you have a Field Service admin, dispatcher, inventory purchase, or resource (field agent) security role, you can use Field Service - Dynamics 365 (mobile). However, depending on your security role, you may not have permission to access or change certain data in the app.

Dashboard

Your dashboard provides a quick overview of business data. Depending on how things are set up in Field Service - Dynamics 365 (mobile), you may see a default system dashboard or one that you created.
Accounts

In Accounts you can see a list of your service accounts.
To see where all the accounts are located on a map view, tap the Map View button.
To add a new account, tap the + button, and then add your information.

Tap an account name to see the account information.
Tap the Edit Account button to edit the account info, such as name, address, and phone number.
To get more information related to the account, tap any of the buttons at the bottom.
**Bookable Resources**

In **Bookable Resources** shows your work order bookings.

By default, work orders are listed in the **Agenda view**. To change views, tap **Day**, **Week**, or **Month**.
Contacts
Contacts shows a list of all your account contacts.
To see where your contacts are located on a map, tap the Map button.
To add a new contact, tap the + button, and then add your information
Tap a contact's name to see the account information.
Tap the Edit button to edit the contact's info, such as name, email address, and phone number.
To get more information about the contact, tap any of the buttons at the bottom.
Customer Assets

In Customer Assets, you'll see which products a customer uses.
To add new customer assets, tap the + button, and then add the asset information.
To see information related to the asset, tap the asset name on the left.
Products shows a list of your products, including the price, type of product, quantity on hand, and more. To add a new product, tap the + button, and then add the product information.
To see details about the product, tap **Products**, and then tap a product in the list.
Agreements

Agreements is where you can see customer contracts.

Time off requests

1. If you need to take time off or you are not available to take a new work order, tap **Time Off Requests**, and then tap the + button.

2. Fill in your time off information, and then tap the Save button.

**Note**

This will gray your name out on the schedule board, which lets the dispatcher and scheduling assistant know that you aren't available.
Map
The map shows the location of your accounts and contacts on a map.
To filter the view, tap Accounts or Contacts.
Calendar
The calendar shows your appointments on a calendar.

Setup
To see or update your setup or sign-in information, tap Setup.

About
To see which version of the app you're using, tap About.
Tap the Menu button in the top right to send logs, view privacy info, and more.
For field agents
Field agents can use the mobile app to review work orders and get all the information they need to complete the job.

Review work order bookings
When a work order is assigned to you, it shows up in Field Service - Dynamics 365 (mobile). By default, you can only see work orders for the current day plus the next 7 days, that have a status of scheduled, traveling, or in progress. Once a work order is completed, you can no longer see it in Field Service - Dynamics 365 (mobile).

1. To see your work order bookings, tap Bookable Resource Booking.
2. By default, work orders are listed in the Agenda view. To change views, tap Day, Week, or Month.
You can also tap the Arrow button to see your bookings for the next day. Or, you can use the filter to see work orders with a specific booking status.
Open a work order

1. To open a work order, from the list of bookings, tap the work order that you want to open. The work order opens on the right.

2. To open the work order in full screen view, at the top, double-tap Work Order.
See the location of a work order on a map

1. Open the work order, and then tap Map. This shows the location of the work order on a map.

2. To get driving directions, tap the Driving Direction button. This opens the default driving directions app on your mobile device. It provides turn-by-turn directions from your location to the work order location.
Update the work order status

The minute you start driving to the next job, it’s important to update the status of the work order. This keeps the dispatcher up to date on what’s going on with the work order, and lets the dispatch team provide the customer with the current status.

1. Open the work order, and then tap Booking.
2. Tap Add button for Booking Status.
3. Select a status. If you’re driving to the work order location, then update your status to Traveling.

Note

Make sure to update the status again when you arrive on site, and again when you complete the work order.

4. When you’re done, tap the Save button.

Note

When the work order is complete, remember to mark it as Completed.

Update the work order start time

When a dispatcher schedules a work order, the booking will have a start and end time. This may be the time promised to the customer, but if you’re running late or the job is taking longer than expected, it’s important to update the start and end time. This automatically keeps the dispatcher up to date on the schedule board.

- Open the work order, tap Booking, and then change the Start Time.
Check the work order details
To get more information on what work needs to be done for the service call, look at the Info, Other, and Incidents tabs.
The Info tab provides service account info, address, priority, and more.
The **Other** tab provides billing account info, service time windows, price lists, and more.
The **Incidents** tab shows which incidents are linked to the work order.

![Incidents tab screenshot](image)

**Check service tasks, products, and services**

When a work order is created, incidents are added to the work order, which includes a list of service tasks, products, and services.

Service tasks let a field agent know what tasks need to be performed for the work order. Products tell them what products they might have to use to complete the work order. Services show the hours needed to complete the work.

Check service tasks

1. Open the work order, and then tap **Service Tasks**.
2. Tap a service task to open it.
3. When the service task is open, add notes, mark percentage complete, and how long it took to complete the task.

4. When you're done tap the Save button.
Check products
1. Open the work order, and then tap **Products**.
2. Tap a product name to open it.
3. Mark if the product was used, enter the correct quantity, make sure the price is correct, and add any additional notes.
4. When you’re done, tap the Save button.

Check services
1. Open the work order, and then tap Services.
2. Tap a service name to open it.
3. If the service was performed, mark it as used, and then add any additional information.

4. When you're done, tap the Save button.
Add notes, pictures, signatures, and more
When you're working on a work order you can add your notes, attachments, pictures, and signatures.

Add a picture
1. Open the work order, tap Notes, and then tap the Camera button.

2. Tap the Camera button to take the picture
3. Adjust the picture as needed, and when you're done, tap the Save button.

Add notes
1. Open the work order, and then tap Notes.
2. To add notes, tap the Add button+.
3. Add your notes in the Description area.

4. When you're done, tap Save.

Add attachments, signatures, record video, and more
1. Open the work order, and then tap Notes.
2. Tap the Add button+.
3. Tap the Menu button to add attachments, signatures, record video and more.

4. When you're done, tap Save.
Create a follow-up
If work still needs to be done, you can create a follow-up booking.
1. Open the work order, and then tap Booking.
2. Tap the Menu button, and then tap Create follow up.

3. Tap Open, and then add your information
4. When you're done, tap Save.

Privacy notice
By enabling the Field Service for Microsoft Dynamics 365 mobile app on a mobile device with location features enabled, real-time location data will be sent to Bing Maps and stored in Dynamics 365. Users are prompted to provide permission for the flow of real-time location data during installation or use of the field service mobile app. To disable the flow of real-time location data from the device, the user must disable the device's location features or uninstall the application.
The real-time location data sent by the field service mobile app is used to support the following scenarios:
• To show the location of a user’s customers. Data about the user’s current location is passed to the mapping provider as context for the map rendered by the provider and displayed within field service mobile app.

• To create and update a user’s schedule. Data about the user’s current location is passed to the field service capabilities in Dynamics 365 to create and update a user’s schedule. For example, to assign a task to the nearest technician.

In addition, by enabling the field service mobile app on a mobile device, mobile app usage information, such as application errors, will be sent to Microsoft through a secure connection to Organization Insights and stored in Azure Table Storage.

**Note:** Organization Insights provides the system administrator of a Dynamics 365 organization with a quick overview of how the org is being used. The system administrator can view most active users, the number of SDK requests being initiated, and the number of being viewed by SDK users.

A list of the Azure components and services that are involved with Help Improve Unified Service Desk functionality is provided below.

**Note:** For more information about additional Azure service offerings, see the [Microsoft Azure Trust Center](#).

### Cloud Services
**OrgInsights Data REST API (Web Role)**
This web role accepts requests from the charts that display data in Organization Insights. The API reads aggregated data from the Azure Tables and returns it.

**Azure Blob Storage**
The Monitoring Agent (which runs on every scale group computer) collects the Dynamics 365 organization’s raw telemetry data and uploads it in Bond Format (Binary format) to Azure Blob Storage.

**Azure Table Storage**
Raw telemetry data in Azure Blob Storage is aggregated and stored in Azure Table Storage, which is read by the Cloud Service.

**Azure Active Directory**
Organization Insights uses Azure Active Directory Service to authenticate web services.

**Azure Service Bus**
The Monitoring Agent creates and queues messages whenever it uploads data to Azure Blob Storage. The CMA pipe picks up these messages to aggregate the uploaded data.

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