



POWERED BY  DUG

# DYNAMICS CON

# LIVE

MAY 2024

The central graphic is a large, multi-colored starburst shape. Inside the starburst, the text "POWERED BY" is in yellow, followed by a logo consisting of three colorful arrows (purple, green, and pink) pointing towards each other, and the word "DUG" in yellow. Below this, "DYNAMICS CON" is written in large, bold, yellow 3D block letters with a multi-colored gradient. Underneath that, "LIVE" is written in the same style. At the bottom of the starburst, "MAY 2024" is written in yellow. The background of the starburst is a mix of purple, pink, and blue.



# Fasten your seatbelts for Field Service Copilot

Dynamics 365



# Who are we



Michelle Albright

Microsoft  
Dynamics 365 Global Black Belt  
Service Category SME:  
Field Service, Customer Service and  
Project Service



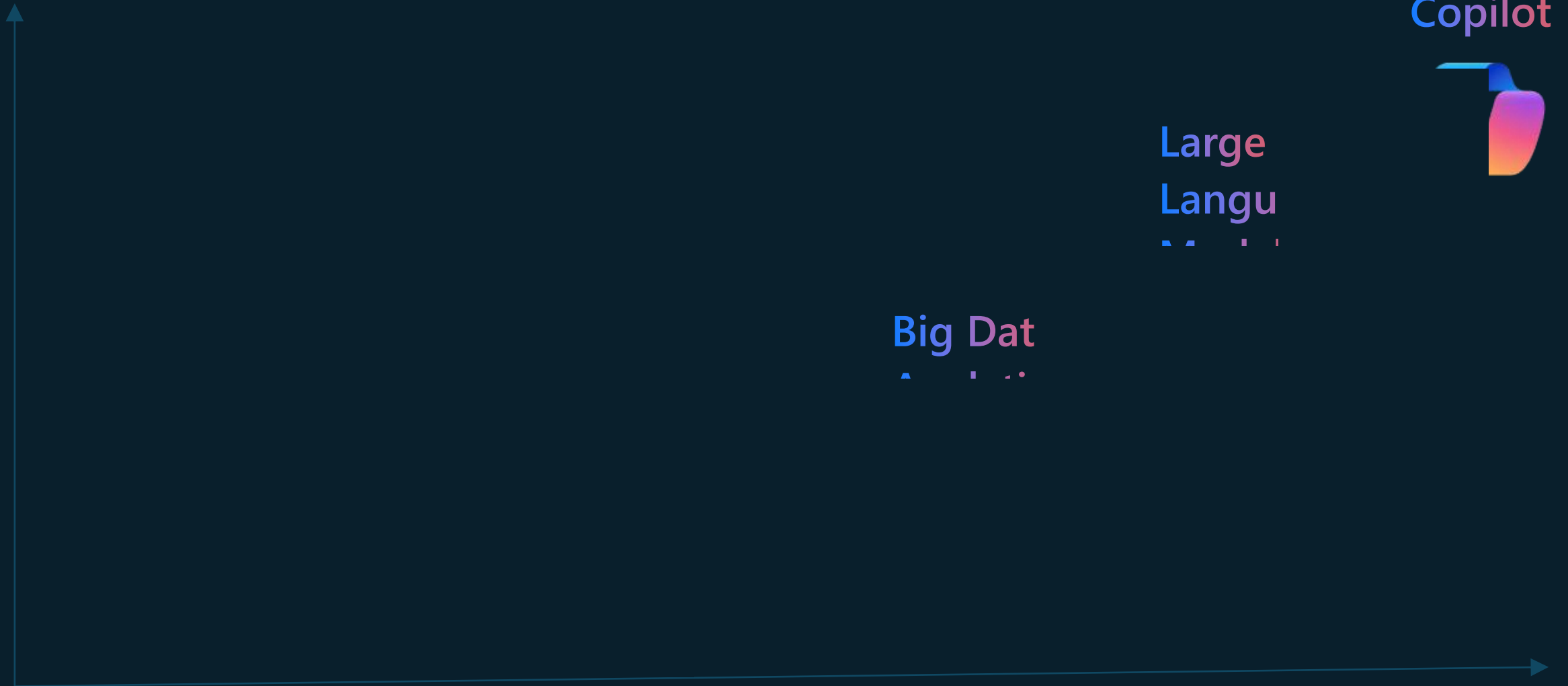
Marcio Decat

Microsoft  
Dynamics 365 Global Black Belt  
Field Service Technical lead



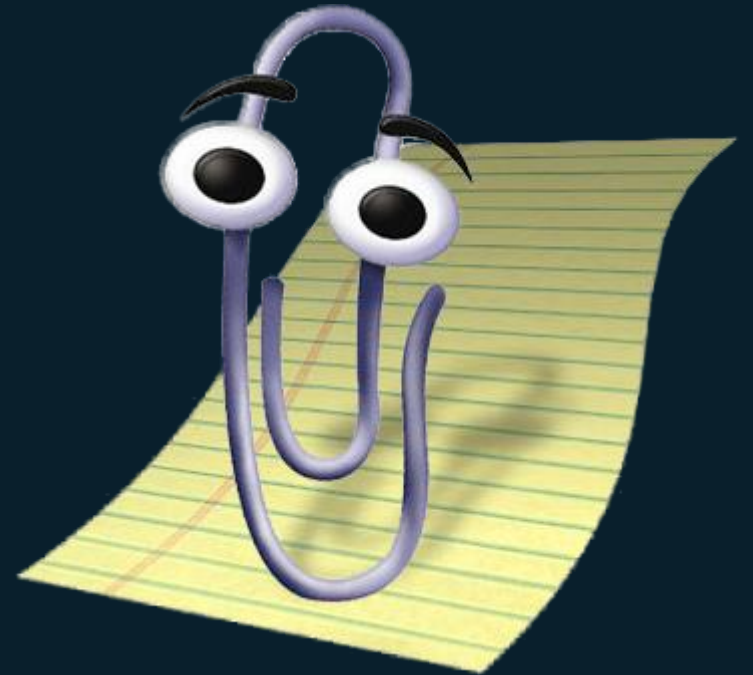


# Evolution of AI for frontline workers



Change is hard.

But it's worth it.



# What's different now?

Ease  
of use



Personalization



Improvement  
over time



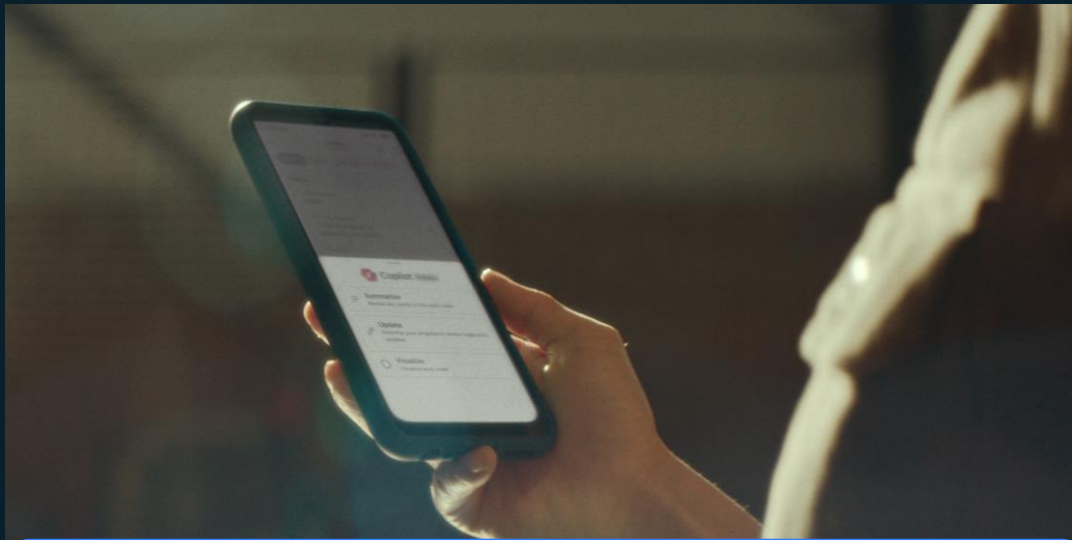
The AI shift is  
impacting  
everyone,  
across  
workflows





# Workforce Priorities

## Repetitive tasks & paperwork



63%

of frontline workers **struggle with having to do repetitive or menial tasks** that take time away from more meaningful work.

## Information search

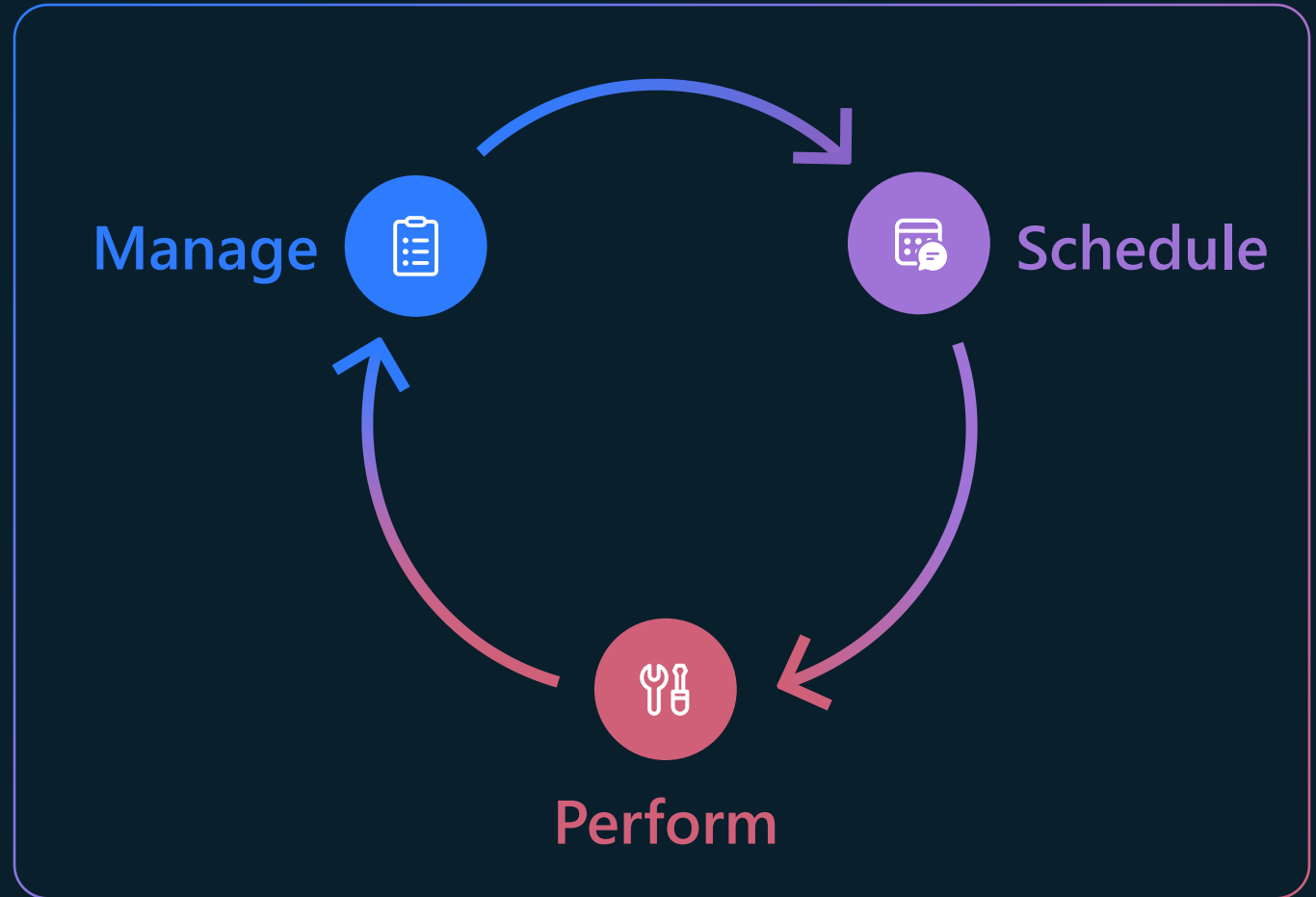


80%

of frontline workers think **AI will augment their ability to find the right information** and answers they need.

# Microsoft's mission for the frontline workforce

Digitalize the frontline workforce by providing the #1 AI-driven application suite to manage, schedule and perform their work.



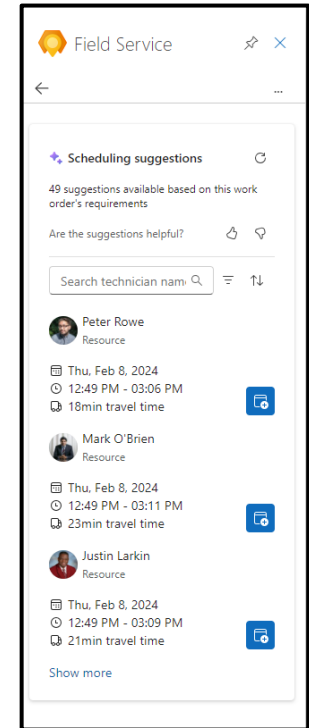
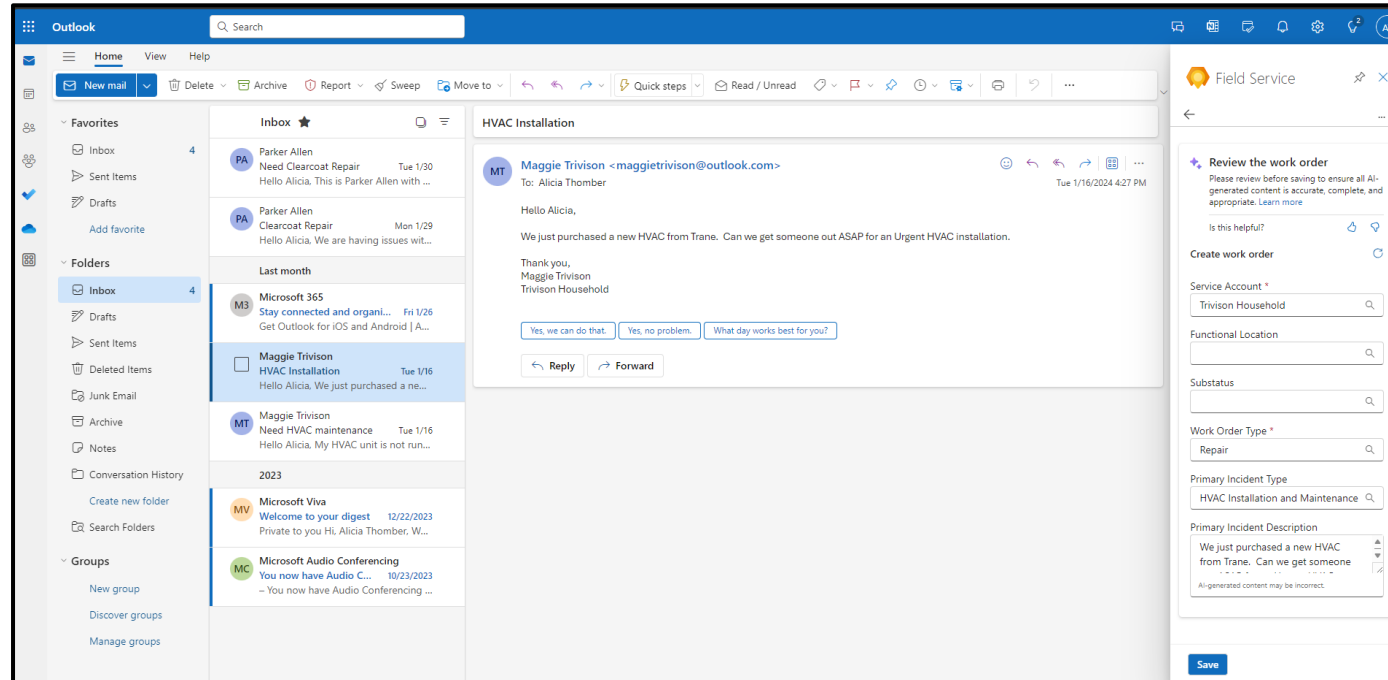
# Assisting, not Replacing



- Fly the plane yourself, with a helpful Copilot by your side
- Let Copilot aid your work, but don't let it take over
- Together, you and Copilot can enhance your abilities

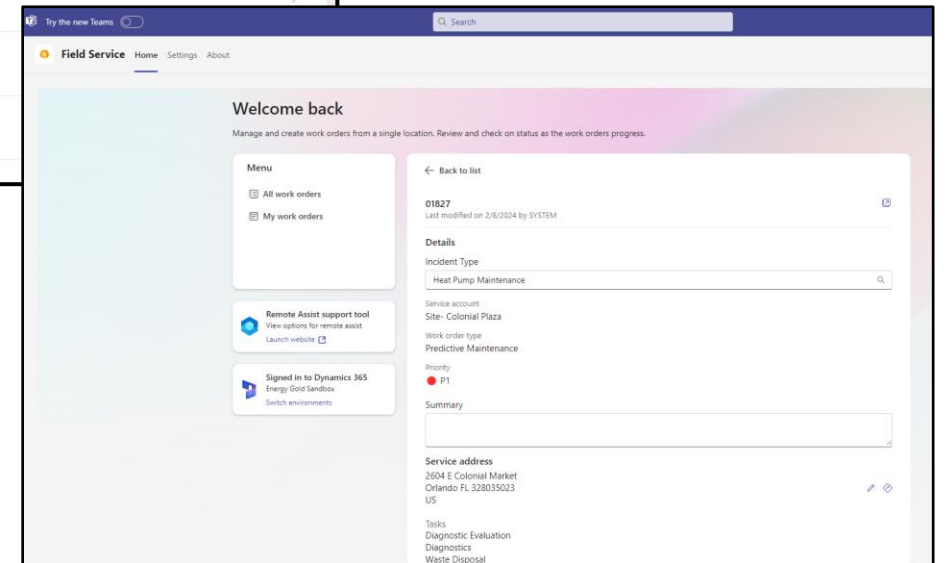
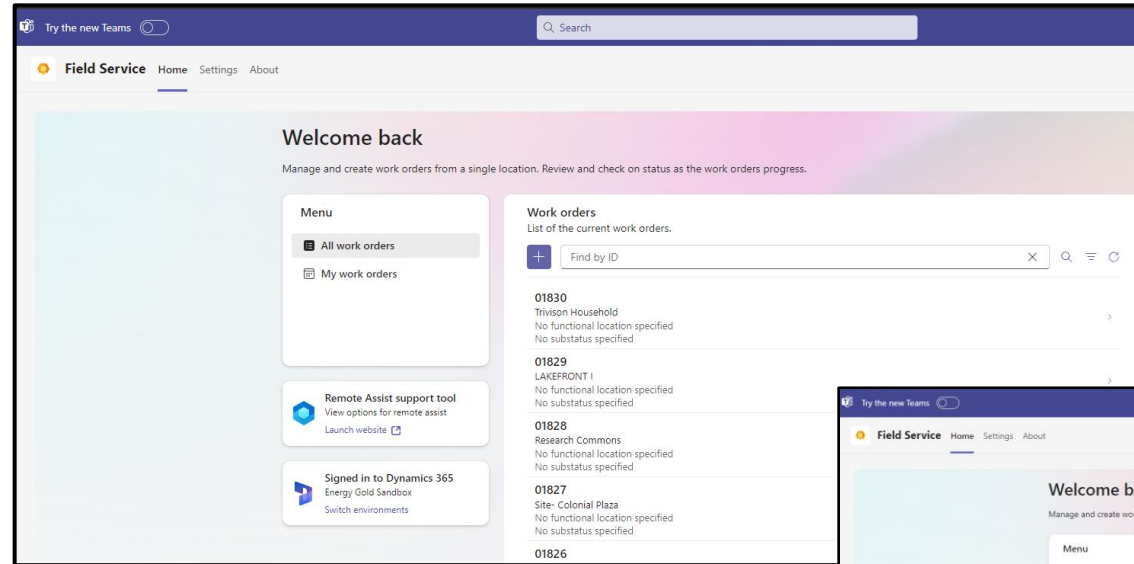
# Outlook

- Why? = Allows the technician or supervisor to create and schedule a Work Order from a request that comes in via email.



# Teams

- Why? = Allows frontline workers to be able to create and view Work Orders from Teams





# Field Service Plugin for Microsoft Copilot

**Why:** Provides frontline workers and managers access to key work order information from Teams.

## Sample Questions:

- Show me work orders created in October for customer {name}.
- Can you give me details on {several work order numbers} in a table format?
- What are the details for work order {work order number}? Can you summarize? Can you summarize in a paragraph?
- What is the incident type and service account of {several work order numbers} in table format?
- What is the progress of {work order number}?
- What type of work order is {work order number}, so I can assign the right technician?
- Who is the technician for {work order number}? or What is the {work order number} assigned to technician {email\_address}?
- Show me bookings for next week in a table format.
- Show me high priority work orders created in November.
- How many work orders?
- How many of these work orders are unscheduled and high priority?
- How many work orders for customer {name} and what is the status?
- Can you find work orders from last week?

The screenshot displays the Microsoft Copilot interface with two chat windows. The top window shows a response to the question "what is the status of work order 00019?". The response states that work order 00019 is an Inspection work order for Fabrikam Residences, created on 11/15/2023 11:51 AM, with an Onsite location and a Scheduled status. A booking is associated with it for Anthony Ivanov on 11/28/2023 from 2:46 PM to 5:13 PM.

The bottom window shows a response to the question "Show me in progress work orders in a table format?". The response provides a table of in-progress work orders from Dynamics 365 Field Service:

Work Order ID	Work Order Type	Service Account	Primary Incident Type	System Status
00004	Service Call	Cortisso Cuffie	Thermostat is broken	In Progress
00006	Service Call	Adventure Works	Fan Out	In Progress
00007	Service Call	City Power & Light (sample)	Fan Out	In Progress
00008	Service Call	Colha Diagnostics	MRI Cycle is too long	In Progress
00015	Service Call	Contoso Pharmaceuticals (sample)	Printer Issue	In Progress
00029	Service Call	Margie's Travel	Camera Down	In Progress
00030	Service Call	Murson's Pickles and Preserves Farm	Thermostat is broken	In Progress
00031	Service Call	Pod Publishers	MRI Cycle is too long	In Progress
00034	Service Call	Rainbow Trainers	Camera Down	In Progress
00038	Inspection	School of Fine Art	Regulatory Inspection	In Progress

The bottom window also shows a response to the question "What is the most recent work order from frontline worker?". The response states that the most recent work order is an Inspection work order with the name 00050, created on 11/15/2023 11:52 AM for City Medical Systems Suite, with an Onsite location and an In Progress status. The booking was created on 11/15/2023 11:53 AM for the resource Maya Robinson.



# Work Order form

- Why? = Provides a summary of Tasks, Products and \$ for the company and the customers.

The screenshot displays a work order management interface. At the top, there are three status boxes: 'WO SLA Booking Noncompliant' (red exclamation mark), 'WO Arrival SLA Succeeded' (green checkmark), and 'WO Complete SLA Succeeded' (green checkmark). Below these is a Copilot-generated summary section with a 'Regenerate' button. The Copilot text provides a detailed overview of the work order, including location, completion date, cost, and technician. At the bottom, a 'Summary' section includes technician information (Alicia Thomber), completion status, date, and time. To the right of the summary is a table comparing estimated and actual values for 'Total cost' and 'Total price'. A 'Post' button is located in the bottom right corner.

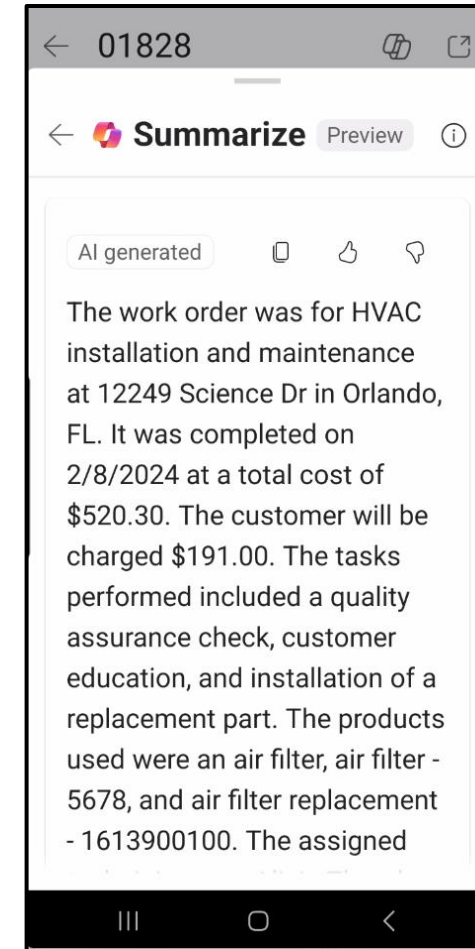
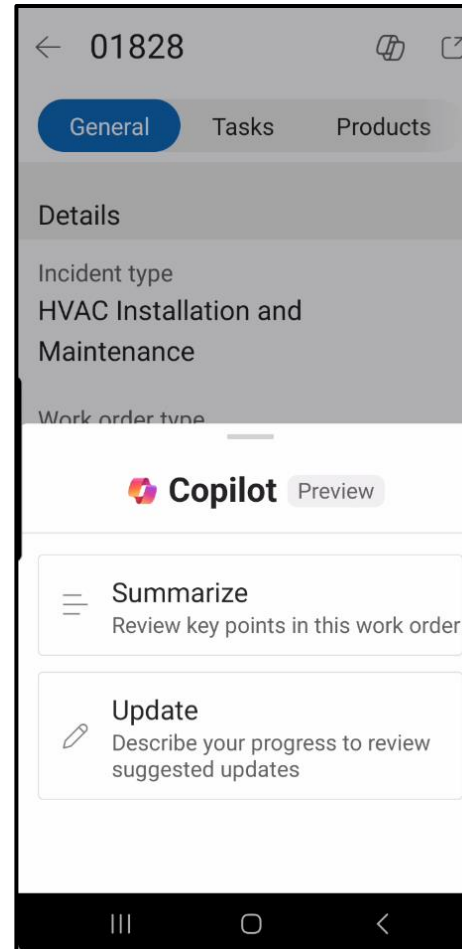
Total cost		Duration	
Estimated	\$432.65	Estimated	2h
Actual	\$520.30	Actual	0min

Total price	
Estimated	\$195.50
Actual	\$191.00

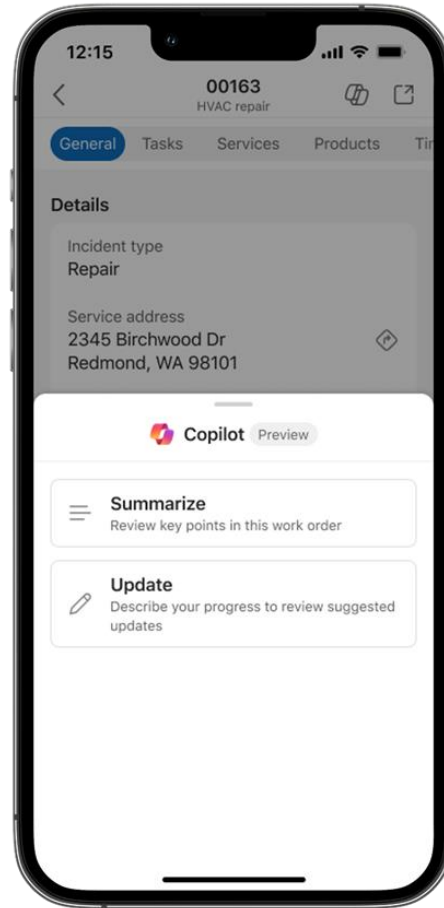
# Field Service Mobile - Summarize

- Why? – Provides a summary of work for the Technician to send to the customer.



# Field Service Mobile - Update

- Why? – Allows technicians to update many fields by talking into the app



“Just say it”  
Voice to Text

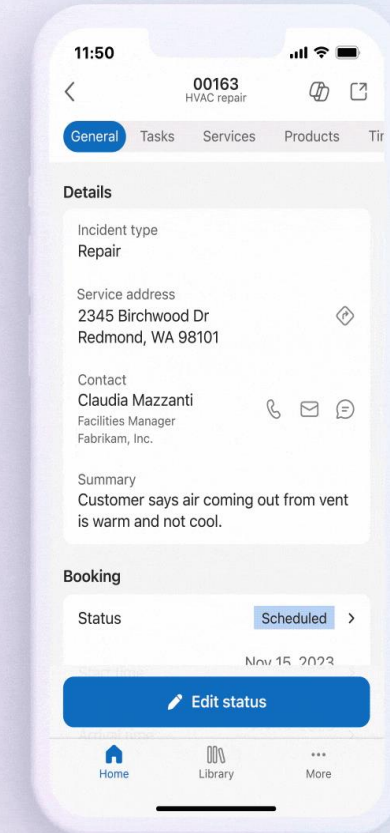
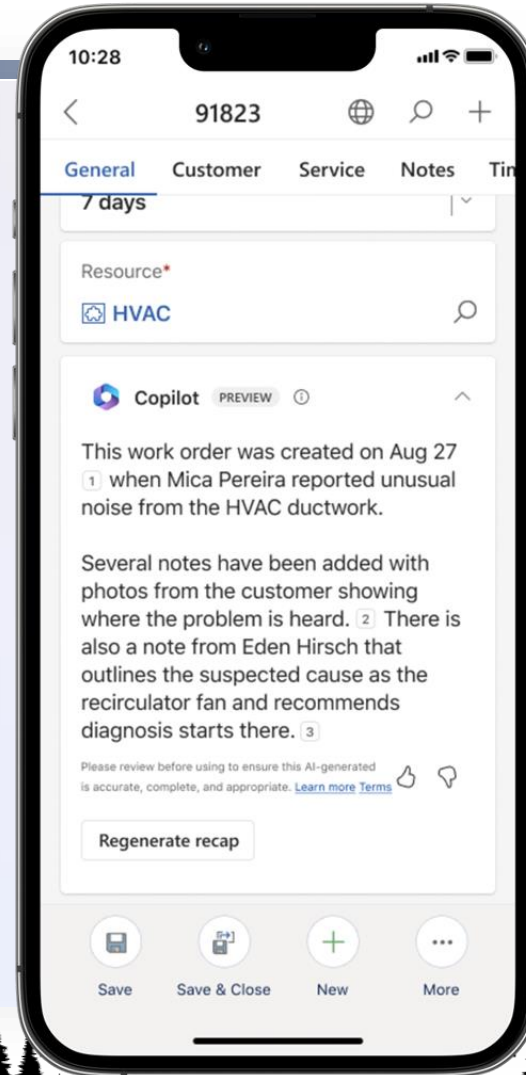
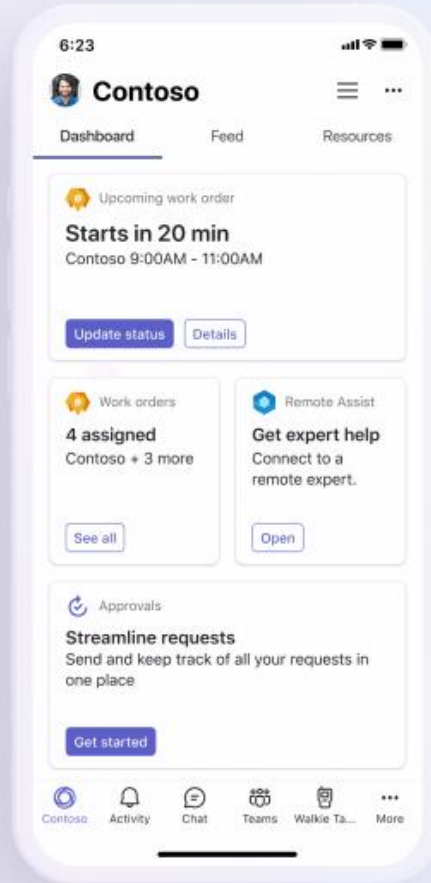


Contextual  
Actions based  
on intent



Update work  
orders and  
other details

# Innovation for Front-Line Workers





# Enhance productivity with Copilot

The screenshot shows the Dynamics 365 Field Service web application interface. The top navigation bar includes the Dynamics 365 logo, a search bar, and user profile information. The left sidebar contains navigation options: Home, Recent, Pinned, My 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, Agreements), and Assets (Service). The main content area displays a work order for ID 11084, which is saved and active for 1 day. The work order details include: Status (Unscheduled), Priority (High), Service account (Contoso Ltd.), Work order type (Diagnose and repair), Incident type (HVAC full system diagnosis an...), Trade (Electrical), and Agreement (3 year HVAC maintenance). The Summary section provides instructions: "Assess the ductwork, air handler, coils, heat pump, and thermostats. Run all firmware upgrades. Replace filters over 6 months old." and "Conduct repairs as needed and under NTE. Quote approval required." The Account instructions section states: "Maintenance entrance is located on alley between NE 80th St. and Cleveland St. Call via keypad to enter." The Copilot chat window on the right displays a greeting: "Hi Molly. Ready to explore? Select one of the suggestions below to get started..". It offers three suggestions: "Analyze: How many Work orders are there?", "Ask: What are my Accounts?", and "Act: Navigate to Bookings". Below these suggestions, Copilot provides a summary of the work order: "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." It also includes a "Re-generate summary" button and "Booking suggestions" for HVAC technicians: David So (Wed Apr 17, 2024, 10:00 AM-12:00 PM, 20min travel time), Maricel Bautista (Wed Apr 17, 2024, 3:00 PM-5:00 PM, 25min travel time), and Renata Hall (Fri Apr 19, 2024, 9:00 AM-11:00 AM, 12min travel time). A text input field at the bottom of the chat window contains the text "Ask a question about the data in this app, or tell me what you're looking for" and a "0/500" character count.

Interact with Copilot to find pertinent information about work orders using natural language in D365 FS web app

Copilot assists in retrieving work order details, summarizing, and presenting them in a digestible format

Search other Dataverse records, including accounts, contacts, opportunities, and more

Configure the data that Copilot uses to generate work order summaries



Work Orders Work Orders - Dyn... x

https://org9fca19e7.crm.dynamics.com/main.aspx?appid=5678a438-08d7-eb11-bacb-000d3a1f9c1b&pagetype=entitylist&etn=ms...

Dynamics 365 | Field Service

Search

New look

Copilot

Chat

Filter by keyword

<input type="checkbox"/>	Work Order Number	Primary Incident Type	Service Account	System Status
<input type="checkbox"/>	19023	Electric meter install	Contoso Electric - Res	Unsched
<input type="checkbox"/>	19022	Standard Inspection	Contoso Waste	Unsched
<input type="checkbox"/>	19021	Tire Rotation	Contoso Waste	Unsched
<input type="checkbox"/>	19020	Brake Replacements	Contoso Waste	Unsched
<input type="checkbox"/>	19019	Tire Replacement	Contoso Waste	Complete
<input type="checkbox"/>	19018	Hydraulic Hose Replacement	Contoso Waste	Schedule
<input type="checkbox"/>	19015	Compressor Maintenance	Contoso Waste	Schedule
<input type="checkbox"/>	19014	Hydraulic Hose Replacement	Contoso Waste	Schedule
<input type="checkbox"/>	19013	Tire Rotation	Contoso Waste	Schedule
<input type="checkbox"/>	19012	Tire Replacement	Contoso Waste	Schedule
<input type="checkbox"/>	19011	Tire Replacement	Contoso Waste	Schedule
<input type="checkbox"/>	19010	Car Oil change	Contoso Waste	Schedule
<input type="checkbox"/>	19009	Engine Rebuild	Contoso Waste	Unsched
<input type="checkbox"/>	19008	Brake Replacements	Contoso Waste	Unsched

Rows: 5000+

View Prompts

Ask a question about the data in the app. Use / to reference data

0/500

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)



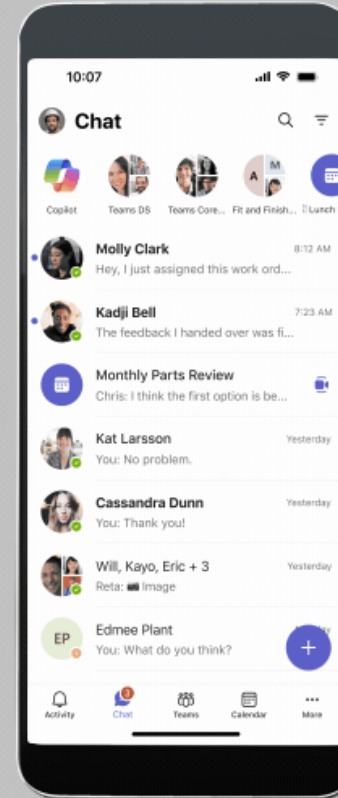


# Get technician insights with Copilot

Use natural language chat in the flow of work in Microsoft Teams to find key information about their work order

Ask Copilot to search through lengthy product manuals in natural language

Copilot can find relevant answers to resolve issues faster

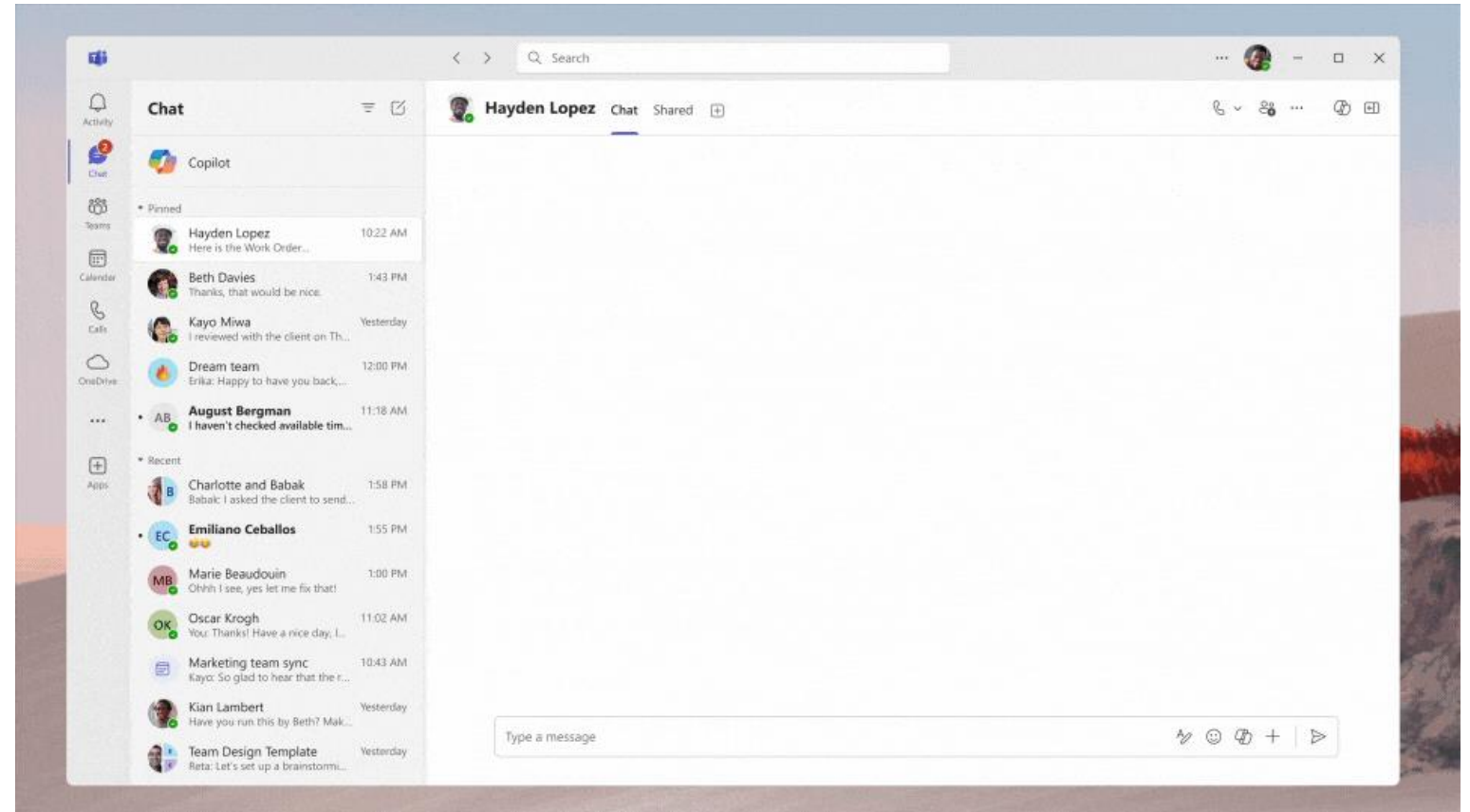


# Preview work orders in Teams with link unfurling

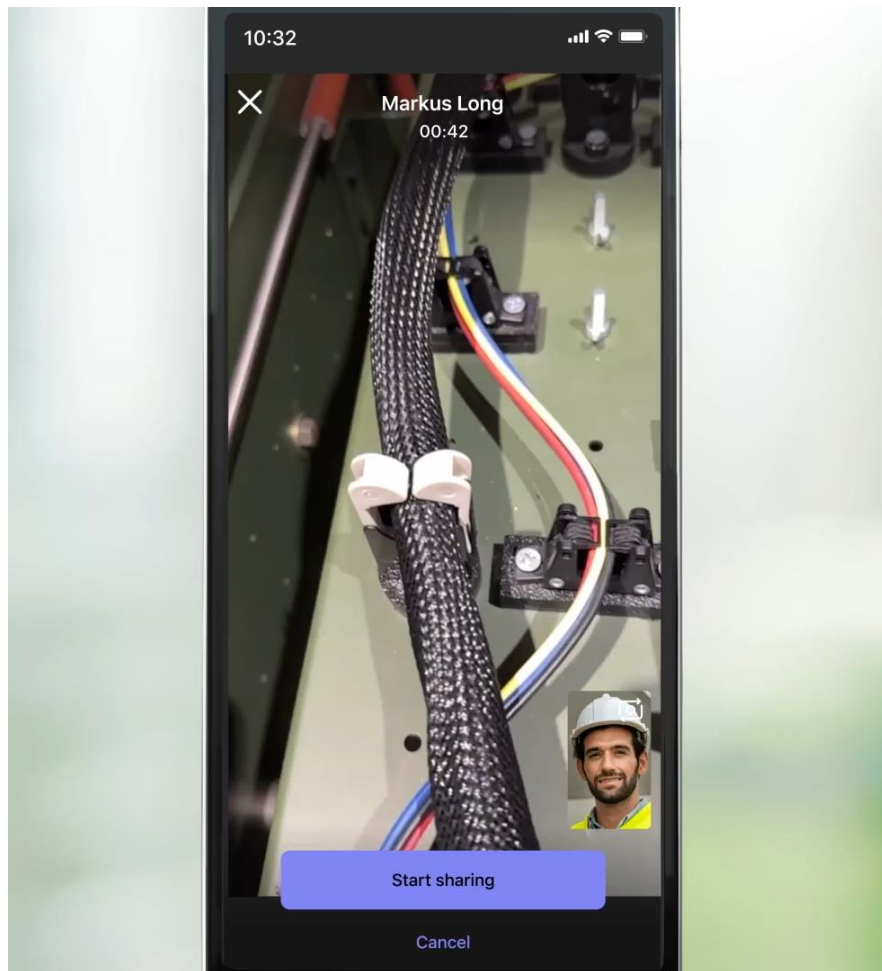
Share links to work orders that automatically expand to key details

Link preview eliminates the need to switch context between apps

Receive rich context, in the flow of work, and save time



# Get remote assistance seamlessly within Teams



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Frontline technicians can easily launch a Dynamics 365 Remote Assist call natively within Microsoft Teams Mobile.

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Technicians can receive remote assistance via video call with 3D spatial anchors and annotations within Teams mobile.

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Access to Dynamics 365 Remote Assist is available at no additional cost with Dynamics 365 Field Service.

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# Using Copilot with HoloLens

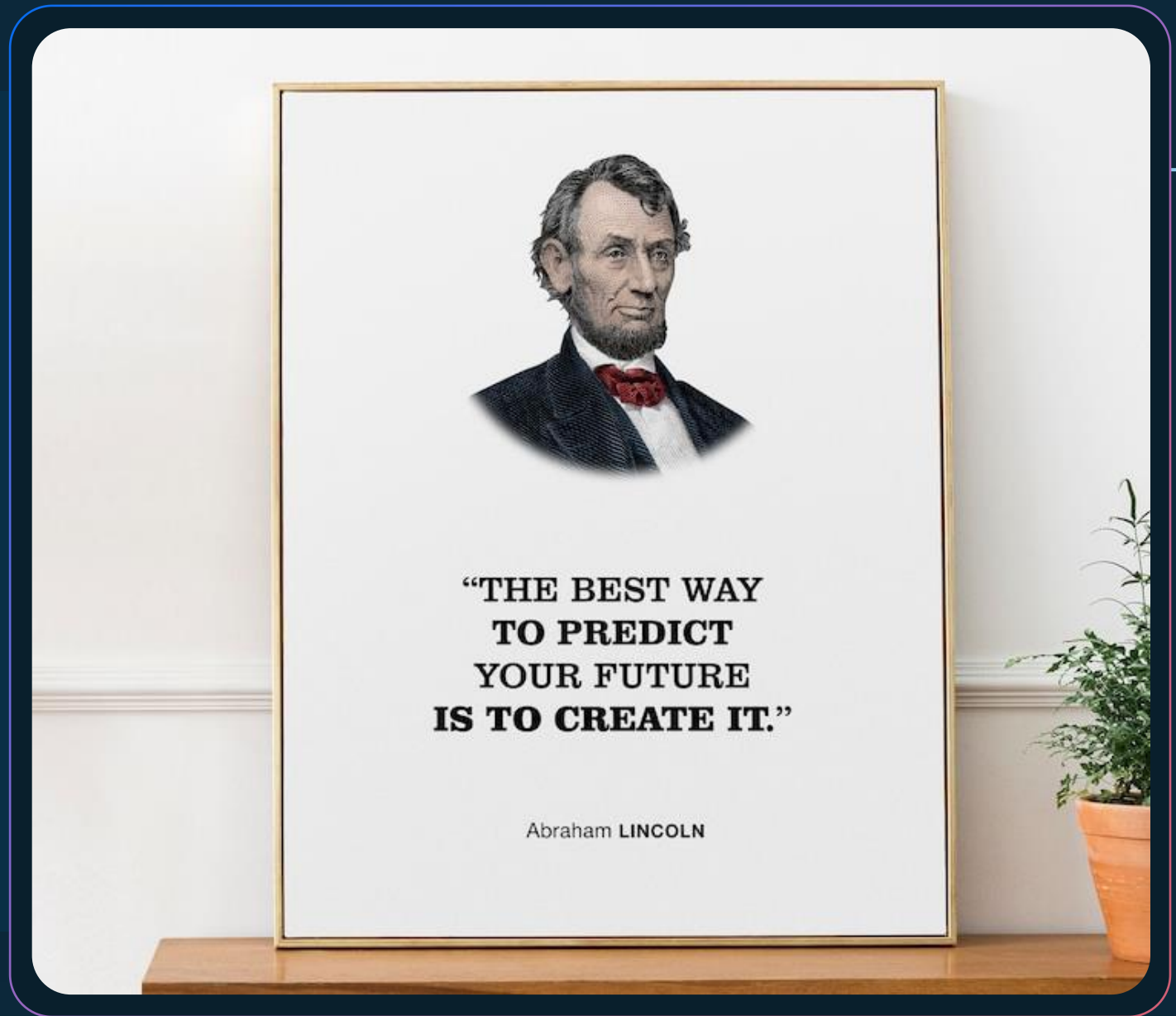




# We should listen to Abraham Lincoln\*

We should lead way.  
We cannot fear change

\* "The quote about creating the future has been attributed to Lincoln for decades, and while there is no hard proof he ever said it, the sentiment certainly matches other things President Lincoln is documented to have said," said library and museum spokesman Chris Wills. "Examples include, 'If we never try, we shall never succeed' or 'You cannot fail, if you resolutely determine that you will not.'"



# Thank you!

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**Marcio Decat**

[linkedin.com/in/marciodecat](https://www.linkedin.com/in/marciodecat)



Scan to read our blog about  
new copilot capabilities  
in D365 Field Service

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Copilot in Dynamics 365 Field Service is helping our customers

"...[a]s a platform for field service, it's helping us to improve productivity." - Salt Lake Group







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MAY 2024

