



Microsoft Dynamics 365 for Field Service

Empowers companies to improve customer satisfaction, first time fix rates, and resource productivity.

“When we chose Dynamics, the winning factor was the Field Service and workforce management capabilities.”

Alvise Vigilante
CEO



Key Benefits

CUSTOMER FIRST

Keep the customer informed during every interaction of the service chain to increase brand loyalty and advocacy.

CONNECTED INTERACTIONS

Provide employees and technicians with 360° information, from any location to improve resource productivity and customer satisfaction.

EMPOWER ORGANIZATIONS

Improve profitability by optimizing schedules and use remote troubleshooting so a technician is dispatched only when necessary.

Key Capabilities

CONTRACT MANAGEMENT

Improve customer satisfaction with reliable service through predictable service delivery. Flexible service schedules can be recurring if needed. Maintain accuracy of service contracts, and installed products across customers, geographies, and locations. Easily meet service expectations and create customer loyalty.

SCHEDULE & DISPATCH OPTIMIZATION

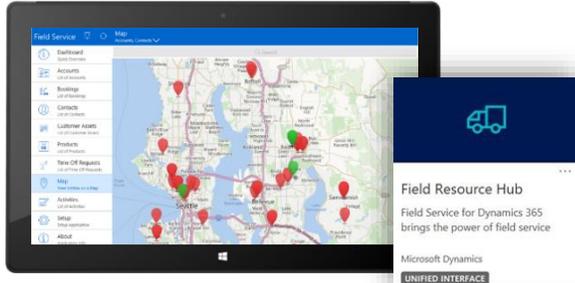
Help your team schedule appointments and dispatch the right resources. Use manual, assisted, or fully automated, optimized scheduling to create the best schedule. Drag and drop and map-enabled scheduling simplifies the time consuming and complex task. It's easy to fit more appointments into each day and ensure the best person is always scheduled.

| ACCOUNT | | | |
|---|---------------------------|--------------------|--------------|
|  | Adventure Works | | |
| Annual Revenue \$450,000,000.00 | No. of Employees 5,800 | Owner* | Veronica Que |
| ✓ Agreement... | Service Account... | Billing Account... | Start ... |
| 00001 | Adventure Works | Northwind Traders | 1/1/2017 |

| Search resources... | | 8:00 AM 9:00 AM 10:00 AM | | |
|---|---------------------------------|---|--|---|
|  | Ashley Chinn 6:07 ☹ 6% |  | Case - Post Work Roof Inspection Duration: 2 hrs 11 min | ✓ |
|  | Bernadette Foley 80:21 ☹ 48% |  | Opportunity - Stadium Walkthrough Duration: 3 hrs | |
|  | Brady Hannon 8:31 ☹ 5% |  | Project - Development Duration: 2 hrs 5 min | |

Active Inventory Adjustments ▾

| Adjustment No ▾ | Warehouse | Owner | Adjusted By Re... |
|-----------------|----------------|---------------|-------------------|
| 00007 | Warehouse West | Lisa Keller | Jamie Redding |
| 00006 | Warehouse East | Lisa Keller | Jamie Redding |
| 00005 | Main | Administra... | Administrator ... |



IoT Alert Associated View ▾

+ ADD NEW IOT ALERT + ADD EXISTING IOT ALERT

- ✓ Description
 - Humidity reading exceeded 70%
 - Wind speed reading exceeded 30 mph
 - Temperature reading exceeded 79 degrees



INVENTORY MANGEMENT

Synchronize inventory, set re-order points and track inventory even down to the truck level to drive efficiency and productivity. Manage your inventory across locations, including warehouses, depots, and trucks. Accurate inventory ensures you can better track your service stock for fewer write-offs, create better forecasts, and improve first time fix rates.

MOBILE

Enable technician productivity with real time and offline information about the customer, case, and even resolution instructions. Work orders are linked to case history, parts information, product configurations, pricing, and more to ensure technicians can solve the problem and keep customers happy.

CONNECTED FIELD SERVICE

Detect, troubleshoot, and resolve issues remotely so a technician is dispatched only when necessary. Know about problems and solve them at minimal cost before customers are aware of the issues. Remote troubleshooting and proactive problem solving help improve customer satisfaction and resource productivity.

CUSTOMER-CENTRIC EXPERIENCE

Give customers a complete view of upcoming and past cases through a customer portal, share a photo and live map of their technician en route, and send updates via SMS and phone call. Keep your customers informed by putting them at the center of all service interactions.

Dynamics 365

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

Better Together

Sales: Technicians can identify and create opportunities in the field for sales teams.

Project Service Automation: Use the same resource pool for short or long-term projects.

Customer Service: Accept customer concern calls through phone, email, social, or chat.

Finance and Operations: Automate warehouse processes and streamline customer billing.

Marketing: Technicians can update customer information to deliver more personalized content.

Talent: Identify and engage right people with right skills.

For more information, visit: <https://www.microsoft.com/en-us/dynamics365/field-service>

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