



Service Management and Field Service



Gemma Mooney

Business Central

Lead Functional Consultant



Peter Norman

Head of CRM Presales

What is Service Management in BC?

- Repairs and maintenance
- Warranty
- Contracts for repairs or maintenance
- Internal
- Invoicing, Costs, Inventory, GL
- Financial reporting

Cronus UD Ltd.

Service Management

Posted Documents

All Reports



Loaners

Customers

Service Items

Items

Item Journals

Requisition Worksheets



Good afternoon, Alex Wilber!

+ Service Contract Quote

+ Service Contract

+ Service Quote

+ Service Order

+ Sales Order

+ Transfer Order

> Tasks

> Administration

> History

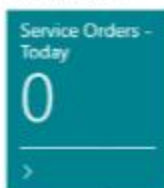
Service

Profit

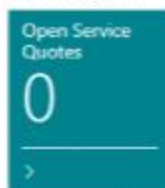


Activities

Service Orders



Service Quotes

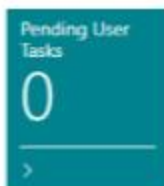


Service Contracts



User Tasks

My User Tasks



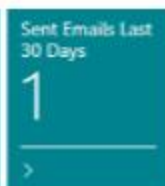
Job Queue Tasks

Job Queue Tasks



Email Status

Email Activities



Approvals

Pending Approvals



Self-Service

Current Time Sheet

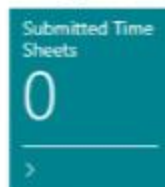


Open My Curre... Sheet

Time Sheets



Pending Time Sheets



Service Orders



Service Order



✓ Saved



SVO000004 · Trey Research

Notifications: 2 This customer has an overdue balance. | The customer's credit limit has been exceeded.

Home Order More options

Post... Archive Document Release to Ship... Print... Create Warehouse Shipment

General

Show more

No. SVO000004

Description

Customer No. 20000

Contact No. CT000016

Sell-To

Name Trey Research

Address Southwark Bridge Rd, 91-95

City London

County

Postcode SE1 0AX

Country/Region Code GB

Contact Name Helen Ray

Phone No.

Email helen.ray@contoso.com

Service Order Type

Contract No.

Response Date 04/06/2025

Response Time 10:14:33

Priority Low

Status Pending

Release Status Open

Lines Manage Line Functions Order

Resource Allocations Service Item Worksheet Troubleshooting Fault/Resol. Codes Relationships Dimensions Comments Service Item Log

Service Item No.	Item No.	Service Item Group Code	Serial No.	Description	Repair Status Code	War...	Contract No.	Service Price Group Code	Fault Code	Resolution Code	Priority
→	S-100	SERVICE		S-100 Semi-Automatic Coffee ...	INITIAL	<input type="checkbox"/>					Low

Details Attachments (0)

Document Check



Refresh

Issues

No issues found.

Incoming Document Files

Name	File Ex
(There is nothing to show in this view)	

Sell-to Customer Service His...

Customer No. 20000



Service Order

SVO000004 · Trey Research

Notifications: 2 *This customer has an overdue balance.*

Home | Order | More options

Post... | Archive Document | Release to S...

General

No.	SVO000004
Description	
Customer No.	20000
Contact No.	CT000016
Sell-To	
Name	Trey Research
Address	Southwark Bridge
City	London
County	
Postcode	SE1 0AX
Country/Region Code	GB
Contact Name	Helen Ray

Lines | Manage | Line | Functions | Order

Resource Allocations | Service Item Worksheet

Service Item No.	Item No.	Service Item Group Code
→	S-100	SERVICE

Service Item Group SERVICE - Troubleshoot...

ON/OFF

Related | Automate

General

No. ON/OFF Description Have you tried turning it off an...

Lines

New Line | Delete Line

Comment
→ Have you tried turning it off and on again?

✓ Saved

Document Check

Issues Total: 0

Refresh

No issues found.

Incoming Document Files

(There is nothing to show in this view)

Sell-to Customer Service History

Customer No. 20000

0	1	0
---	---	---

Service Order

Fault/Resolution Codes Relationships

General

Service Item Group SERVICE

Fault Area Code

Symptom Code

Fault Code

Manage

Fault Area Code	Symptom Code	Fault Code ↓	Resolution Code	Service Item Group Code ↓ ▼	Description	
		NOISE	5-2	R2	SERVICE	Clean and great the brew group as described in Maintenance manu... 0
		NOISE	5-1	R1	SERVICE	Clean the coffee funnel clean the coffee funnel in Maintenance ma... 0
		LEAKING	3-2	R6	SERVICE	Filter basket needs replacement 0
		LEAKING	3-1	R5	SERVICE	Clean out waste box and waste pipe as described in Maintenance ... 0
		ERROR	1-9		SERVICE	0
		ERROR	1-3	R4	SERVICE	Turn off the machine and wait for 60 minutes 0
		ERROR	1-2	R2	SERVICE	Clean and great the brew group as described in Maintenance manu... 0
→		⋮ ERROR	1-1	R1	SERVICE	Clean the coffee funnel clean the coffee funnel in Maintenance ma... 0

Code ↑	Description
ERROR	Alarm light/message
LEAKING	Leaking
NOISE	Loud noise
+ New	
Show details	
Select from full list	

Close



Service Order



✓ Saved



SVO000004 · Trey Research

[Home](#) | [Order](#) | [More options](#)[Post...](#) | [Archive Document](#) | [Release to Ship](#) | [Print...](#) | [Create Warehouse Shipment](#)

General

[Show more](#)

Description		Phone No.	
Customer No.	20000	Email	helen.ray@contoso.com
Contact No.	CT000016	Service Order Type	
Sell-To		Contract No.	
Name	Trey Research	Response Date	04/06/2025
Address	Southwark Bridge Rd, 91-95	Response Time	10:14:33
City	London	Priority	Low
County		Status	Pending
Postcode	SE1 0AX	Release Status	Open
Country/Region Code	GB		
Contact Name	Helen Ray		

[Lines](#) | [Manage](#) | [Line](#) | [Functions](#) | [Order](#)[Resource Allocations](#) | [Service Item Worksheet](#) | [Troubleshooting](#) | [Fault/Resol. Codes Relationships](#) | [Dimensions](#) | [Comments](#) | [Service Item Log](#)

Service Item No.	Item No.	Service Item Group Code	Serial No.	Description	Repair Status Code	War...	Contract No.	Service Price Group Code	Fault Code	Resolution Code	Priority
→	S-100	SERVICE		S-100 Semi-Automatic Coffee ...	INITIAL	<input type="checkbox"/>			S-2	R2	Low

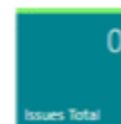
Invoicing >

20000 14 DAYS 18/06/2025

Summary

[Preview](#)[Details](#) | [Attachments \(0\)](#)

Document Check

[Refresh](#)

Issues

No issues found.

Incoming Document Files

Name	File Ex
(There is nothing to show in this view)	

Sell-to Customer Service His...

Customer No. 20000

0 1 0

Cronus UD Ltd.

Service Management

Posted Documents

All Reports



Loaners

Customers

Service Items

Items

Item Journals

Requisition Worksheets



Headline

Good morning, Alex Wilber!

Actions

+ Service Contract Quote

+ Service Contract

+ Service Quote

+ Service Order

> Tasks

+ Service Tasks

Service

Profit

View or edit service task information, such as service order number, service item description, repair status, and service item. You can print a list of the service tasks that have been entered.

Create Contract Invoices

Post Prepaid Contract Entries

Order Planning

Activities

Service Orders

Service Orders -
Today

4

>

Service Orders -
in Process

0

>

Service Orders -
Finished

0

>

Service Orders -
Inactive

4

>

Service Quotes

Open Service
Quotes

0

>

Service Contracts

Open Service ...
Quotes

0

>

Service Contra...
to Expire

0

>

User Tasks

My User Tasks

Pending User
Tasks

0

>

Job Queue Tasks

Job Queue Tasks

Tasks Failed

0

>

Tasks In
Process

0

>

Tasks In Queue

2

>

Email Status

Email Activities

Failed Emails in
Outbox

0

>

Draft Emails in
Outbox

0

>

Sent Emails Last
30 Days

1

>

Approvals

Pending Approvals

Requests Sent ...
Approval

0

>

Requests to
Approve

0

>

Self-Service

Current Time Sheet



Open My Curre...
Sheet

Time Sheets

New Time Sheets

0

>

Time Sheets In
progress

0

>

Pending Time Sheets

Submitted Time
Sheets

0

>

Rejected Time
Sheets

0

>

Approved Time
Sheets

0

>



Service Tasks

✓ Saved



General

Resource Filter



Document Filter

Order



Resource Group Filter



No. Filter



Response Date Filter

Repair Status Code Filter



Allocation Status Filter



Manage



Show Document



Item Worksheet

More options



	Response Date ↑		Response Time ↑	Priority ↑	Document Type	Document No.	Repair Status Code	Service Item No.	Customer No.	Service Shelf No.	Item No.	Service Item Group Code	Serial No.	Warra...	Contract No.	No. of Allocations
→	04/06/2025	:	09:36:41	Low	Order	SVO000003	INITIAL		10000		S-100	SERVICE	-	<input type="checkbox"/>		1
	04/06/2025		10:14:33	Low	Order	SVO000004	INITIAL		20000		S-100	SERVICE	-	<input type="checkbox"/>		1
	04/06/2025		10:30:41	Low	Order	SVO000005	INITIAL		40000		S-210		-	<input type="checkbox"/>		1



Service Item Worksheet



✓ Saved



S-100 S-100 Semi-Automatic Coffee Machine

[Print...](#) [Adjust Service Price](#) [Fault/Resol. Codes Relationships](#) [Demand Overview](#) [Troubleshooting](#) | [More options](#)

General >

Lines | Manage | Functions | Line[New Line](#) [Delete Line](#) [Select items...](#)

Type	No.	Item Reference No.	Description	Location Code	Unit of Measure Code	Quantity	Fault Reason Code	Fault Area Code	Symptom Code	Fault Code	Resolution Code	Unit Price Excl. VAT	Line Discount %	Line Discount Amount
Item		SP-BOM1102	Coffee filter basket		PCS	1			NOISE	5-2	R2	35.00	0	0.00
Item		SER102	Repair		HOUR	2			NOISE	5-2	R2	100.00	0	0.00
→ Item						0			NOISE	5-2	R2	0.00	0	0.00

Item

Resource

Cost

G/L Account

Cust

Shipping >

Details >



Service Item Worksheet



✓ Saved



S-100 S-100 Semi-Automatic Coffee Machine



Print...



Adjust Service Price



Fault/Resol. Codes Relationships



Demand Overview



Troubleshooting

More options

General

Document No.	SVO000004	Service Shelf No.	
Service Item No.		Service Price Group Code	
Item No.	S-100	Fault Area Code	
Service Item Group Code	SERVICE	Symptom Code	NOISE
Serial No.		Fault Code	S-2
Fault Reason Code		Resolution Code	R2
Document Type	Order	Repair Status Code	FINISHED
Loaner No.			

Lines | Manage | Functions | Line

New Line



Delete Line



Select items...



Type	No.	Item Reference No.	Description	Location Code	Unit of Measure Code	Quantity	Fault Reason Code	Fault Area Code	Symptom Code	Fault Code	Resolution Code	Unit Price Excl. VAT	Line Discount %	Line Disco Amo
→ Item	:	SP-BOM1102	Coffee filter basket		PCS	1			NOISE	S-2	R2	35.00	0	0
Item		SER102	Repair		HOUR	2			NOISE	S-2	R2	100.00	0	0

Customer >

Shipping >

Details >



Cronus UD Ltd.

Service Management

Posted Documents

All Reports



Loaners

Customers

Service Items

Items

Item Journals

Requisition Worksheets

50



Headline

Good morning, Alex Wilber!

Actions

+ Service Contract Quote

+ Service Order

> Tasks

Service

+ Service Contract

+ Sales Order

> Administration

Profit

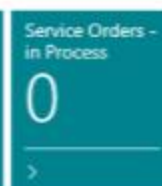
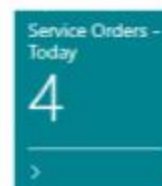
+ Service Quote

+ Transfer Order

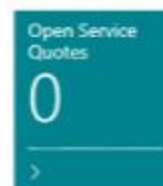
> History

Activities

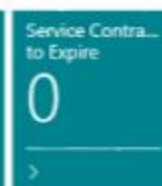
Service Orders



Service Quotes

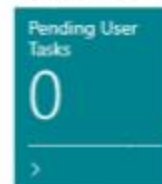


Service Contracts



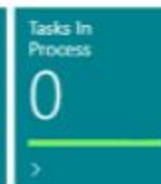
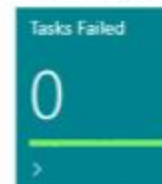
User Tasks

My User Tasks



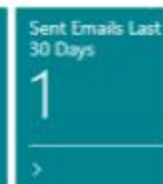
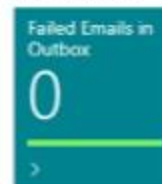
Job Queue Tasks

Job Queue Tasks



Email Status

Email Activities



Approvals

Pending Approvals



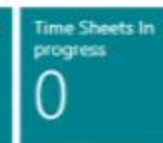
Self-Service

Current Time Sheet

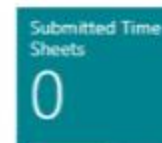


Open My Curre... Sheet

Time Sheets



Pending Time Sheets



No. ↑	Status ▼	Order Date	Order Time	Customer No.	Ship-to Code	Name	External Document No.	Location Code	Response Date	Response Time	Priority	Release Status
SVC0000004	Finished	04/06/2025	10:14:33	20000	ELEET	Trey Research			04/06/2025	10:14:33	Low	Open

Details Attachments (0)

Customer Statistics

Customer No.	20000
Balance (LCY)	3,788.03
Balance (LCY) As Vendor	0.00

Sales

Outstanding Orders (LCY)	0.00
Shipped Not Invoiced (LCY)	0.00
Outstanding Invoices (LCY)	1,797.78

Service

Outstanding Serv. Orders (LCY)	282.00
Serv Shipped Not Invoiced (LCY)	0.00
Outstanding Serv. Invoices (LCY)	0.00

Payments

Payments (LCY)	54,354.12
Refunds (LCY)	0.00
Last Payment Receipt Date	04/06/2025

Total (LCY)	5,867.81
Credit Limit (LCY)	2,500.00
Overdue Amounts (LCY)	2,784.12
Total Sales (LCY)	7,834.89
Invoiced Prepayment Amount	0.00

Customer Details

Customer No.	20000
Name	Trey Research
Phone No.	
Email	helen.ray@contoso.com

- ☒ Ship
- ☐ Invoice
- ☒ Ship and Invoice
- ☐ Ship and Consume

OK

Cancel



Posted Service Invoice



PSVI000003 · Trey Research

[Home](#)[Print/Send](#)[Invoice](#)[More options](#)[Update Document](#)[Find entries...](#)

General

[Show more](#)

No.	PSVI000003	Posting Date	04/06/2025
Customer No.	20000	VAT Date	04/06/2025
Contact No.	CT000016	Document Date	04/06/2025
Sell-to		Quote No.	
Name	Trey Research	Order No.	SVO000004
Address	Southwark Bridge Rd, 91-95	Pre-Assigned No.	
Address 2		Salesperson Code	JO
City	London	Responsibility Centre	
County		No. Printed	0
Postcode	SE1 0AX		
Country/Region Code	GB		
Contact Name	Helen Ray		

Lines [Manage](#) Line[New Line](#) [Delete Line](#)

Type	No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Service Item No.	Department Code	Cus Cod
→ Item		SP-BQM1102	Coffee filter basket	1	PCS	35.00		35.00		SALES	ME
Item		SER102	Repair	2	HOUR	100.00		200.00		SALES	ME

Summary

[Preview](#)[Details](#)[Attachments \(0\)](#)

Incoming Document Files

Name File Extension

(There is nothing to show in this view)



Warranty



Service Item Card



✓ Saved



SV000003 · S-100 Semi-Automatic Coffee Machine

Item Troubleshooting More options

General

No.	SV000003	Response Time (Hours)	
Description	S-100 Semi-Automatic Coffee Machine	Priority	Low
Item No.	S-100	Last Service Date	
Item Description	S-100 Semi-Automatic Coffee Machine	Warranty Starting Date (Parts)	04/06/2025
Service Item Group Code	SERVICE	Warranty Ending Date (Parts)	04/06/2027
Service Price Group Code		Warranty % (Parts)	100
Variant Code		Warranty Starting Date (Labour)	04/06/2025
Serial No.		Warranty Ending Date (Labour)	04/06/2027
Status	Installed	Warranty % (Labour)	100
Service Item Components	No	Preferred Resource	
Search Description	S-100 SEMI-AUTOMATIC COFFEE MACHINE	Blocked	

Customer

Customer No.	40000	Phone No.	
Sell-to		Location of Service Item	
Name	Alpine Ski House		
Address	Walter-Grupius-Strasse 5		
Address 2	Park Stadt Schwabing		
City	Munchen		
Postcode	DE-80807		
Country/Region Code	DE		

Summary

Preview

Details Attachments (1)

Customer Details

Customer No. 40000
Name Alpine Ski House
Phone No.
Email ian.deberry@contoso.com
Fax No.
Credit Limit (LCY) 0.00
Available Credit (LCY) 0.00
Payment Terms Code 1M(8D)
Contact Ian Deberry

Service Order

✓ Saved

Service Item Worksheet - SV000002 Airpot Coffee Machine

Print... Adjust Service Price Fault/Resol. Codes Relationships Demand Overview Troubleshooting Page More options

General

Document No.	SVO000006	Service Shelf No.	
Service Item No.	SV000002	Service Price Group Code	
Item No.	SP-SCM1009	Fault Area Code	
Service Item Group Code	SERVICE	Symptom Code	
Serial No.		Fault Code	
Fault Reason Code		Resolution Code	
Document Type	Order	Repair Status Code	INITIAL
Loaner No.			

Lines Manage Functions Line

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Code	Unit of Measure Code	Quantity	Fault Reason Code	Fault Area Code	Symptom Code	Fault Code	Resol. Code	Unit Price Excl. VAT	Line Discount %	Line Discount Amount	Line Discount Type	Line Amount Excl. VAT
→ Item	SP-BOM1102		Coffee filter basket		PCS	1	DEFECT					40.00	100	40.00	Warranty Disc.	0.00
Resource	LINA		Lina Townsend		HOUR	1						120.00	100	120.00	Warranty Disc.	0.00

Customer >

Shipping >

Details

Close

Service Contracts



Service Contract

[Home](#) [Prepare](#) [Print/Send](#) [Contract](#) [Report](#) | [More options](#)[Open Contract](#) [Lock Contract](#) [Sign Contract](#)

General

Contract No.	
Description	
Customer No.	
Contact No.	
Name	
Address	
Address 2	
City	
County	
Postcode	
Country/Region Code	
Contact Name	

Lines [Manage](#) [Line](#)[New Line](#) [Delete Line](#) [Select service items...](#)

Service Item No.	Description	Unit of Measure
→		

Service Contract Templates



+ New



No. ↑	Description	Prepaid	Serv. Contract Acc. Gr. Code	Invoice Period
→ TEMPL0001	Prepaid Contract - Monthly	<input checked="" type="checkbox"/>	BASIC	Month
TEMPL0002	Prepaid Contract - Quarterly	<input checked="" type="checkbox"/>	BASIC	Quarter
TEMPL0003	Non-Prepaid Contract - Monthly	<input type="checkbox"/>	BASIC	Month

OK

Cancel

[Details](#) [Attachments \(0\)](#)

Customer Statistics

Customer No.	-
Balance (LCY)	-
Balance (LCY) As Vendor	0.00

Sales

Outstanding Orders (LCY)	-
Shipped Not Invoiced (LCY)	-
Outstanding Invoices (LCY)	-

Service

Outstanding Serv. Orders (LCY)	-
Serv Shipped Not Invoiced (LCY)	-
Outstanding Serv. Invoices (LCY)	-

Payments

Payments (LCY)	-
Refunds (LCY)	-
Last Payment Received (LCY)	-

Total (LCY)	0.00
Credit Limit (LCY)	-
Overdue Amounts (LCY)	0.00
Total Sales (LCY)	0.00
Invoiced Prepayment (LCY)	0.00

Customer Details

Customer No.	-
Name	-



Service Contract



✓ Saved



SVC000001 · Prepaid Contract - Monthly

✕ This customer has an overdue balance. [Show details](#)[Home](#) [Prepare](#) [Print/Send](#) [Contract](#) [Report](#) | [More options](#)[Open Contract](#) [Lock Contract](#) [Sign Contract](#) [Create Service Invoice](#) [Create Service Credit Memo](#)

General >

SVC000001 40000 01/01/2025 Signed

Lines [Manage](#) Line[New Line](#) [Delete Line](#) [Select service items...](#)

Service Item No.	Description	Unit of Measure Code	Serial No.	Item No.	Response Time (Hours)	Line Cost	Line Value	Line Disc. %	Line Amount	Profit	Service Period	Next Planned Service Date	Starting Date	Contract Expiration Date	Credit Memo Date	New Line
→ SV000002	Airpot Coffee Machine	PCS		SP-SCM1009	24	400.00	1,200.00		1,200.00	800.00	3M	01/01/2025	01/01/2025	31/12/2025	31/12/2025	<input type="checkbox"/>

I

Invoicing >

40000 1M(8D)

Shipping >

DE-80807

Service

Service Zone Code



Response Time (Hours) 24

Service Period 3M

Service Order Type MAINTEN

First Service Date 01/01/2025

Invoice Details

Annual Amount 1,200.00

Automatic Credit Memos





Service Contract



✓ Saved



SVC000001 · Prepaid Contract - Monthly

✕ This customer has an overdue balance. [Show details](#)[Home](#) [Prepare](#) [Print/Send](#) [Contract](#) [Report](#) | [More options](#)[Open Contract](#) [Lock Contract](#) [Sign Contract](#) [Create Service Invoice](#) [Create Service Credit Memo](#)

Service

Service Zone Code

Service Period

First Service Date

Response Time (Hours)

Service Order Type

Invoice Details

Annual Amount

Allow Unbalanced Amounts ☐

Calcd. Annual Amount

Invoice Period

Next Invoice Date

Amount per Period

Next Invoice Period

Last Invoice Date

Prepaid ☒

Automatic Credit Memos ☐

Invoice after Service ☐

Combine Invoices ☐

Contract Lines on Invoice ☐

No. of Unposted Invoices

No. of Unposted Credit Memos

No. of Posted Invoices

No. of Posted Credit Memos

Price Update >

04/06/2025

Details >



Cronus UD Ltd.

Service Management

Posted Documents

All Reports



Loaners

Customers

Service Items

Items

Item Journals

Requisition Worksheets

50



Headline

Hi, Alex Wilber!



Activities

Actions

+ Service Contract Quote

+ Service Contract

+ Service Quote

+ Service Order

> Tasks

+ Service Tasks

+ Create Contract Service Orders

+ Create Contract Invoices

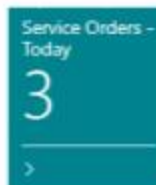
+ Post Prepaid Contract Entries

+ Order Planning

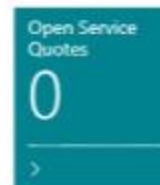
+ Service

+ Profit

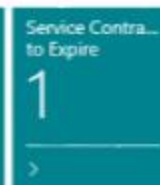
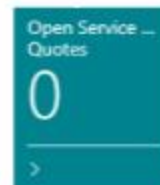
Service Orders



Service Quotes

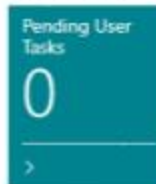


Service Contracts



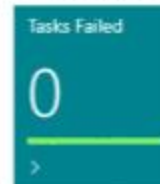
User Tasks

My User Tasks



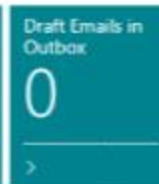
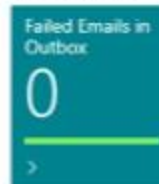
Job Queue Tasks

Job Queue Tasks



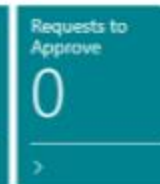
Email Status

Email Activities



Approvals

Pending Approvals



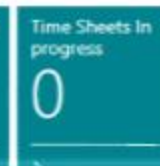
Self-Service

Current Time Sheet



Open My Curre... Sheet

Time Sheets



Pending Time Sheets



Cronus UD Ltd. | Service Management | Posted Documents | All Reports

Loaners | Customers | Service Items | Items | Item Journals | Requisition Worksheets

Headline

Hi, Alex Wilber!

Actions

• ○

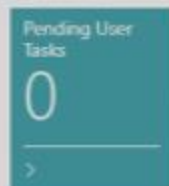
Activities

Service Orders



User Tasks

My User Tasks



Job Queue Tasks

Job Queue Tasks



Self-Service

Current Time Sheet



Open My Current Sheet

Time Sheets



Pending Time Sheets



Create Contract Service Orders

Options

Starting Date 05/05/2025

Ending Date 09/05/2025

Action Create Service Order

Filter: Service Contract Header

× Contract No.

+ Filter...

Filter totals by:

+ Filter...

Filter: Service Contract Line

+ Filter...

Schedule...

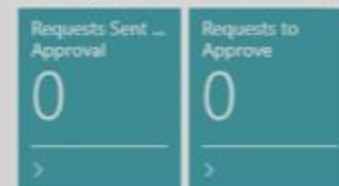
OK

Cancel

Order > Tasks | Service
Order > Administration | Profit
Order > History

Approvals

Pending Approvals



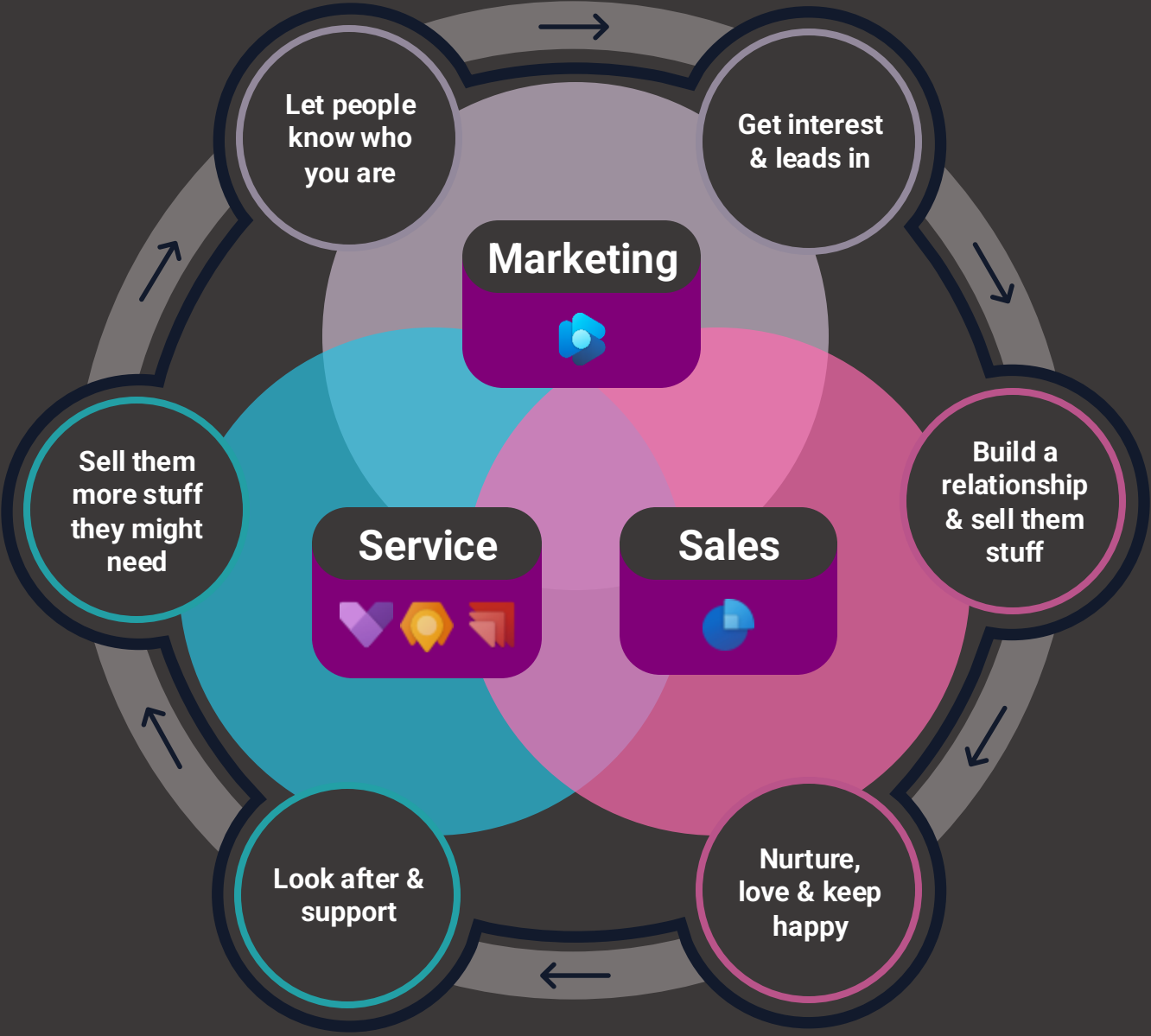
What is Service Management not great at?

Off site work

Scheduling

Aftercare

Customer Engagement



Service



365 Customer Service



365 Field Service



365 Project Operations

What is Field Service

Frontline / mobile workers
External to the office
Travel
Scheduling
Work Completion
Invoicing



Work Order

Consulting

Upgrades

Testing

Deliveries

Installation

Repair

Maintenance

Asset tracking

Monitoring

Safety



Work Order

Visit

Meeting

Calibration

On-site support

Service

Carer

Inspection

Training

Drop in

Remote support



Work Order

Service location

Billing

Type of work

Characteristics

Dynamics 365Field Service

Search

Home

Recent

Pinned

Work

Get started

Dashboards

Scheduling

Work orders

Schedule board

Bookings

Resource requirements

Requirement groups

Time off requests

Time entries

Customers

Accounts

Contacts

Service delivery

Cases

11084Saved

Work order

1 dayActive for

Contoso Ltd.Service account

General

Products and services

Tasks

Reference

Timeline

Related

Details

Status

Unscheduled

Priority

High

Service account

Contoso Ltd.

Work order type

Diagnose and repair

Incident type

HVAC full system diagnosis an...

Trade

Electrical

Agreement

3 year HVAC maintenance

Summary

Assess the ductwork, air handler, coils, heat pump, and thermostats. Run all firmware upgrades. Replace filters over 6 months old.
Conduct repairs as needed and under NTE. Quote approval required

Account instructions

Maintenance entrance is located on alley between NE 80th St. and Cleveland St. Call via keypad to enter

Copilot

This work order was created on Apr 16, 2024 when Mica Pereira reported unusual noise from the HVAC-B6-002 ductwork.
Several notes have been added with photos from the customer showing where the problem is heard. There is also a note from Mona Kane that outlines the suspected cause as the recirculator fan and recommends diagnosis starts there.
Please review before using to ensure this AI-generated content is accurate, complete, and appropriate.
[Learn more](#) [Terms](#)

Re-generate summary

Booking suggestions

David SoHVAC Technician

Wed Apr 17, 2024

10:00 AM–12:00 PM

20min travel time

Maricel BautistaHVAC Technician

Wed Apr 17, 2024

3:00 PM–5:00 PM

Copilot

Hi Molly,
Ready to explore? Select one of the suggestions below to get started...

Analyze

How many Work orders are there?

Ask

What are my Accounts?

Act

Navigate to Bookings

when was the last work order for HVAC-B6-002

Copilot10:35 a.m.

Work order 11051 was completed on Jan 8th, 2024 [Reference](#)

AI generated content may be incorrect

summarize work order 11051

Working on it...

Stop generating

Ask a question about the data in this app,



Work Order

Service location

Billing

Type of work

Characteristics

The screenshot displays the Microsoft Outlook application interface. The left sidebar shows the 'Inbox' with 14 items. The main pane shows an email thread titled 'HVAC Repair Needed - URGENT' from Claudia Mazzanti to Molly Clark. The email content discusses an HVAC repair issue and requests a tech out ASAP. The right sidebar shows the 'Field Service' panel with a 'Review the work order' section and a 'Create work order' form. The form includes fields for Priority (Urgent), Service account (Fabrikam, Inc.), Work order type (Repair), Incident type (HVAC repair), and Price list (USD). A summary section at the bottom of the form provides a brief overview of the work order details.

Field Service PREVIEW

Review the work order
Please review before saving to ensure all AI-generated content is accurate, complete, and appropriate. [Learn more](#)
Leave feedback on the content

Create work order

Priority
Urgent

Service account *
Fabrikam, Inc.

Work order type *
Repair

Incident type
HVAC repair

Price list *
USD

Summary
Claudia Mazzanti from Fabrikam, Inc. requested an HVAC repair due to strange sounds. The HVAC is now offline and needs to be fixed as soon as possible. ETA is to be determined.
AI-generated content may be incorrect

Time promised (from)



Work Order



Scheduling

Skills

Availability

Location (territory)

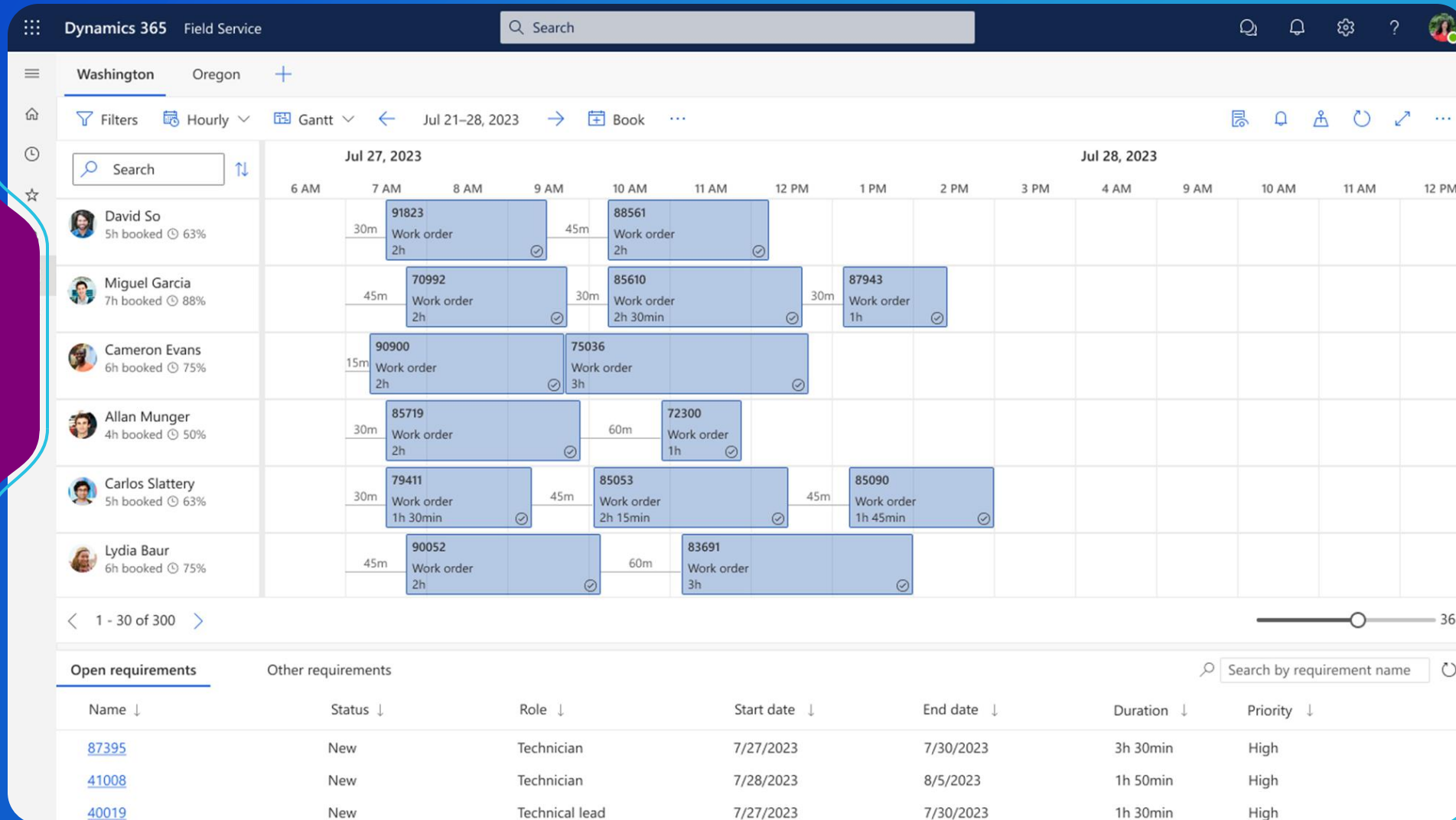
Travel time

Priority

Optimisation



365 Field Service





Work Order



Scheduling

Skills


Availability

Location (territory)

Travel time

Priority


Optimisation

 Contoso Coffee

Please follow steps below to schedule your service visit. If requiring emergency service outside of available times, please reach out to Contoso customer support [555-555-01234](tel:555-555-01234).

1 Service product
 Rancilio Silvia espresso machine

2 Service type
 Monthly Silvia maintenance package


 12345 NE Turing St, Suit 202
 Seattle, WA 98109

3 Select date and time
 < > December 2020

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Time available


9:00 am	9:30 am	10:00 am
10:00 am	11:00 am	11:30 am
12:00 pm	12:30 pm	01:30 pm
02:00 pm	02:30 pm	03:00 pm
03:30 pm	02:30 pm	03:00 pm
04:30 pm	05:00 pm	

 Contoso Coffee

Please follow steps below to schedule your service visit. If requiring emergency service outside of available times, please reach out to Contoso customer support [239-555-0108](tel:239-555-0108).

1 Service product
 Rancilio Silvia espresso machine

2 Service type
 Monthly Silvia maintenance package

 12345 NE Turing St, Suit 202
 Seattle, WA 98109

3 Select date and time
 < > December 2020

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8



Work Order

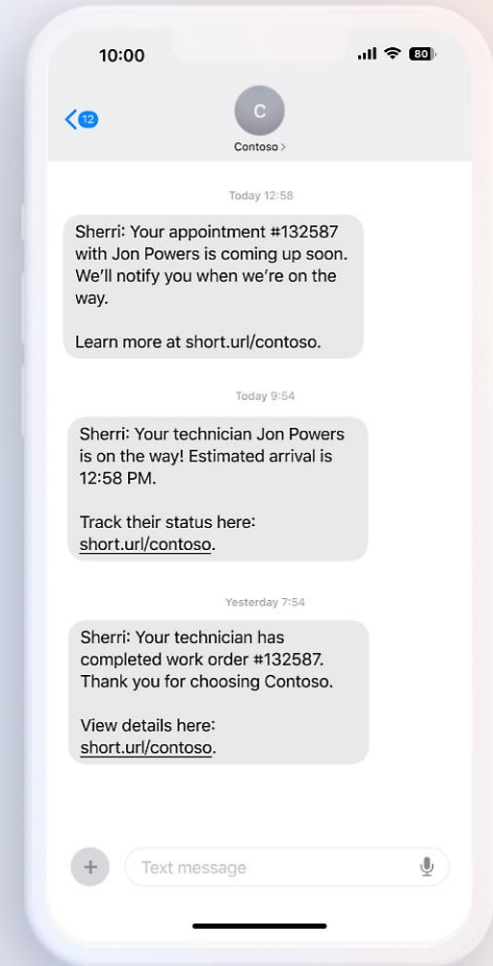
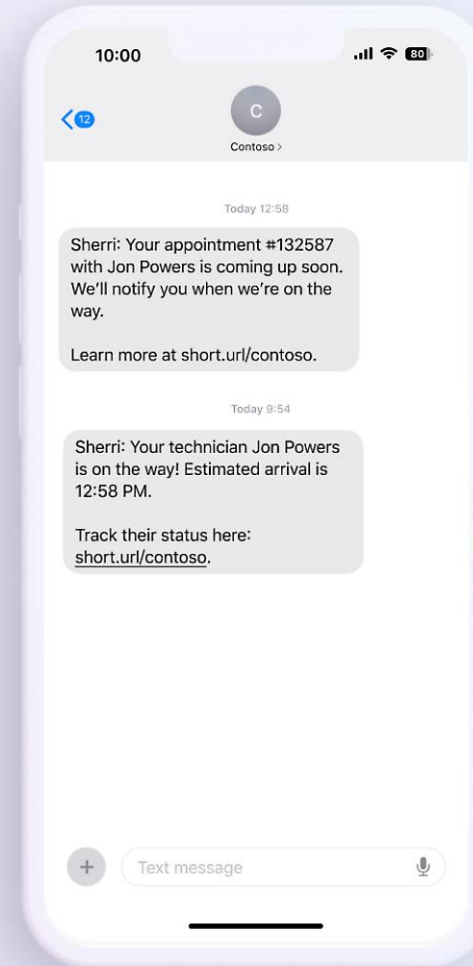
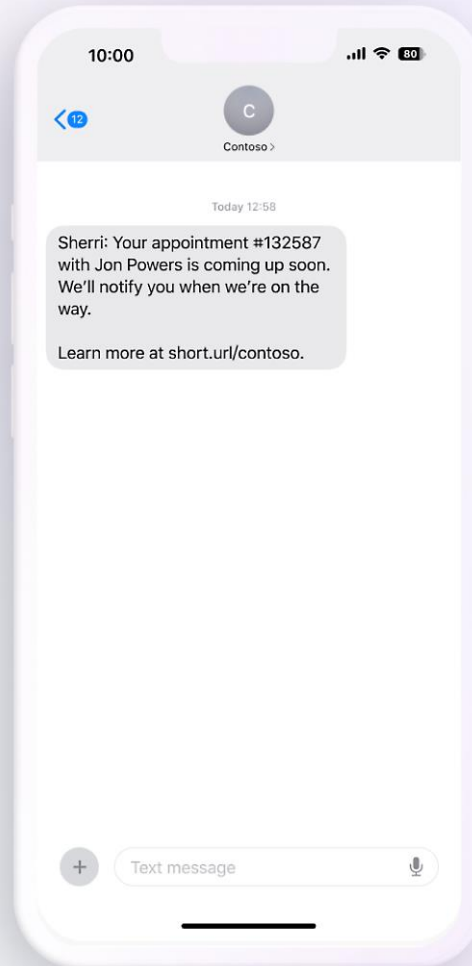


Scheduling



Dispatch

Communication
Customer, Frontline
worker & Scheduler





Work Order





Scheduling




Dispatch

Communication
Customer, Frontline
worker & Scheduler





Your technician is here
David arrived at 6:59 AM




David So
Your technician

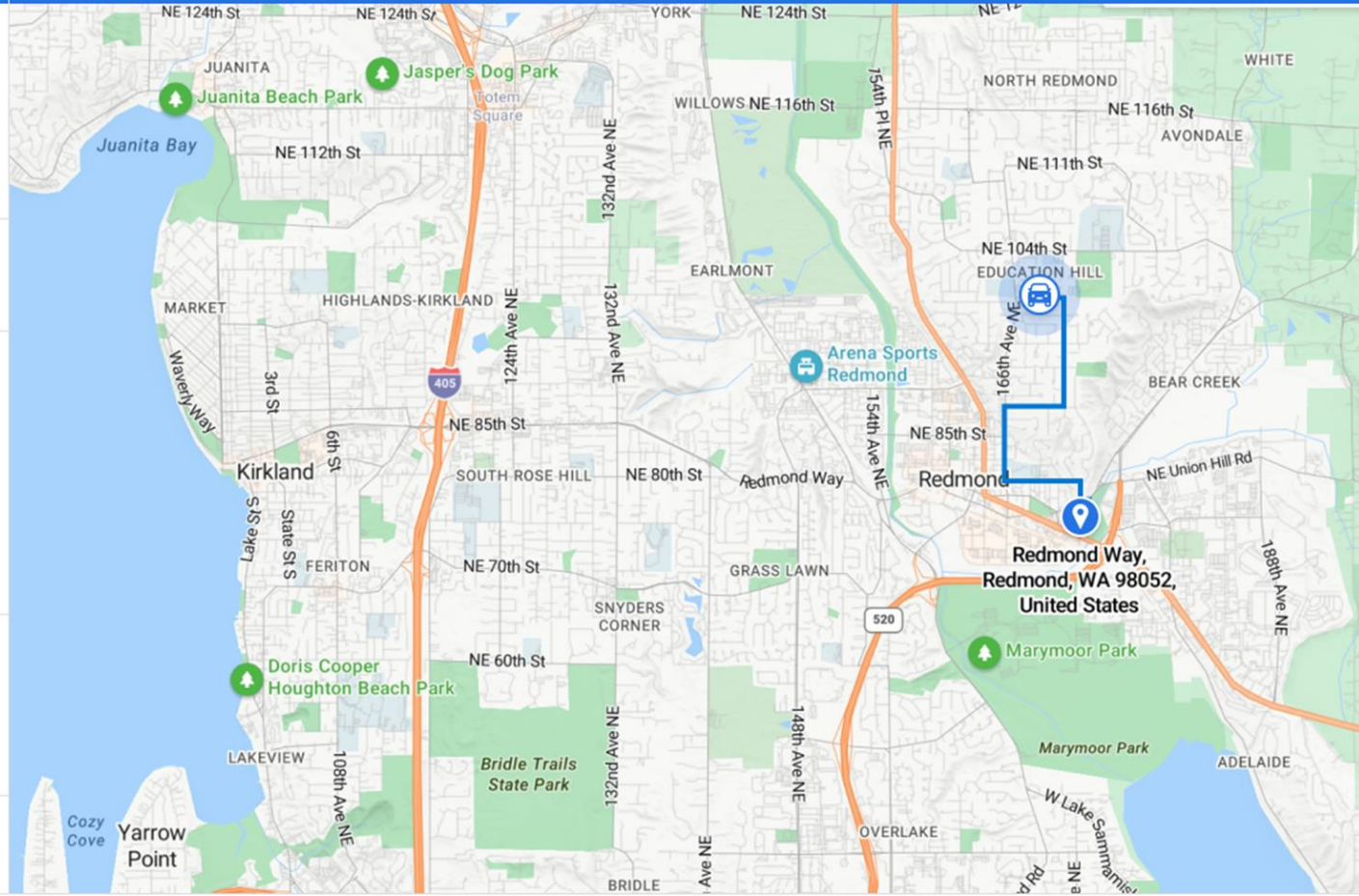
Appointment #91823

Thursday, July 27
7:00 AM

2501 Redmond Way
Redmond, Washington 98163



Contact us
(239) 555-0108
support@contoso.com



© Contoso • Powered by Microsoft



Work Order



Scheduling

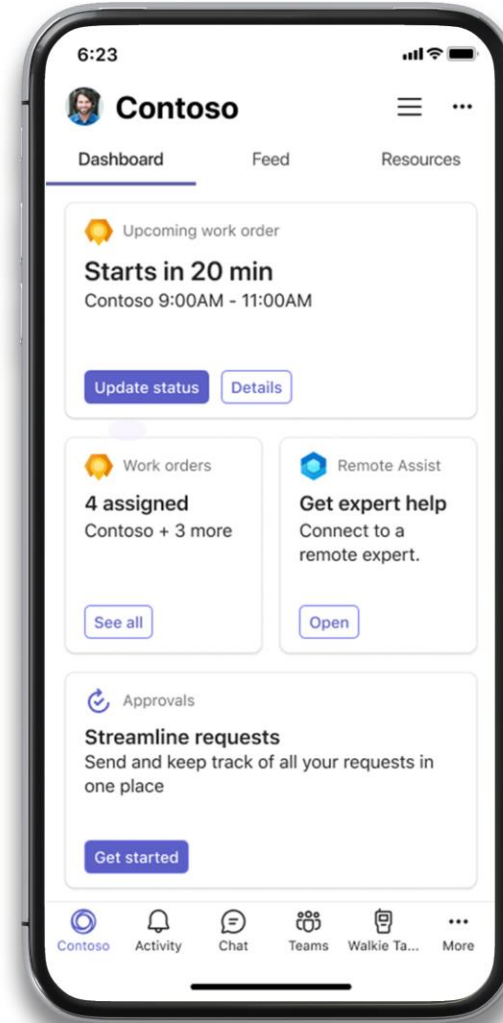


Dispatch



Service

- Mobile App
- Inspections
 - Guides
- Knowledge Base
- Remote Assist





Work Order



Scheduling

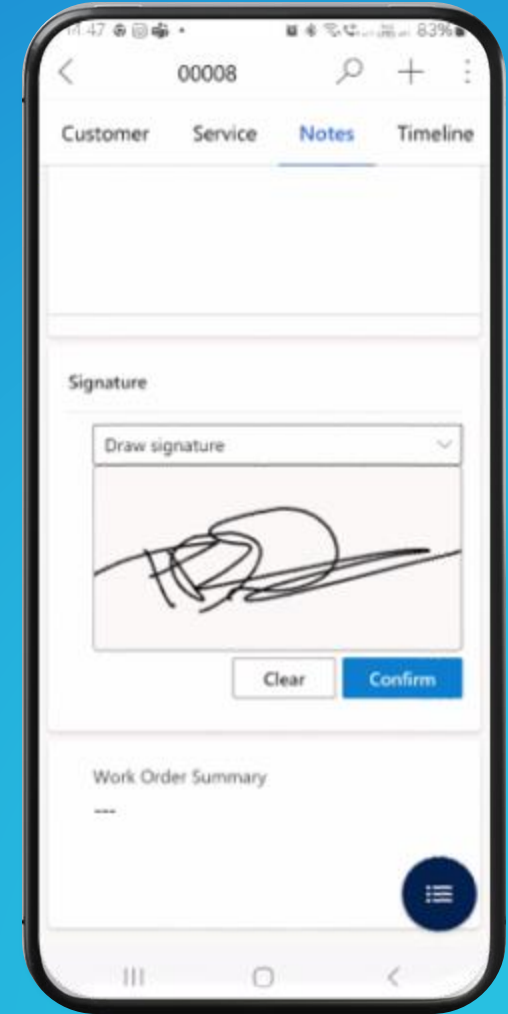
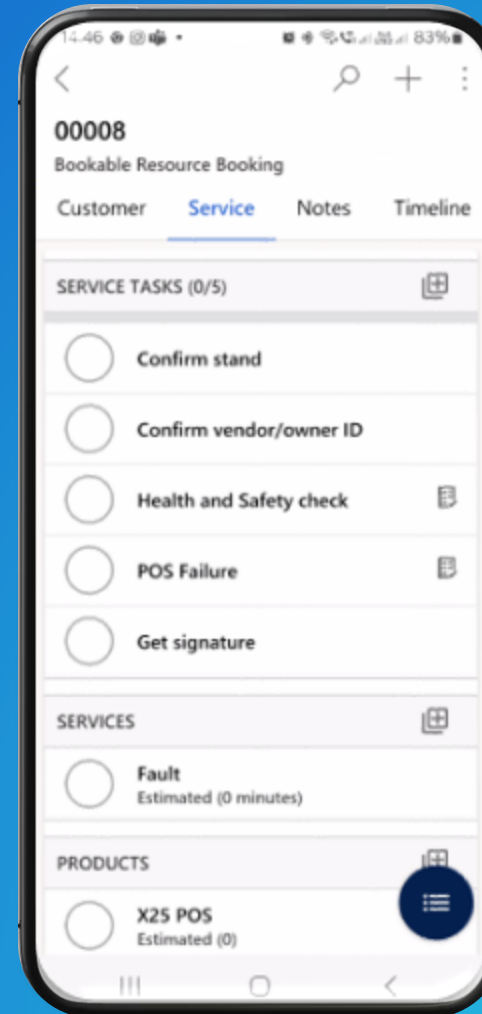
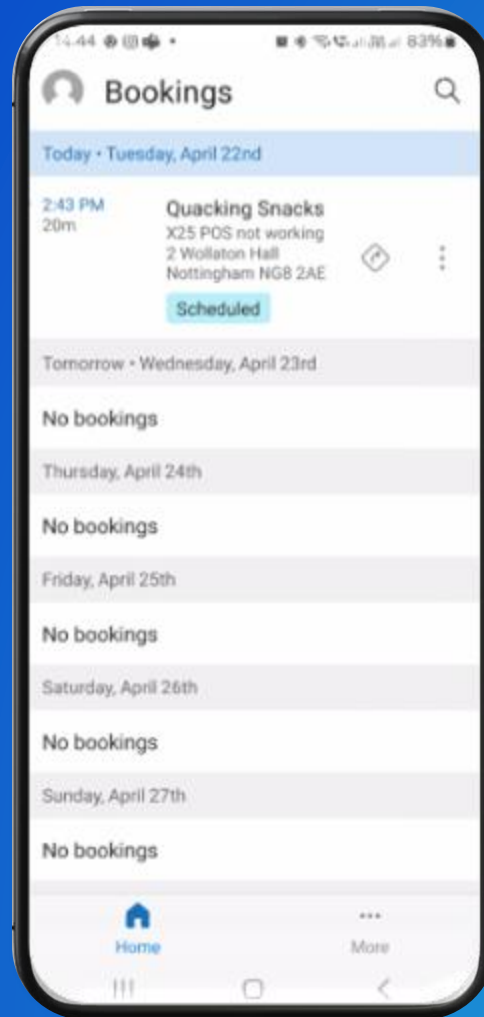


Dispatch



Service

- Mobile App
- Inspections
 - Guides
- Knowledge Base
- Remote Assist





Work Order



Scheduling



Dispatch



Service

- Mobile App
- Inspections
 - Guides
- Knowledge Base
- Remote Assist

Health and Safety check - Saved
Inspection Template Version

Designer Preview Logic Translation Versions Related ▾

Page1

Health and Safety check

Environment

Page description (optional)

1. Are there any cables loose *
☐ Yes
☐ No
2. Please take a photograph
3. Are there any hot liquids *
☐ Yes
☐ No

Toolbox Advanced

- TextBox
- ☒ Checkbox
- Radiogroup
- Dropdown
- Entity Lookup
- Number
- Date Time
- File
- Matrix (Dynamic)

14:06 88%

Health and Safety

General Related ▾

Health and Safety check

* Required

Environment

1. Are there any cables loose *
☐ Yes
☐ No
2. Are there any hot liquids *
☐ Yes
☐ No
3. Is the area accessible *
☐ Yes



Work Order



Scheduling

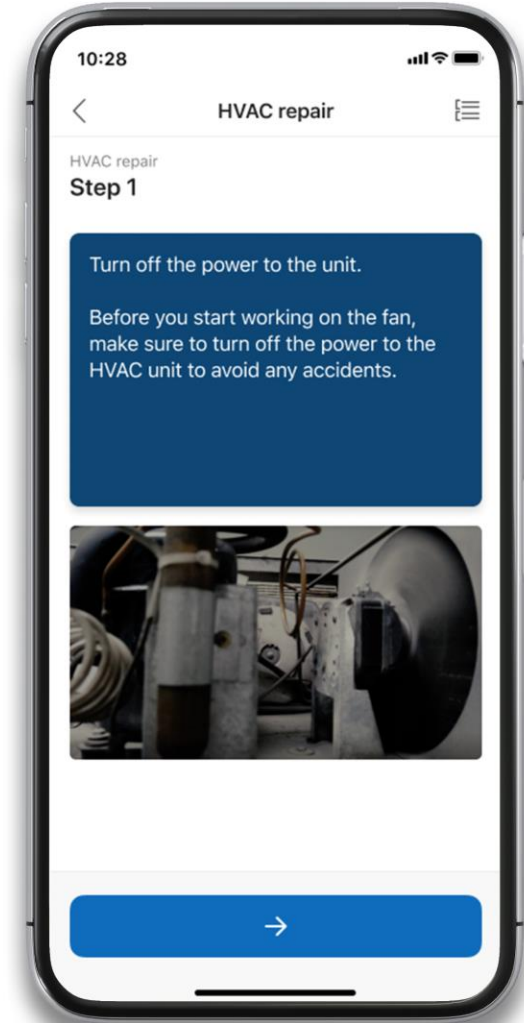
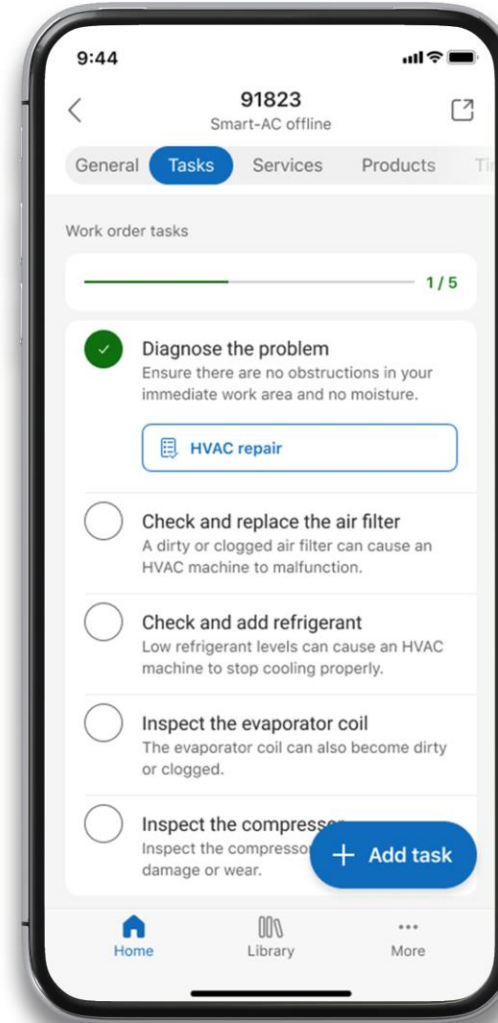
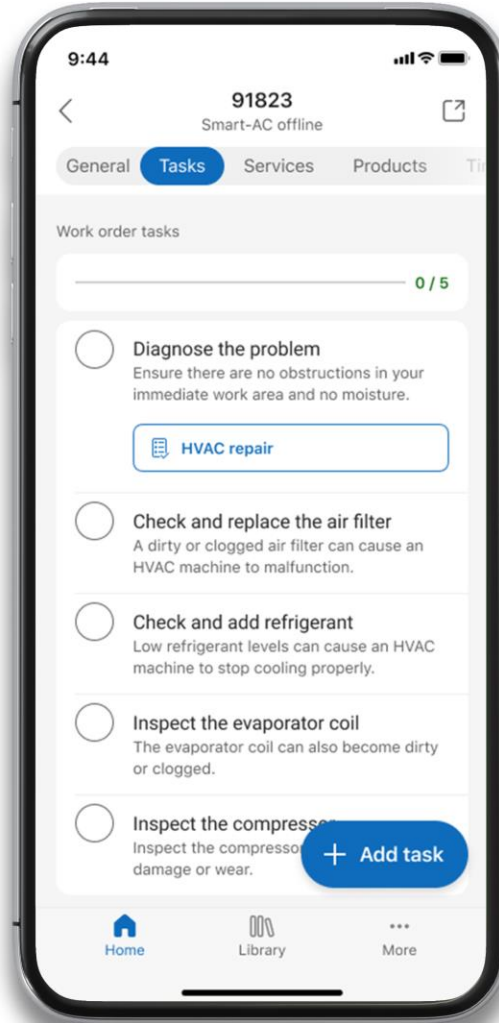


Dispatch



Service

- Mobile App
- Inspections
 - Guides
- Knowledge Base
- Remote Assist





Work Order



Scheduling

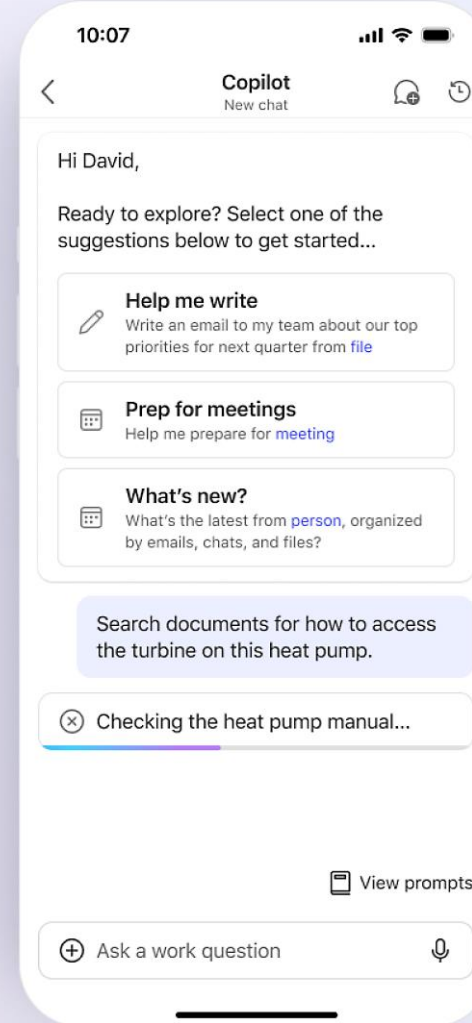


Dispatch



Service

- Mobile App
- Inspections
 - Guides
- Knowledge Base
- Remote Assist





Work Order



Scheduling

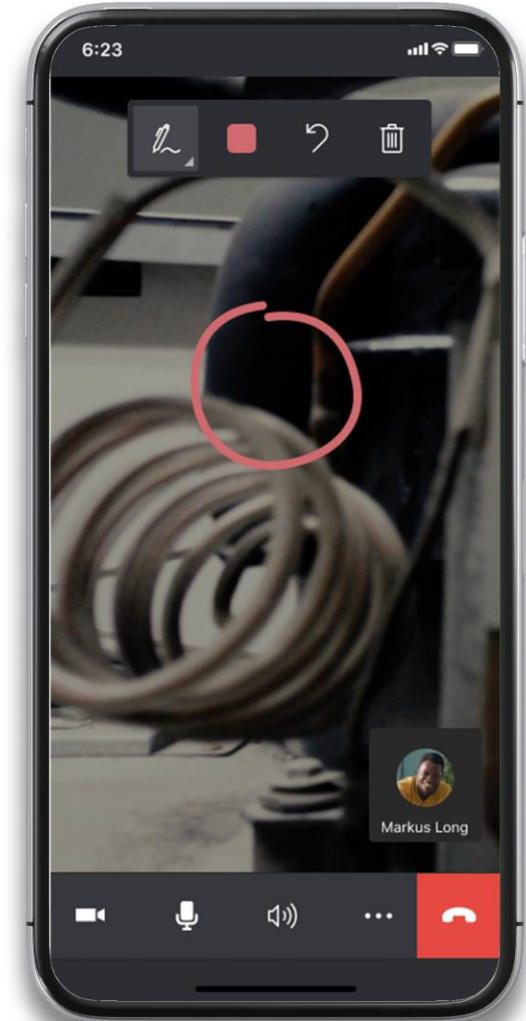
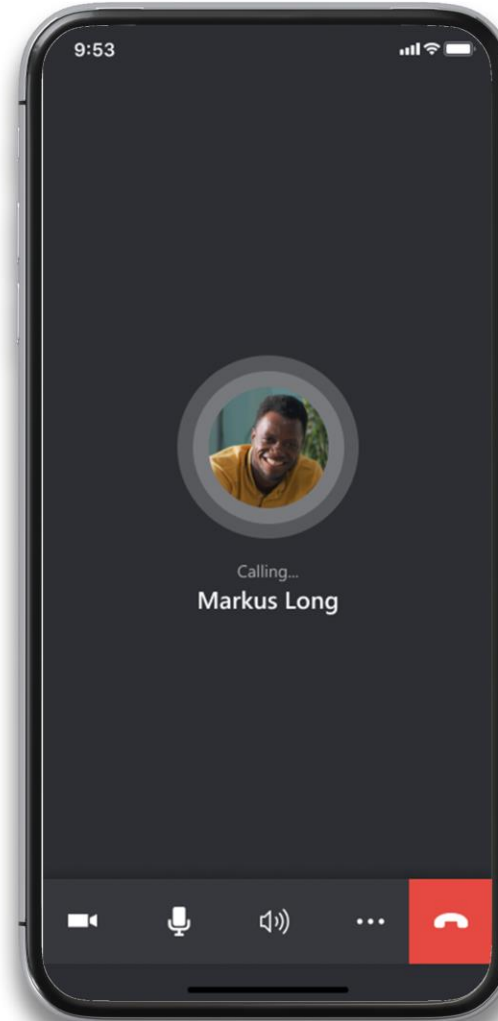
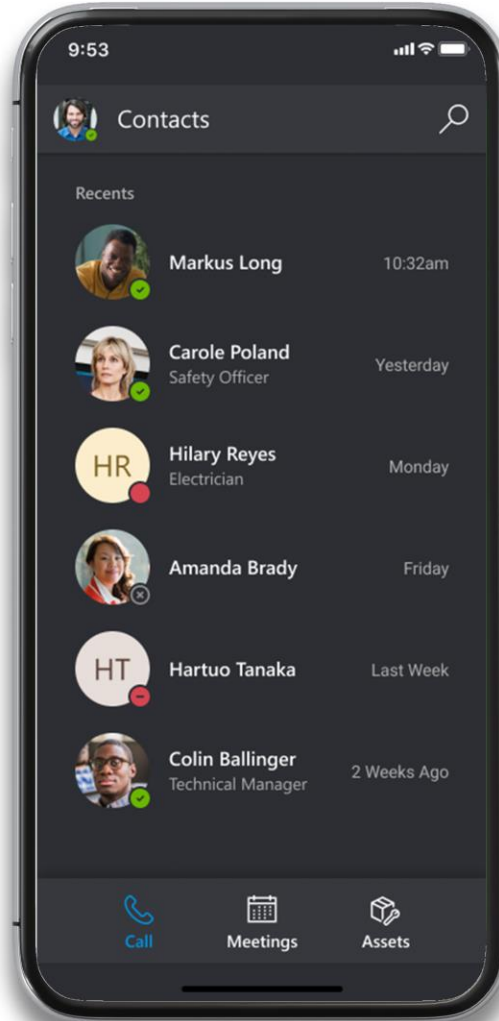


Dispatch



Service

- Mobile App
- Inspections
 - Guides
- Knowledge Base
- Remote Assist





Work Order



Scheduling

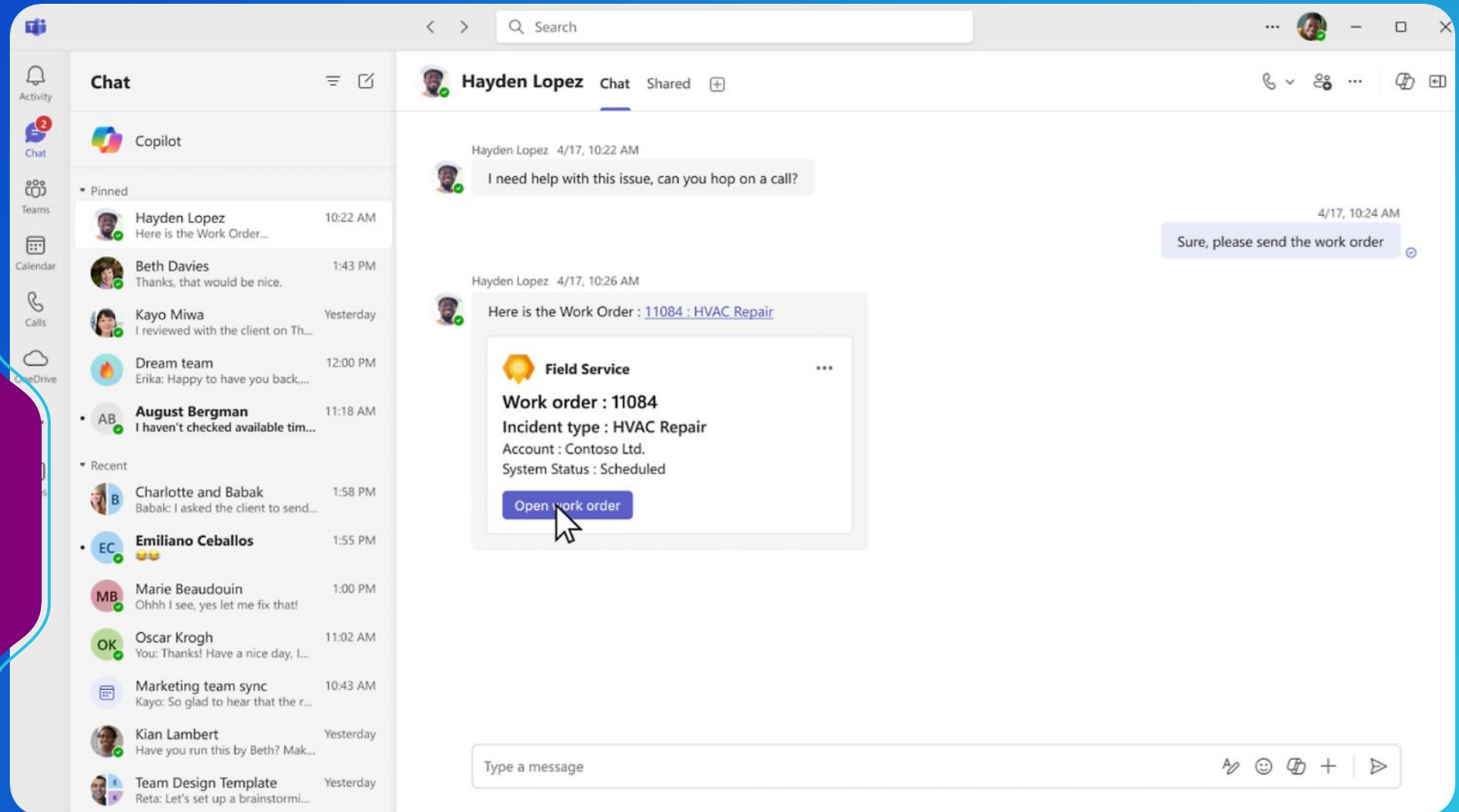


Dispatch



Service

- Mobile App
- Inspections
 - Guides
- Knowledge Base
- Remote Assist



The screenshot displays the 365 Field Service interface within a Teams chat window. On the left, a sidebar shows navigation options: Activity, Chat (with 2 notifications), Teams, Calendar, Calls, and OneDrive. The main chat area is titled 'Hayden Lopez' and shows a conversation. Hayden Lopez's messages include: 'I need help with this issue, can you hop on a call?' (4/17, 10:22 AM) and 'Here is the Work Order : [11084 : HVAC Repair](#)' (4/17, 10:26 AM). A response from the user says: 'Sure, please send the work order' (4/17, 10:24 AM). A 'Field Service' card is displayed in the chat, containing the following information: 'Work order : 11084', 'Incident type : HVAC Repair', 'Account : Contoso Ltd.', and 'System Status : Scheduled'. A blue button labeled 'Open work order' is at the bottom of the card, with a mouse cursor hovering over it. The bottom of the chat window features a 'Type a message' input field and icons for attachments, emojis, and a send button.



Work Order



Scheduling

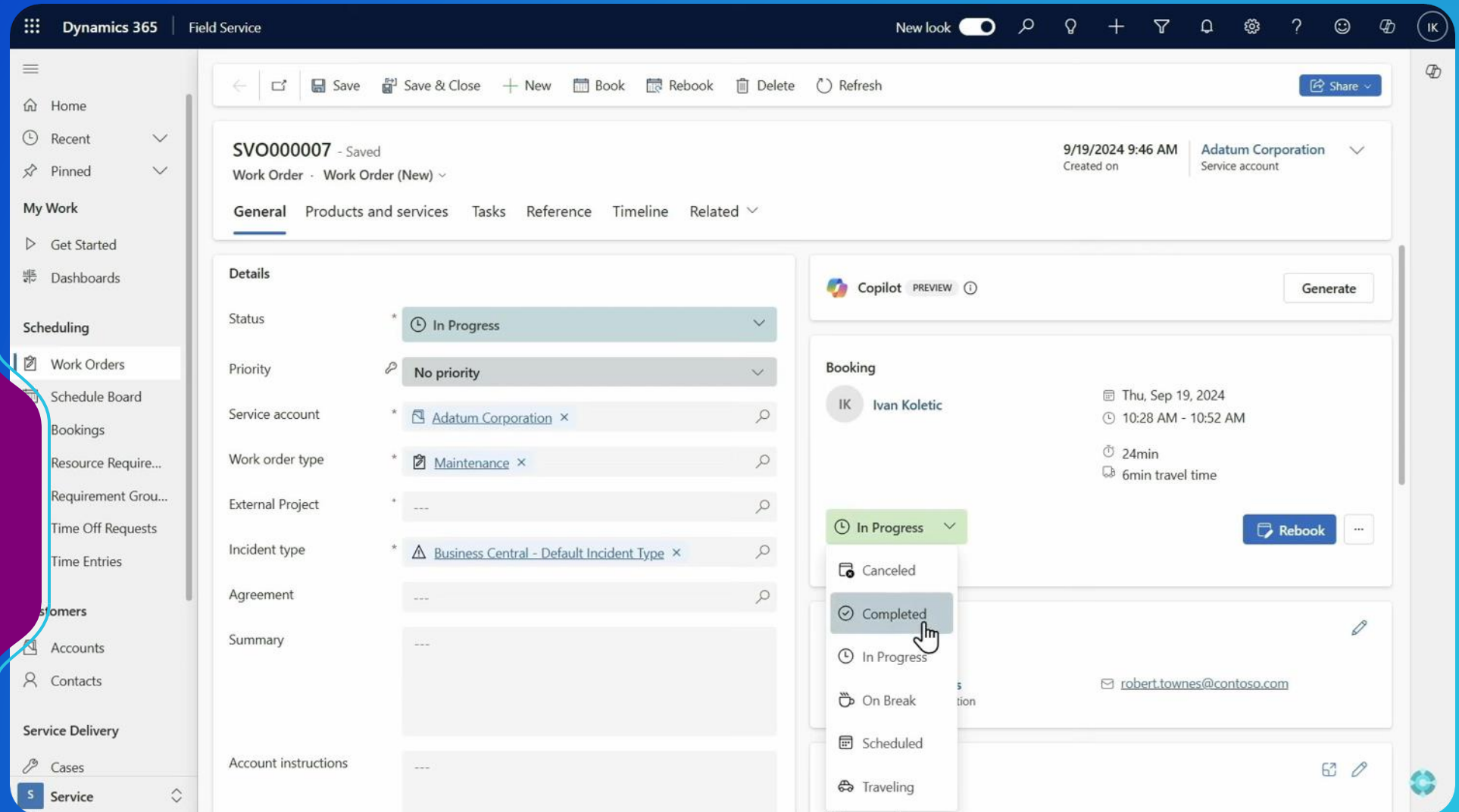


Dispatch



Service

- Mobile App
- Inspections
 - Guides
- Knowledge Base
- Remote Assist



Dynamics 365 | Field Service

New look ☐

SVO000007 - Saved 9/19/2024 9:46 AM Adatum Corporation
 Created on Service account

Work Order · Work Order (New) ▾

General Products and services Tasks Reference Timeline Related ▾

Details

Status * In Progress ▾

Priority No priority ▾

Service account * Adatum Corporation ×

Work order type * Maintenance ×

External Project * ---

Incident type * Business Central - Default Incident Type ×

Agreement ---

Summary ---

Account instructions ---

Copilot PREVIEW Generate

Booking

IK Ivan Koletic Thu, Sep 19, 2024
10:28 AM - 10:52 AM
24min
6min travel time

In Progress ▾ Rebook ...

Canceled

Completed

In Progress

On Break

Scheduled

Traveling

robert.townes@contoso.com



Work Order



Scheduling



Dispatch



Service



Review

Review, post, check and manage

Dynamics 365 Field Service

Search: fabrikam

Accounts

- FI Fabrikam, Inc. City: Redmond
- FR Fabrikam Residences, Inc. City: New York

Work orders

9 91823 Service account: Fabrikam, Inc.

Show more results for fabrikam

Work orders (preview)

ID	Incident	Account	Status	Priority	Created on
87395	HVAC		Scheduled	High	7/8/23 9:56 AM
12416	Ductwork repair	Adatum Corporation	In progress	Medium	7/8/23 9:30 AM
22304	Heat pump diagnosis and repair	Adatum Corporation	Scheduled	High	7/9/23 4:45 PM
32019	Thermostat replacement	Lamna Healthcare...	In progress	Medium	7/9/23 4:31 PM
33401	HVAC annual service	First Up Consultan...	In progress	Low	7/9/23 3:10 PM
40019	HVAC full system diagnosis and re	Lamna Healthcare...	Unscheduled	High	7/10/23 12:04 PM
41008	Full system diagnosis and repair	Humongous Insurance	Unscheduled	High	7/10/23 11:30 AM
45876	Heat pump diagnosis and repair	Northwind Traders	Completed	Urgent	7/10/23 9:20 AM
47812	Ductwork installation	Bellows College	Canceled	Low	7/11/23 1:00 PM
49870	Ductwork repair	First Up Consultan...	Completed	Medium	7/13/23 4:00 PM
50003	HVAC annual service	Lamna Healthcare...	Scheduled	No priority	7/13/23 2:09 PM
51256	HVAC full system diagnosis and re	Lamna Healthcare...	In progress On site	High	7/13/23 10:55 AM

1-250 of 680

Page 1



Work Order



Scheduling



Dispatch



Service



Review

Review, post, check and
manage



Field service feedback

Customer satisfaction survey

Hi {{First Name}},

We hope you had a great experience with our field technician. Please share your thoughts on how it went so that we can make your experience better next time.

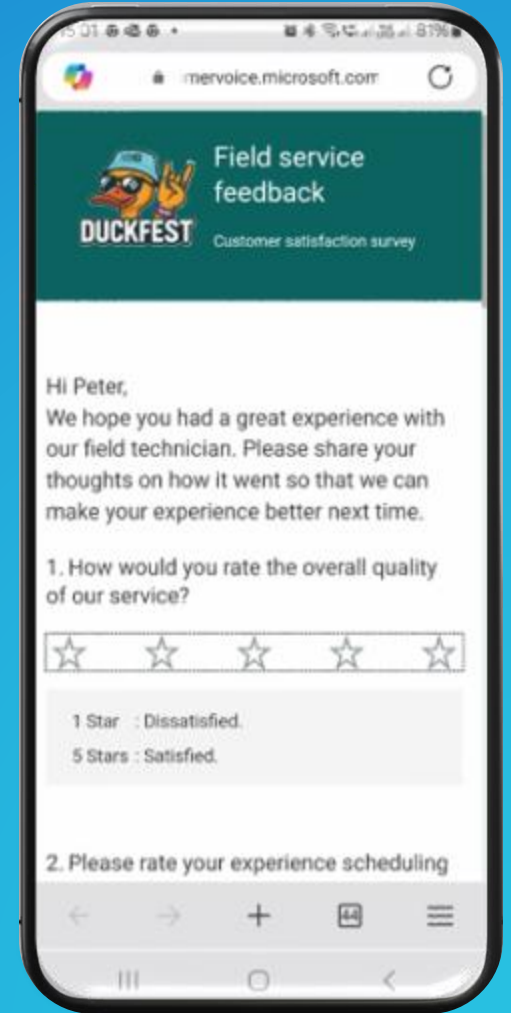
1. How would you rate the overall quality of our service?

Dissatisfied ☆ ☆ ☆ ☆ Satisfied

2. Please rate your experience scheduling a visit:

- ☐ Very difficult
- ☐ Somewhat difficult
- ☐ Neutral
- ☐ Somewhat easy
- ☐ Very easy

3. How would you rate your satisfaction with our field service technician in terms of:




Work Order

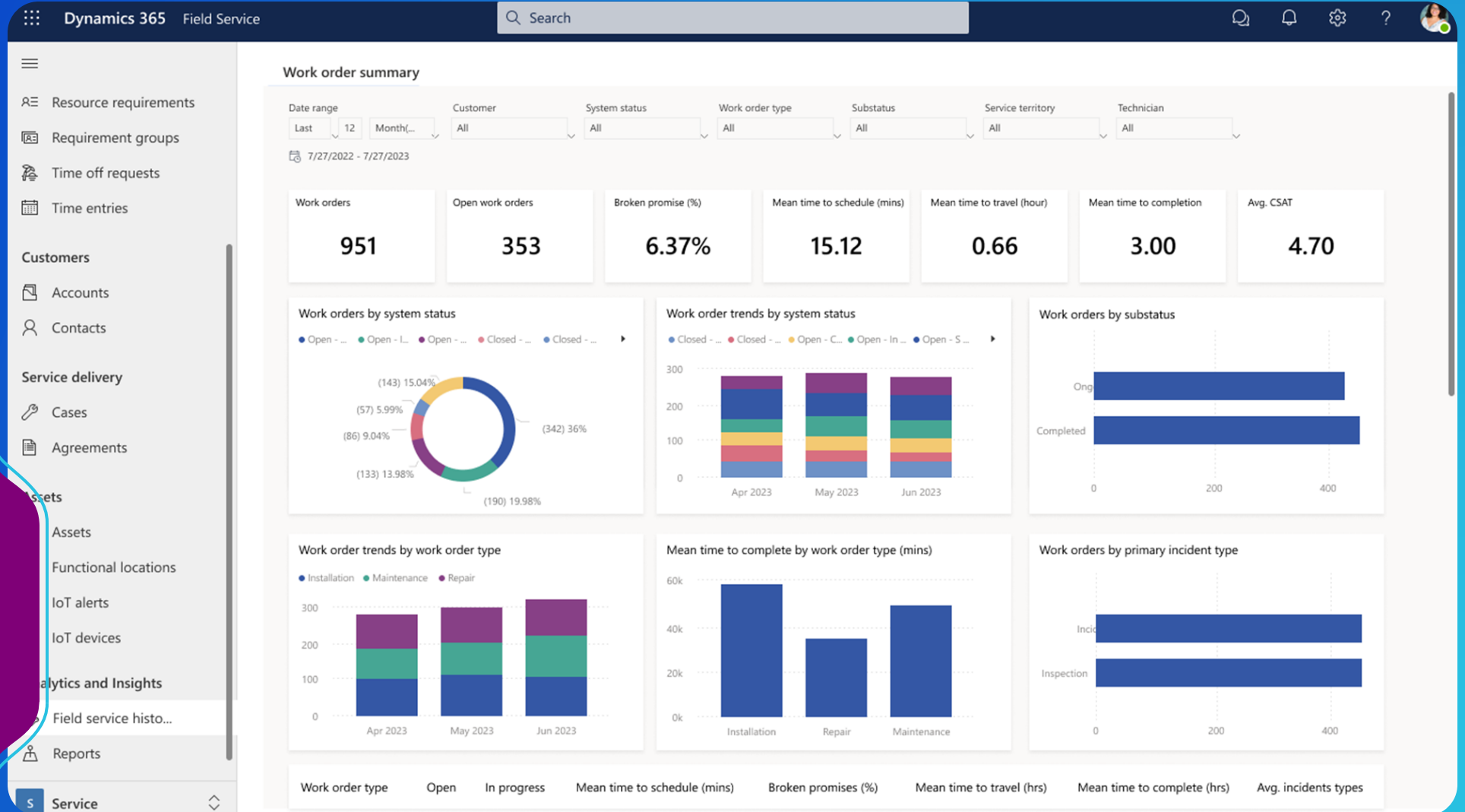
Scheduling

Dispatch

Service

Review

Review, post, check and manage



**Work Order****Scheduling****Dispatch****Service****Review**

Review, post, check and
manage

https://businesscentral.dynamics.com

Dynamics 365 Business Central

CONTOSO, LTD

Projects Open Planning

Headline

Good afternoon

Activities

Invoicing

Upcoming Invoices 0

Invoice Created

User Tasks

My User Tasks

Pending User Tasks 0

Dynamics 365 Field Service Integration Setup

Home Mapping Synchronization Actions Automate Fewer options

Assisted Setup Test Connection

Connection from Dynamics 365 Business Central to Dynamics 365 Field Service

Field Service URL https://contoso.crm.dynamics Active scheduled sync... 0 of 0

Enabled ☒

Additional Settings

Project Journal Template INTEGRATIO

Project Journal Batch FS

Hour Unit of Measure HOUR



Work Order



Scheduling



Dispatch



Service



Review

Review, post, check and
manage

Dynamics 365 Business Central

Environment:
prod_53248



CRONUS USA, Inc.

Service Management

Posted Documents

All Reports



Service Orders: All



+ New



Delete



Post...



Print/Send



Warehouse



Order



Synchronize



No. ↑	Status	Order Date	Order Time	Customer No.	Name	Location Code	Response Date	Response Time	Release Status	Coup... to Dyna... 365
00005	Pending	9/18/2024	11:21:36 PM	10000	Adatum Corporation		9/18/2024	11:21:36 PM	Open	<input checked="" type="checkbox"/>
SVO000001	In Process	9/10/2024	2:13:48 PM	10000	Adatum Corporation	MAIN	9/11/2024	2:13:48 AM	Open	<input checked="" type="checkbox"/>
SVO000002	In Process	10/1/2024	2:13:49 PM	20000	Trey Research		10/2/2024	2:13:49 AM	Open	<input checked="" type="checkbox"/>
SVO000003	In Process	10/1/2024	2:35:39 PM	40000	Alpine Ski House	MAIN	10/1/2024	2:35:39 PM	Open	<input checked="" type="checkbox"/>
SVO000004	In Process	10/1/2024	2:35:40 PM	50000	Relecloud	MAIN	10/1/2024	2:35:40 PM	Open	<input type="checkbox"/>
SVO000007	Finished	9/10/2024	9:45:34 AM	10000	Adatum Corporation	MAIN	9/10/2024	9:45:34 AM	Open	<input checked="" type="checkbox"/>

Finished





Work Order



Scheduling



Dispatch



Service



Review

Review, post, check and manage

Dynamics 365 Business Central

Environment:
prod_53248



Service Order



✓ Saved



SVO000007 · Adatum Corporation

Home

Order

Synchronize

Actions

Related

Automate

Fewer options



Post...

Archive Document

Release to Ship

Print...

Create Warehouse Shipment



State GA

Status Finished

Post Code 31772

Country/Region Code US

Contact Name Robert Townes

Open



- ☐ Ship
- ☐ Invoice
- ☐ Ship and Invoice
- ☒ Ship and Consume

OK

Cancel

Lines

Manage

Line

Functions

Order



Service Lines

Service Item No.	Item No.	Service Item Group Code	Serial No.	Description	Repair Status Code	War...	Contract No.	Service Price Group Code	Fault Code
→ SV000006	S-100	SERVICE	CMS100-00002	S-100 Semi-Automatic	INITIAL	✓			

Invoicing

Show less

Bill-to Customer No. 10000

Posting Date 9/10/2024



Work Order



Scheduling



Dispatch



Service



Review

Review, post, check and manage

Dynamics 365 Business Central Environment: prod_53248

Service Order

SVO000007 · Adatum Corporation

Home Order Synchronize Actions Related Automate Fewer options

Post... Archive Document Release to Ship Print... Create Warehouse Shipment

State GA Status Finished

Post Code 31772

Country/Region Code US

Contact Name Robert Townes

Lines Manage Line Functions Order

Service Lines

Service Item No.	Item No.	Service Item Group Code	Serial No.	Description	Repair Status Code	War...	Contract No.	Service Price Group Code	Fault Code
→ SV000006	S-100	SERVICE	CMS100-00002	S-100 Semi-Automatic	INITIAL	<input checked="" type="checkbox"/>			

Invoicing

Bill-to Customer No. 10000 Posting Date 9/10/2024

Ship Invoice Ship and Invoice Ship and Consume

Cancel



Work Order



Scheduling



Dispatch



Service



Review

Review, post, check and manage

Dynamics 365 Business Central

Environment: prod_53248

Service Order

SVO000007 · Adatum Corporation

Home Order Synchronize Actions Related Automate Fewer options

Post... Archive Document Release to Ship Print... Create Warehouse Shipment

State GA Status Finished

Post Code 31772

Country/Region Code US

Contact Name Robert Townes

Working on it...

Order SVO000007 -> Invoice PSVI000005
Posting lines 3
Posting serv. and tax 1
Posting to customers
Posting to bal. account

OK Cancel

Lines Manage Line Functions Order

Service Lines

Service Item No.	Item No.	Service Item Group Code	Serial No.	Description	Repair Status Code	War...	Contract No.	Service Price Group Code	Fault Code
→ SV000006	S-100	SERVICE	CMS100-00002	S-100 Semi-Automatic	INITIAL	<input checked="" type="checkbox"/>			

Invoicing

Bill-to Customer No. 10000 Posting Date 9/10/2024

Business Central and Field Service

The best of both worlds

Internal and External view

Frontline worker transparency

What I can do now with Field Service linked to Business Central

- Work orders delivered out of the office to front line workers
- Travel Times
- Estimated and actual times and pricing
- Mobile offline application
- Capture Signatures
- Scheduling of Resources
- Live visibility of where the front line workers are
- Geo Fencing
- Inventory use at source
- Satisfaction survey linked to the work order

Thank You.

[Gemma - g.mooney@node4.co.uk](mailto:g.mooney@node4.co.uk)

[Peter - p.norman@node4.co.uk](mailto:p.norman@node4.co.uk)

Please rate all sessions

let us know how we did

