

Dynamics 365 for Field Service

G-Cloud 14: Service Definition Document

Published: May 2024

1. Service objectives

The objective of this service is to implement Dynamics 365 for Field Service.

Microsoft Dynamics 365 for Field Service ensures the right person, with the right skills and parts, shows up at the right place and right time to improve first-time fix rate, customer satisfaction, and resource productivity. Dynamics 365 for Field Service enables companies to move from a costly break-fix repair model to a more efficient, predictive and proactive service-based model.

Going one step further, Connected Field Service scenarios look to provide further automated capability to optimise resources, increase service productivity and easily access data.



2. Overview of work performed

Leveraging the Sure Step 365 Implementation methodology, Microsoft will help the contracting authority to implement existing business processes and new business processes using the Dynamics 365 platform. This could be a single and/or iterative release of Dynamics 365 for Field Service, supported by other components of the Microsoft Cloud; such as, Bots, IOT and/or Project Service Automation.

The most basic (Level 1) Field Service implementation involves setting up Work Orders, Resources (Field Agents), Scheduling, and creating a process to review and invoice completed work orders.

- **Case Management:** Set up cases to allow for field service. Configure CRM cases to be converted into Work Orders
- **Work Orders:** Accounts, Incidents, Tasks, Products, Services, Statuses and Sub Statuses
- **Resources:** Skills, Territories
- **Scheduling:** Configure Schedule Board, Configure Schedule Assistant
- **Review and Invoicing**
- **Mobile Configuration**

A level 2 implementation involves Agreements and preventative maintenance. Agreements in Field Service are a framework to automatically generate and schedule Work Orders. Agreements are a separate implementation category because customers typically have specific processes for creating, approving, and carrying out Agreements for on-site visits

- **Agreements:** Configure Agreements, Agreement Schedules, and Schedule Dates, Set up Agreement Incidents, Products, Services, and Service Tasks, Configure generation and schedule of Agreement Work Orders, Set up SLAs

A level 3 implementation involves Asset management. In the system this functionality revolves around the "Customer Equipment" entity. Some things to consider are entering manufacturer, model, and serial number into the system and the user experience of adding new customer equipment and relating one or more to a single Work Order or Agreement.

- **Customer Equipment**
- **Asset Management,** Warranty Management, Service History
- **Views and Forms,** Form Rules (Workflows), Sync filters, Auditing, GPS Services

Additional solution components that could be implemented include; Warehousing, Inventory and Product Returns, Purchase Orders. Note: Dynamics 365 for Field Service is not a full ERP solution.

Connected Field Service Implementation would include:

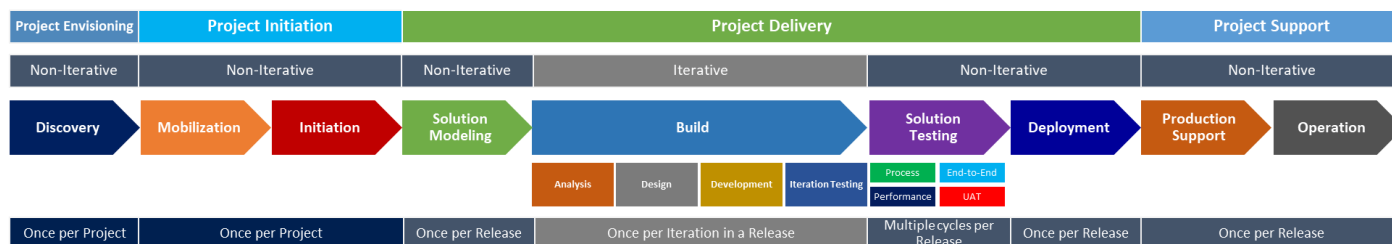
IOT Integration:

- Integration of pre-existing customer IoT sensors with Azure Event Hubs
- Integration of Azure Event Hubs with Dynamics 365 Customer Engagement Instance
- Configuration of rules in the Dynamics 365 Customer Engagement Instance

Dynamics 365 for Operations:

- Sales Orders
- Invoices
- Integration of Sales Order with Dynamics 365 for Customer Engagement

Sure Step 365 Implementation phase will start with a Discovery phase, which will be a 4-8-week engagement to align on as-is and to-be business processes and map their solution fit/gap to the Dynamics 365 product, provide a solution Blueprint and project/programme roadmap. The full scope of implementation would be determined, shaped and agreed with the contracting authority.



3. Service outcomes

The size and shape on the outcomes will be determined by the contracting authorities business requirements, as-is processes and to-be target application model. The key outcomes can be one of the following:

- Pilot candidate release of Dynamics 365 for Field Service
- Level 1 – 3 (as defined above) full implementation of Dynamics 365 for Field Service
- Connected Field Service Implementation of Dynamics 365 for Field Service
- Discovery and Envisioning for Dynamics 365 for Field Service, with associated Solution Blueprint, Programme Roadmap and Fit/Gap.

4. Inputs and prerequisites

The following inputs and prerequisites are typically expected:

- Identify technical resources, partner resources, and additional resources as needed and prepare them to participate in the engagement
- Business Process SME's are made available as planned with the contracting authority.
- Prepare and make required review inputs available; this includes:
 - The latest source code, such as plug-ins, web applications, workflows, and reports.
 - Exported unmanaged solutions (if appropriate)
 - Documents from an existing implementation
- Provide information about external system integration
- Confirm that relevant subject matter experts (SMEs) are available to work with the Microsoft team.
- Participate in information-gathering and assessments, and review activities such as workshops, questionnaires, evaluations, informal meetings, documentation review, and others as required.
- Attend final customer presentation and closeout meeting.
- Provide formal acceptance of the upgrade assessment report.

5. Additional information on Service Features

- Services utilises the Microsoft Industry Solutions Sure Step 365 methodology.
- Determines viability of leveraging Dynamics 365 for Field Service.
- Highlighting areas of feature enhancements, complexities and risk.
- Provides the necessary readiness guidance to maximise success.
- Service reviews existing business processes and to-be target application model.
- Incorporates informal skills transfer.
- Drive a product-first approach, focusing on configuration over customisation.

6. Additional information on Service Benefits

- Replace paper-based Work Order system
- Improve Dispatcher to Field Technician ratio
- Set up mobile application to improve job fulfilment on site
- Implement preventative maintenance system
- Eliminate need to call Field Technicians with updates or cancellations and set up automatic notifications
- Report on Field Technician performance and Work Order metrics

7. Why Microsoft Industry Solutions

Advanced technology is only useful if it helps you succeed, which is why we're focussed on helping you to create unique business value and deliver business outcomes for your organisation, customers and employees. We challenge convention, reimagine the art of the possible and deliver uniquely differentiated services for our customers. With results that demonstrate our ability to lead and deliver the promised value of cloud for customers, Microsoft Industry Solutions are accountable, invested in your success over the long term and focused on helping you address critical, complex business challenges using disruptive technology in innovative new ways for faster realisation of your digital ambitions.

World Class Expertise: We are proud to be a world leader with decades of experience – not just in our technologies but also the Services that support them. Our knowledge, expertise and proven practices underpin the delivery of our consultancy and support services.

Connection with Microsoft Product Groups: At any stage of the design or implementation process, Microsoft Industry Solutions can connect with specific Product Groups and technical communities at the heart of Microsoft. This means we have unique access to the latest developments surrounding our own Microsoft technologies to resolve issues quickly and assist in planning and strategy.

Distinctive Intellectual Property (IP): Microsoft Industry Solutions can draw upon unique IP including frameworks and accelerators developed through hands-on use of our own technology and many worldwide deployments, to accelerate and de-risk the delivery of your solution.

Strong Customer Relationships: We are committed to long-term customer success and have close, intimate relationships with our customers that enable us to support their projects and wider business goals. All our projects are monitored and measured in terms of customer satisfaction, which is a key metric for our delivery teams.

A Relentless Focus on Driving Customer Impact: Through architecture, deployment, adoption and support, ensuring our customers do and achieve more with their investments in Microsoft to help them please their own customers.

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