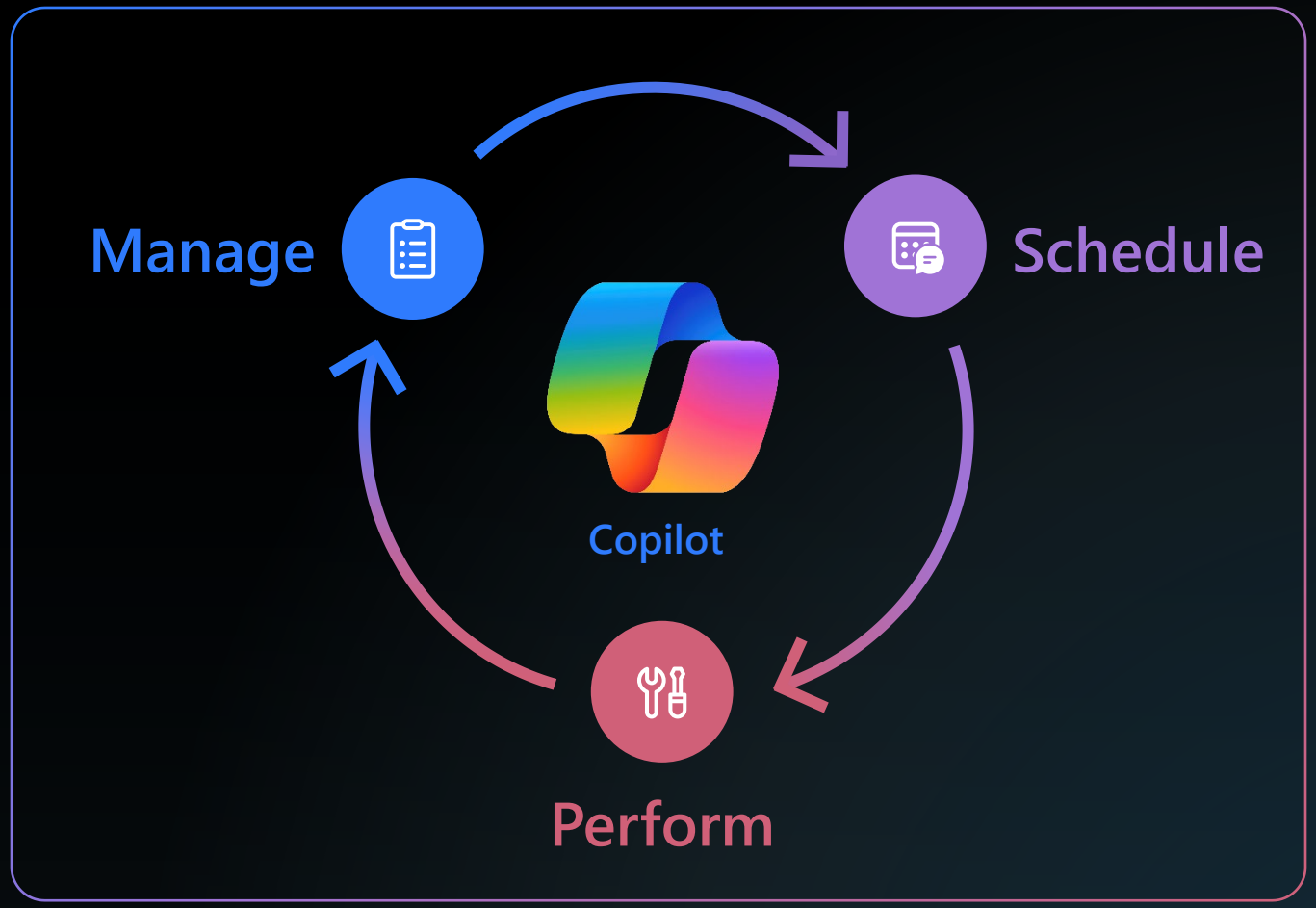
CONVERGENCE | AI + ERP
MIAMI | 2025
Smarter scheduling and faster field work with AI in Dynamics 365 Field Service
WITH DAN GITTLER & LUIS MASIERI
Sponsored By Microsoft
Hosted By DYNAMICS USER GROUP

Agenda

- Recent releases & what's coming for:
  - Frontline Technician Experience
  - Scheduling & Scheduling Agents
- Q&A

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.



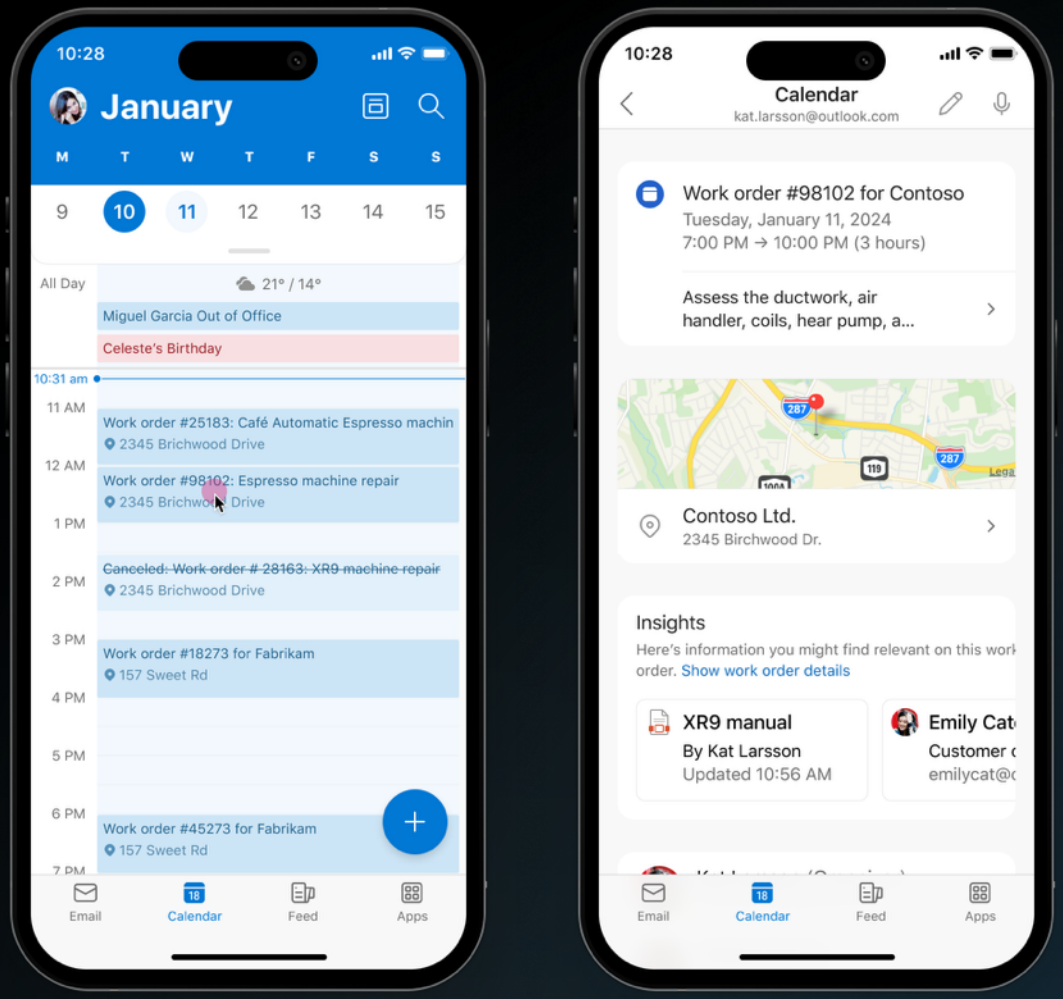
Technician Experience

Make every fix a first-time fix

Available now

Sync field work with Outlook calendars

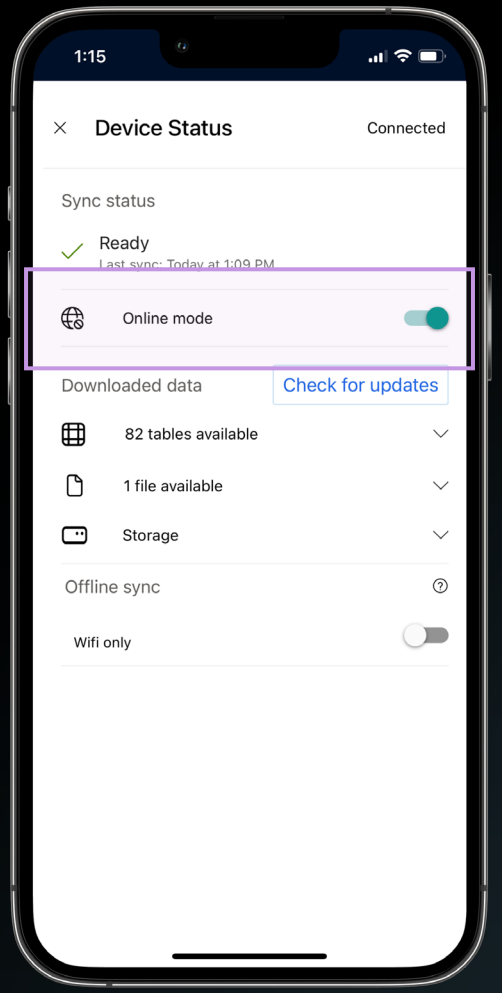
Align technician schedules with Exchange to avoid conflicts, boost visibility, and streamline time management.



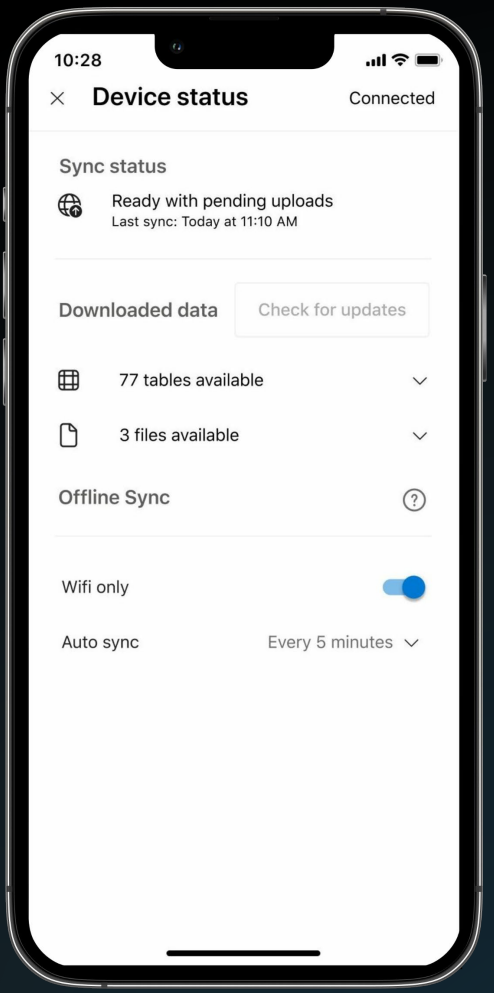
Available now

Faster And More Reliable Field Service Mobile Experience

Technicians benefit from improved location accuracy, enhanced battery performance, new offline sync controls, Online First support, and up to 70% faster cold start times.



New: Online mode toggle

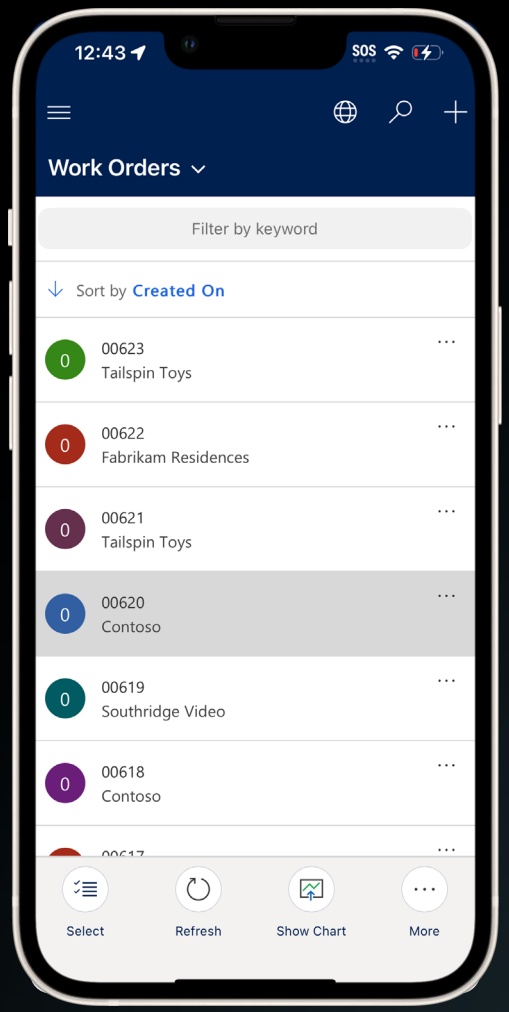


New: Improved offline sync experience

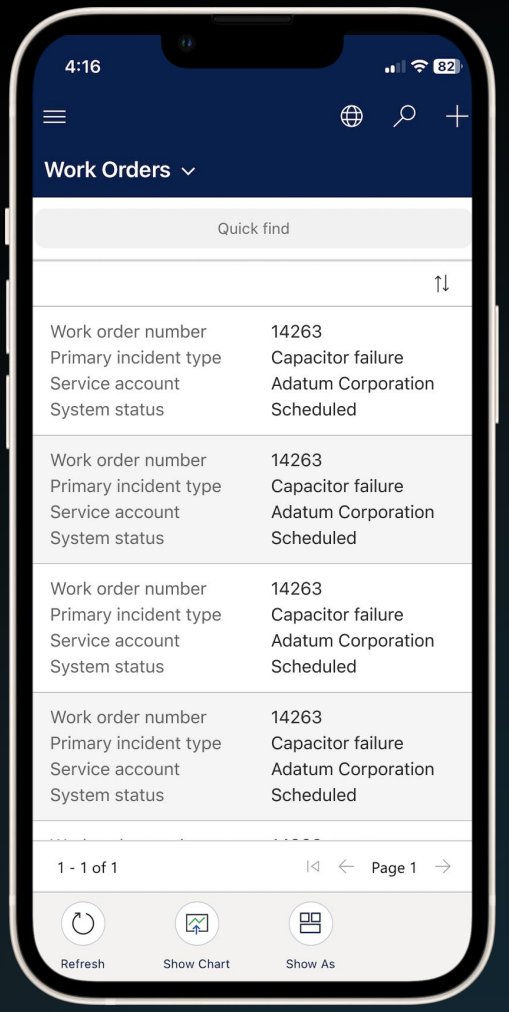
Coming soon

See More, Tap Less

High-density mobile lists that surface the right data upfront.



Before

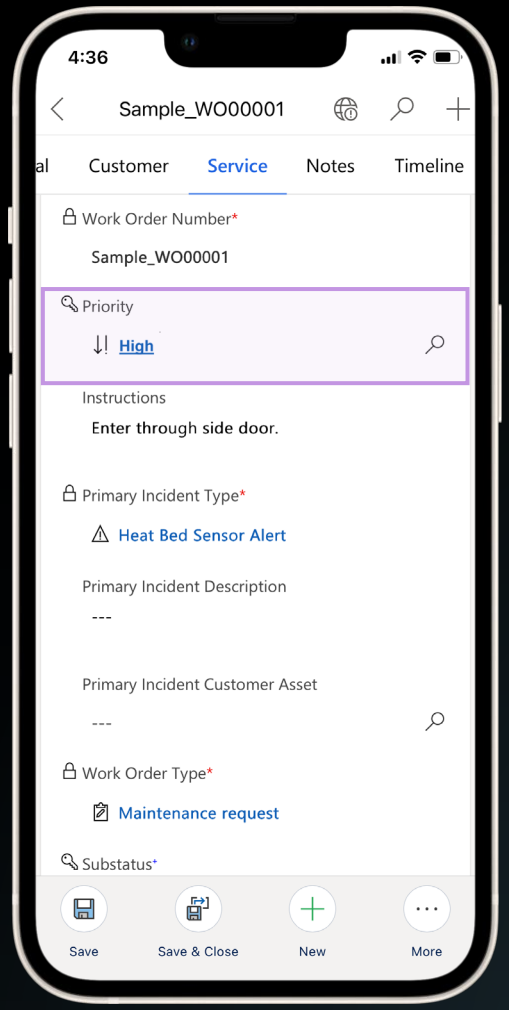


After

Coming soon

No more inadvertent clicks to dead ends

A cleaner, safer lookup experience designed for mobile realities.



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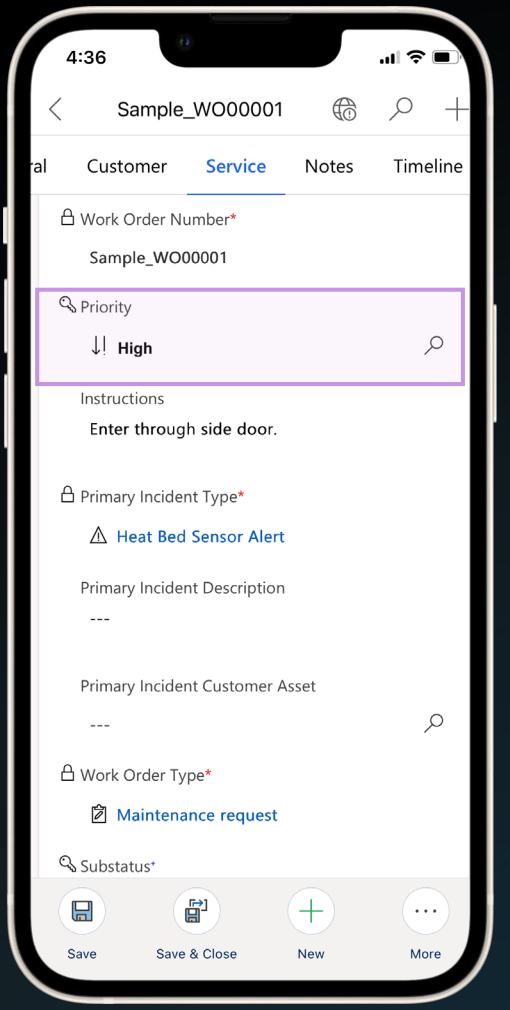
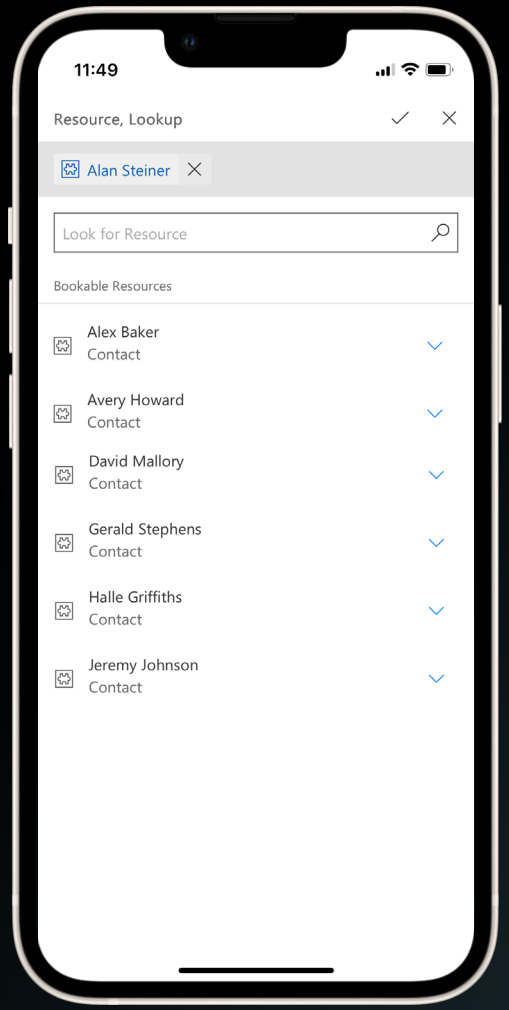


After

Coming soon

Lookups Made Easy

A streamlined, mobile-first lookup that speeds task completion.



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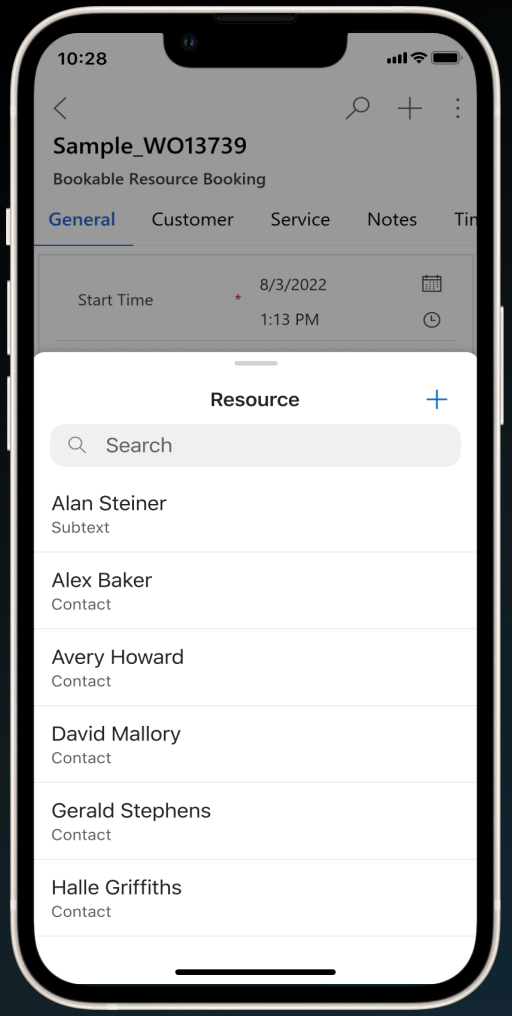
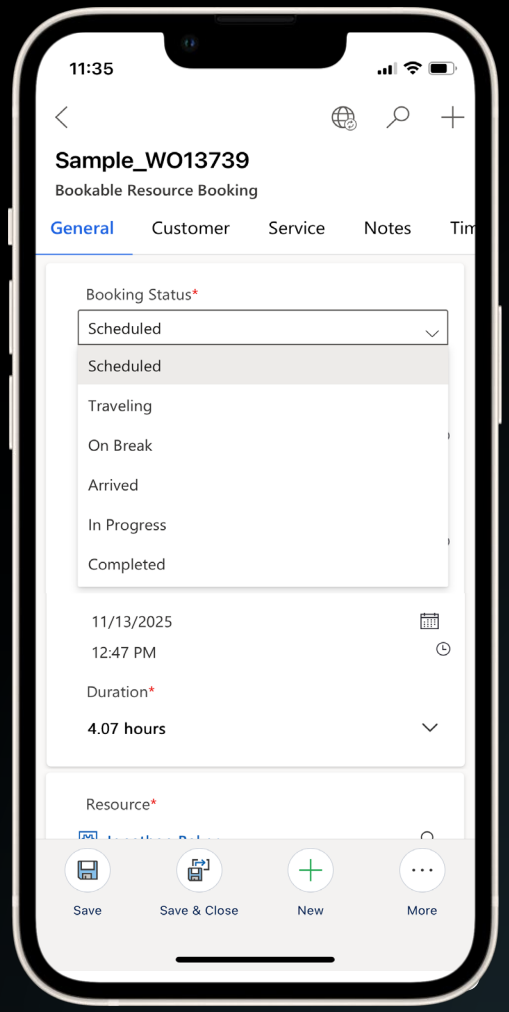


After

Coming soon

Faster Status Updates

A mobile-first status control built around tap-friendly actions.



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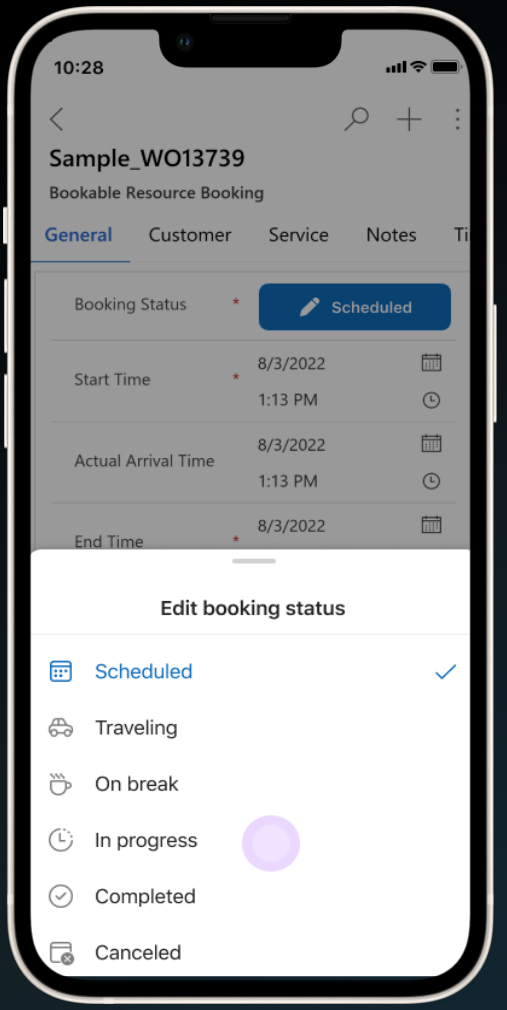
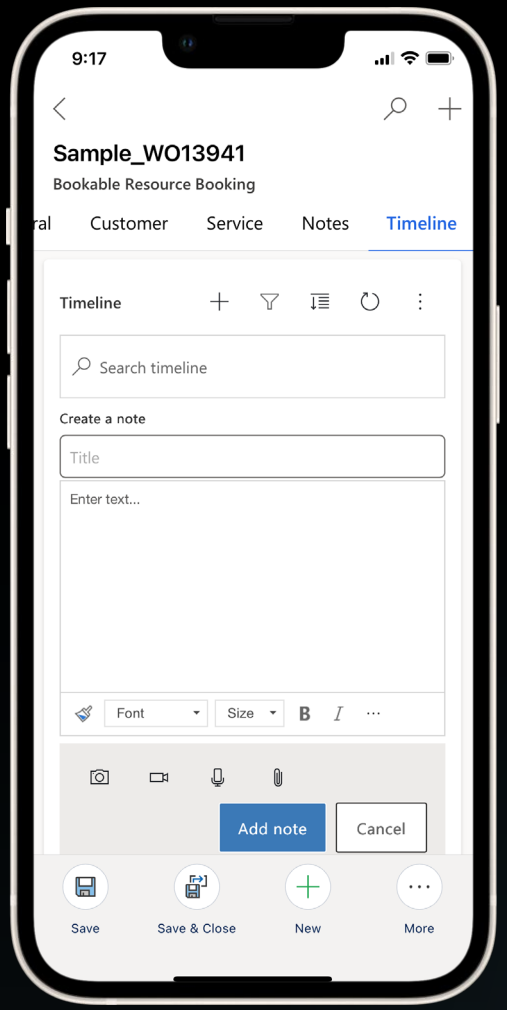


After

Coming soon

Portable Note Taking Control

Faster, richer documentation with photos, videos, and instant text.



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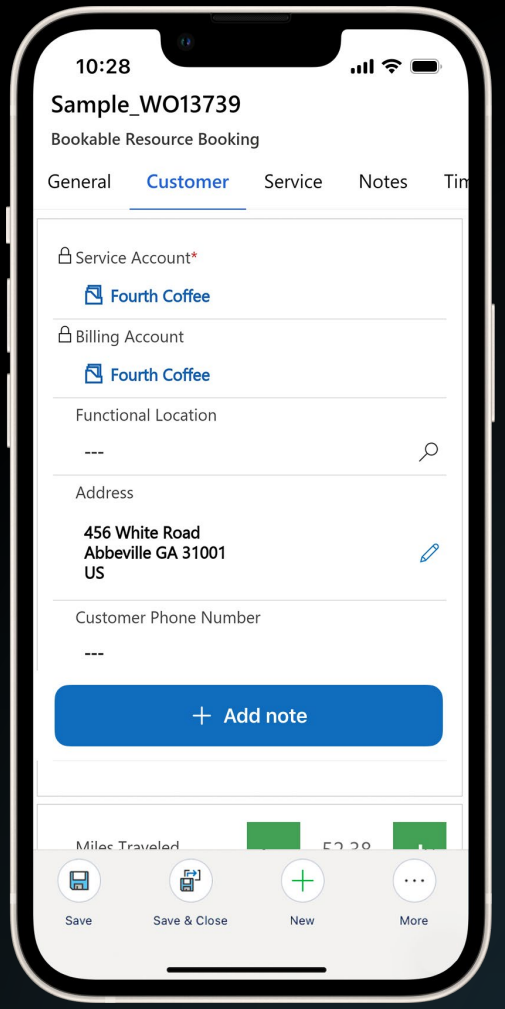
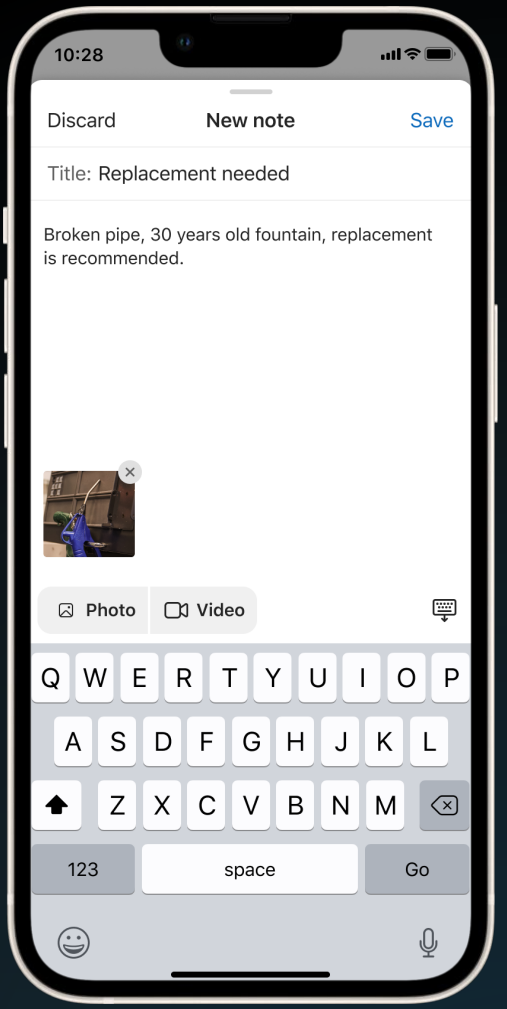




After

Coming soon

Keep technicians productive under any network condition

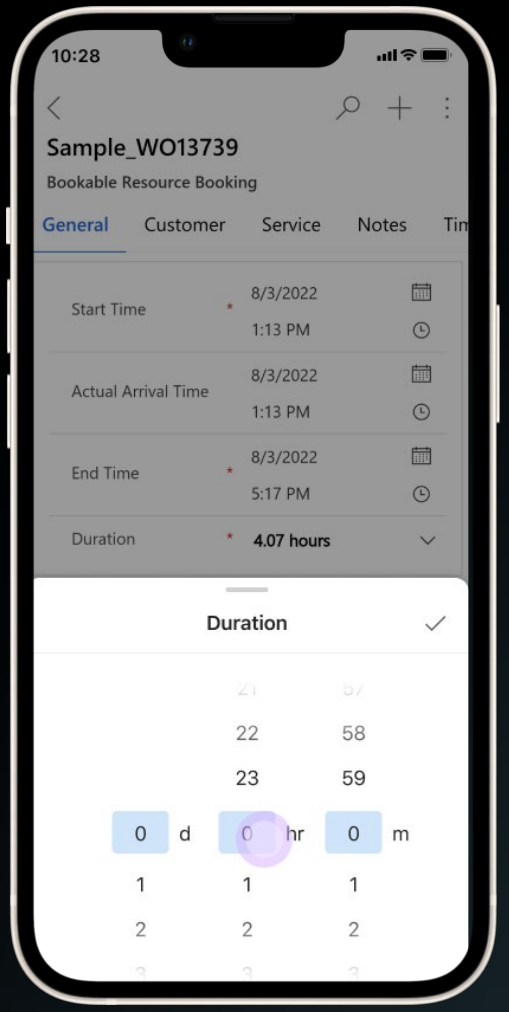
Our offline engine is being hardened for speed, reliability, and seamless sync, ensuring work continues uninterrupted in the field.

⚡ **Faster, More Reliable Syncing**	Increased performance of initial and incremental sync
	Indexing Optimization
	Custom Fetch XML Support
	Related Row Sync Support
	Server-side sync logic optimization
✨ **Streamlined App Configuration**	Offline mode with network performance improvements
	Multi-thread sync for UCI
	Unified and revamped runtime architecture
🔄 **Consistent Experience**	Support makers to create better offline profiles to improve sync
	AI Profile Editor

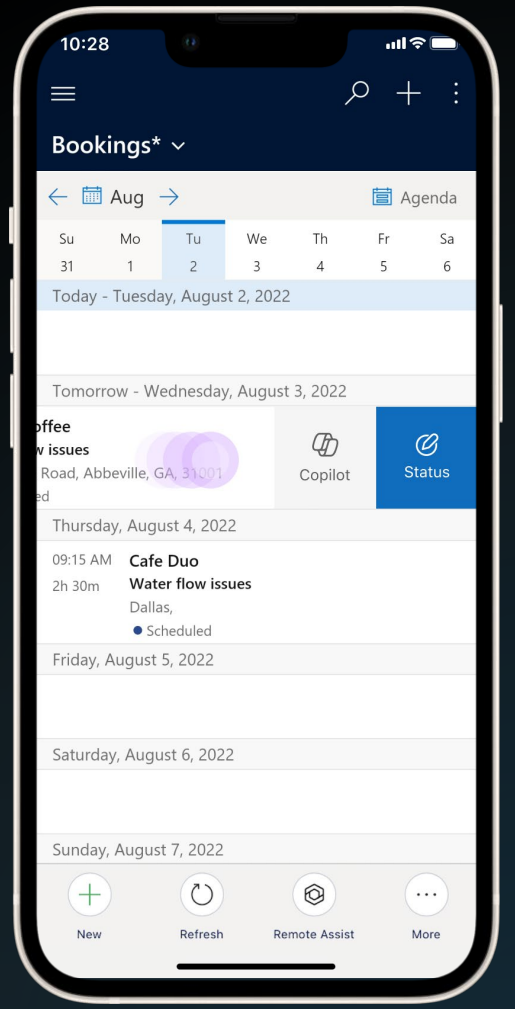
Up Next

The Road Ahead for Mobile Productivity

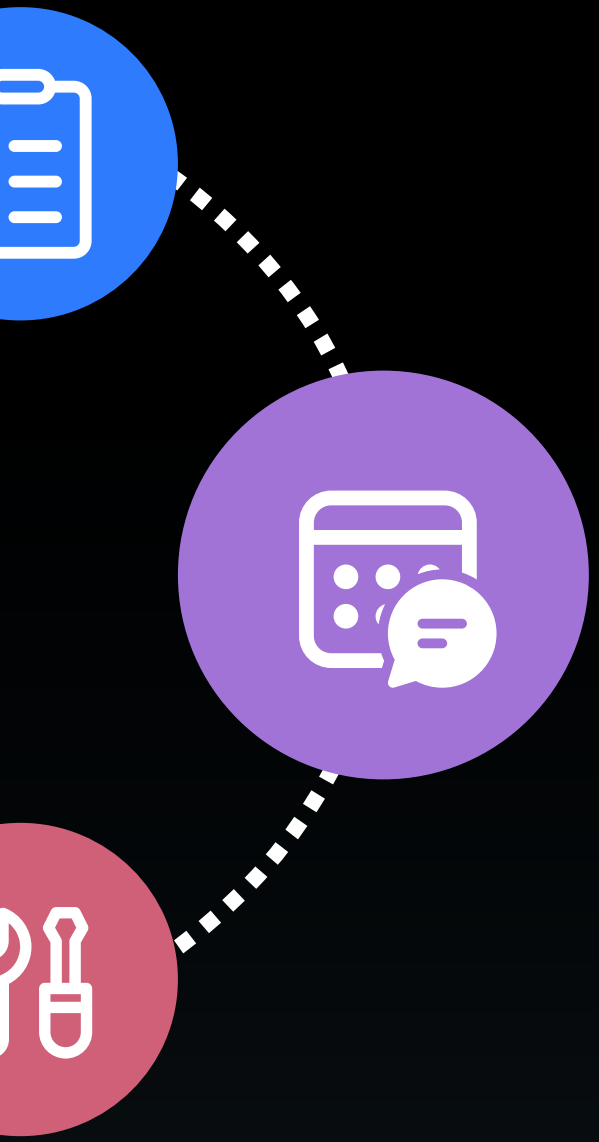
Exploring ways to reduce taps, streamline data entry, and expand technician autonomy.



Exploration: Enhanced Duration Entry



Exploration: Agenda quick actions



Scheduling

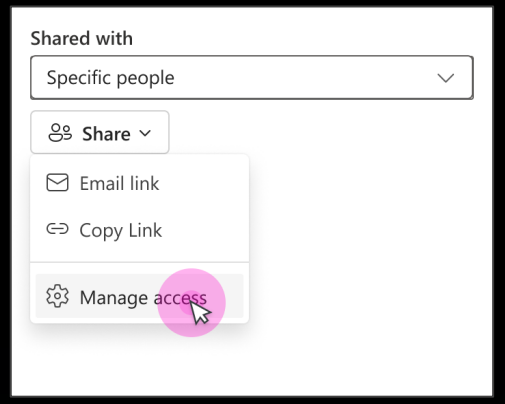
The right **Job,**
with the right **Resource,**
at the right **Time.**
Every time.

Universal Resource Scheduling – Investing in the Core

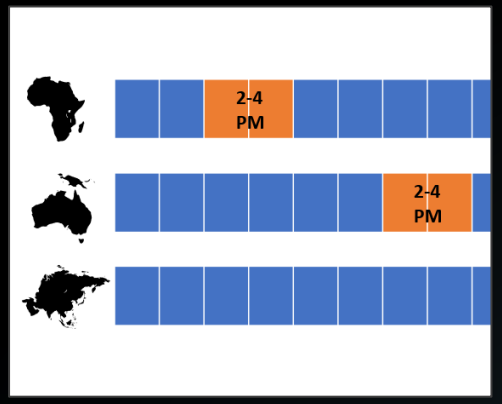
We've delivered upgrades to the scheduling board & common workflows based on your feedback.

These include:

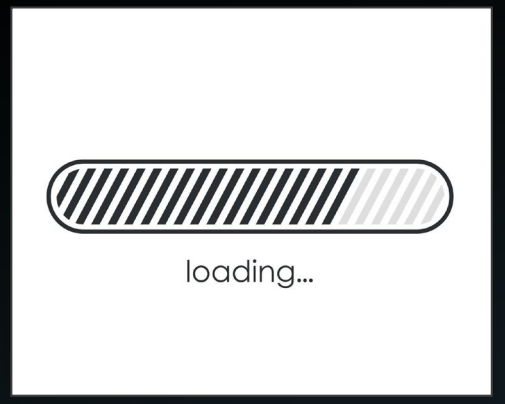
- New features!
- Usability improvements
- Performance



Easily share schedule board w/ others



Easily find a resource across time zones



Faster loading and booking performance

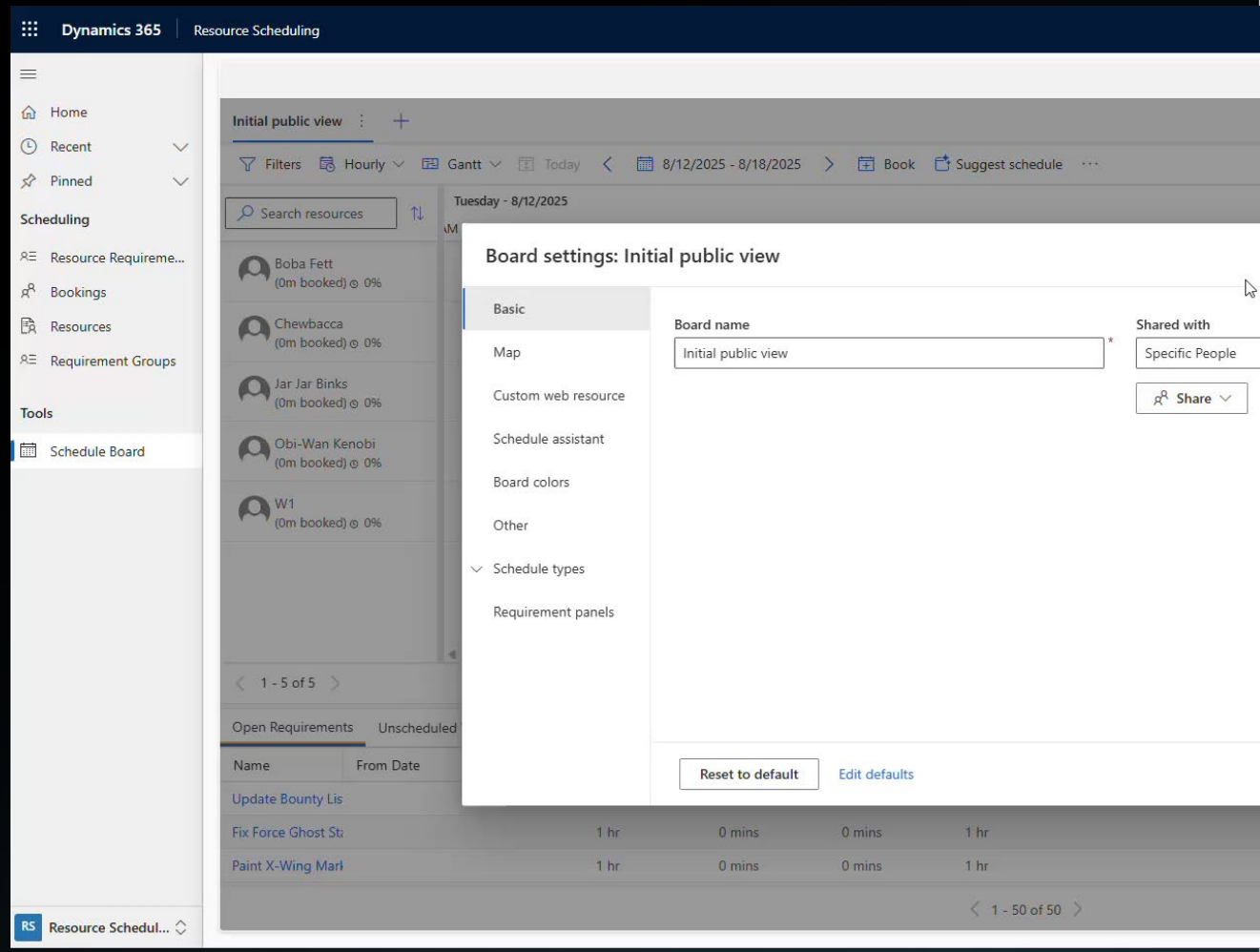
And there's more!

- Visual improvement for short bookings
- Simple address entry for organizational units
- Satellite added to the Map View
- Days of the week dropdown on SB
- Context menu icon visibility

Available now

Share schedule board views and stay aligned

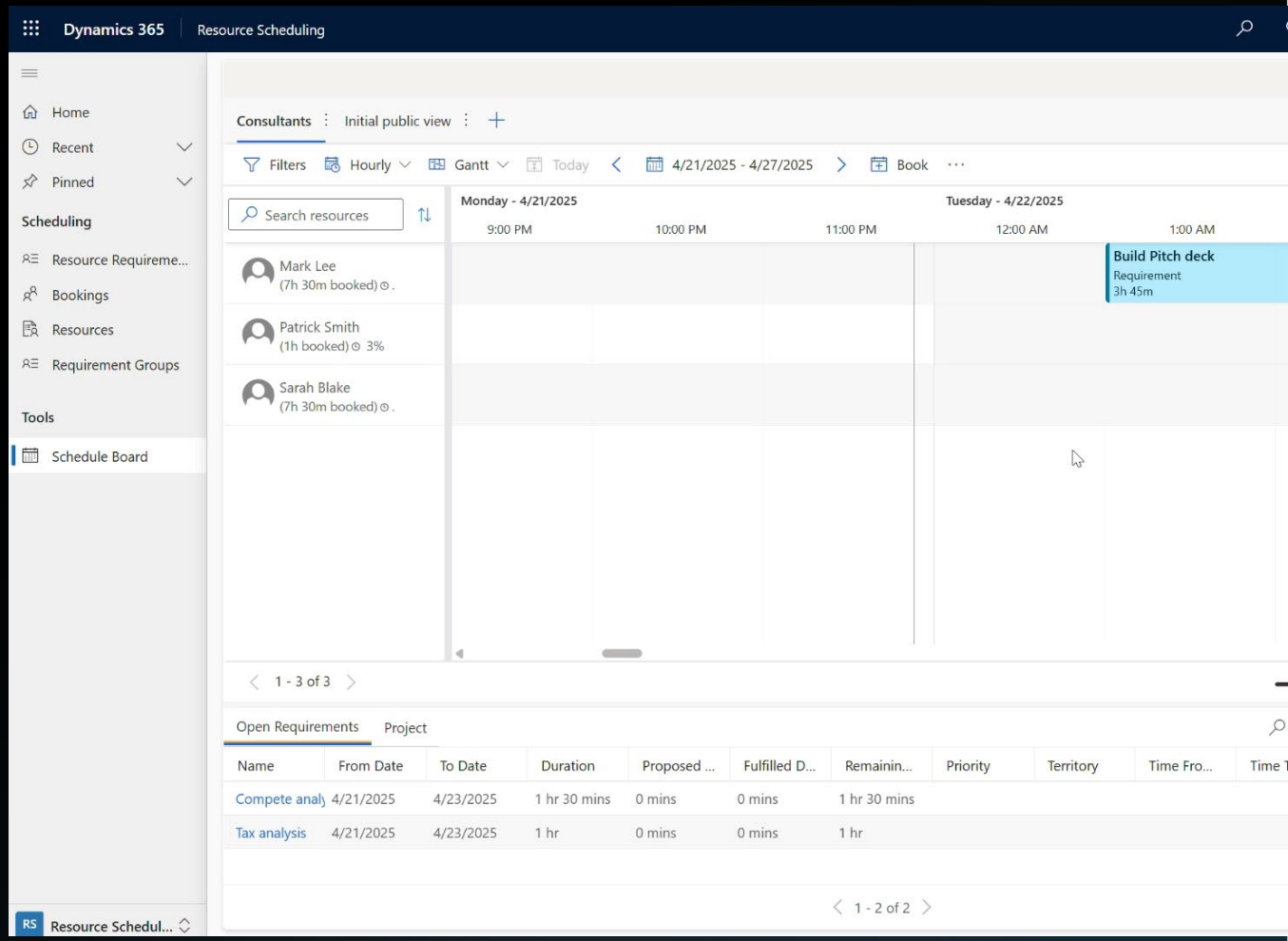
Sharing made simple. Give your team instant access to schedule boards so collaboration flows.



Available now

Need to book resources across time zones? No problem

Seamless global scheduling. We take the hassle out of time zones, so your team stays perfectly aligned - wherever they work.



Available now

Performance that keeps up with your operations

Improvements across booking creation, resource search, and cold load times help dispatchers move faster throughout the day.

60% Faster Create Booking time

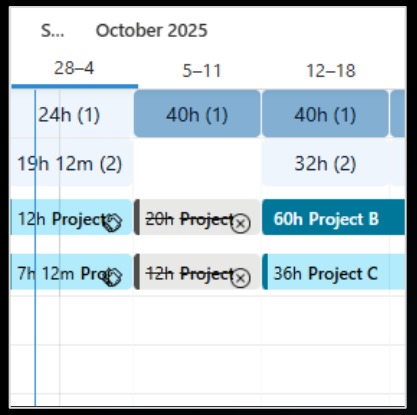
50% Faster Schedule Assistant searches

30% Faster Schedule Board Cold Load

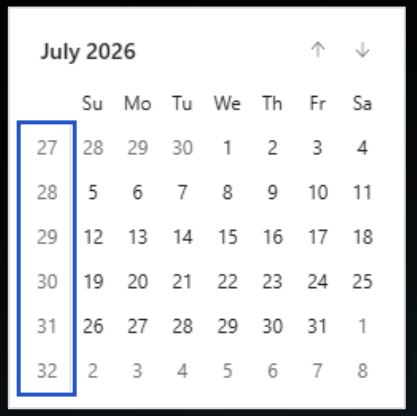
Coming soon

More improvements to the schedule board

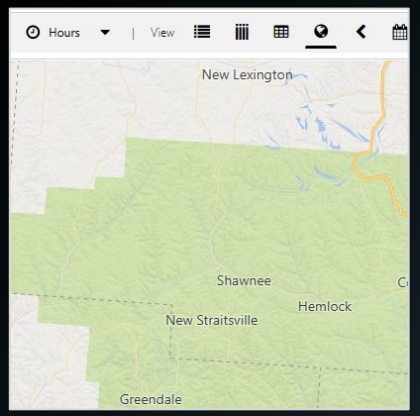
Streamlined design and performance upgrades make everyday dispatching quicker and more intuitive.



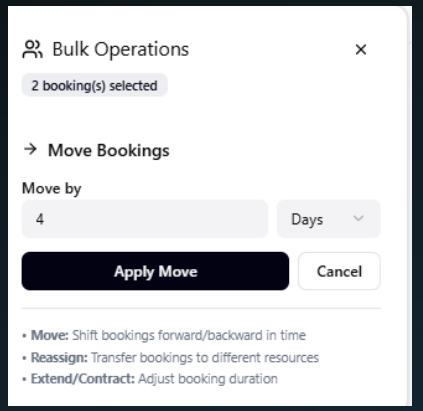
Easily modify portions of a multiday bookings



Week numbers on the schedule board



Map mode in full screen on the board

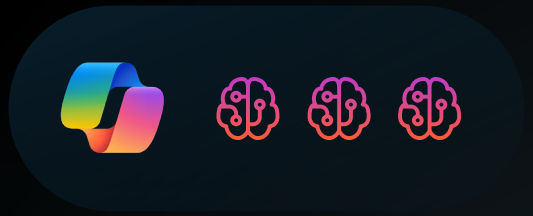


Bulk move booking on the schedule

The Future of Scheduling

Operational Research

+



Copilot & Agents

Faster, more efficient scheduling with Agents

Scheduling Agents will significantly improve dispatcher efficiency & effectiveness by streamlining their workflows and productivity.

Scheduling agents will work across three categories:

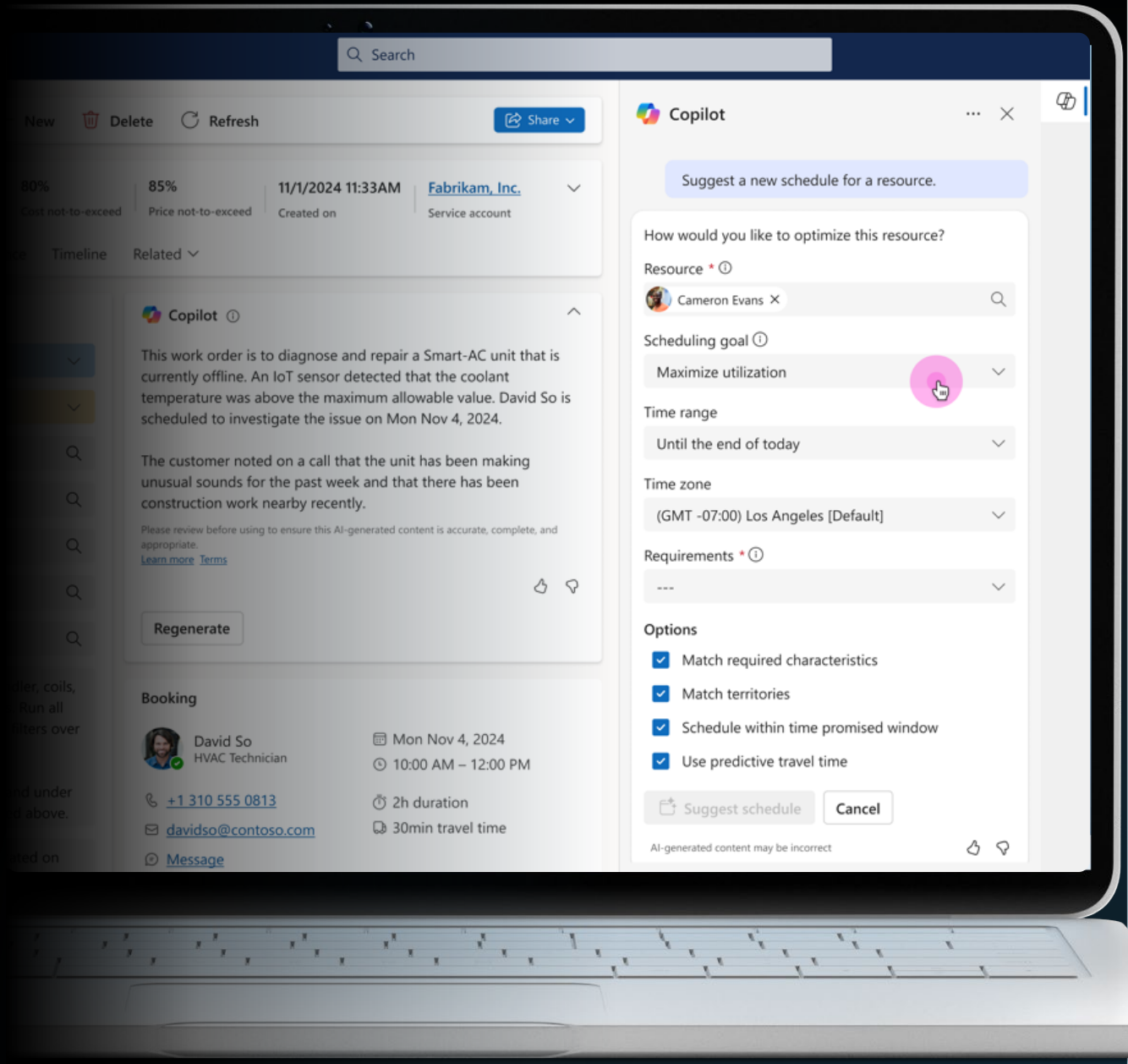
Scheduling Agents		
User-initiated	**Autonomous w/ User Input**	**Fully Autonomous**
Initiated by the dispatcher: "Copilot, optimize the schedule for this technician today to maximize utilization."	**Recommended by Agent:** "Agent has discovered scheduling issues and a recommended fix."	**Actioned by Agent:** "Agent has made improvements to the schedule."
"Request → Review → Apply"	**"Review → Apply"**	**"Apply → Monitor & Refine"**

Microsoft

Available now

Adapt schedules in real-time with the Scheduling Operations Agent

Automatically optimize technician assignments as priorities shift — no manual reshuffling needed.



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Microsoft

Smarter Scheduling, Better Outcomes

Increase Operational Efficiency

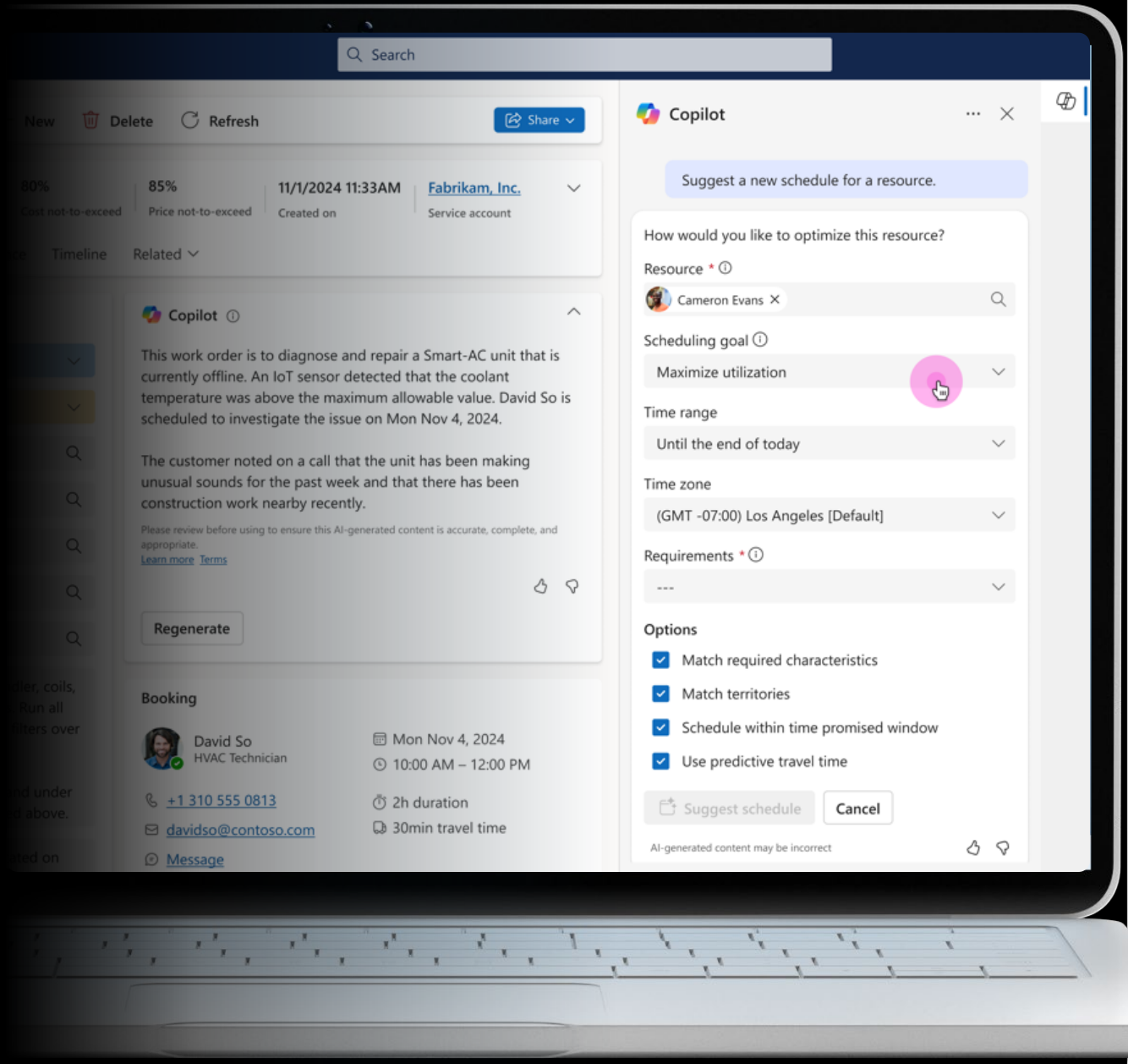
Reducing the time spent manually scheduling and addressing errors.

Higher Technician Utilization

Spend less time travel and get more jobs done per day per technician.

Faster Decision-Making

Easily compare the optimizations before committing the change to the schedule.



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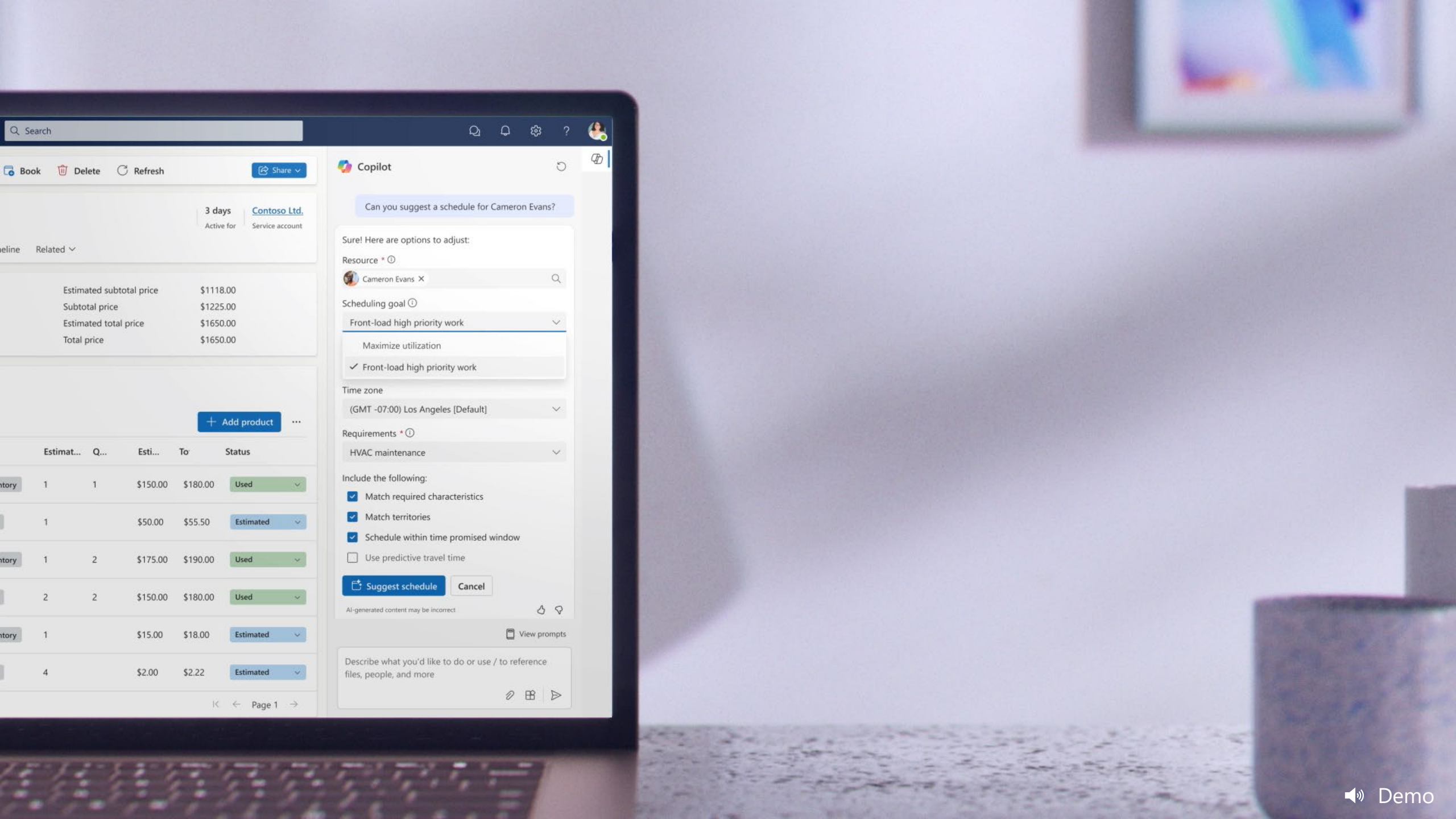
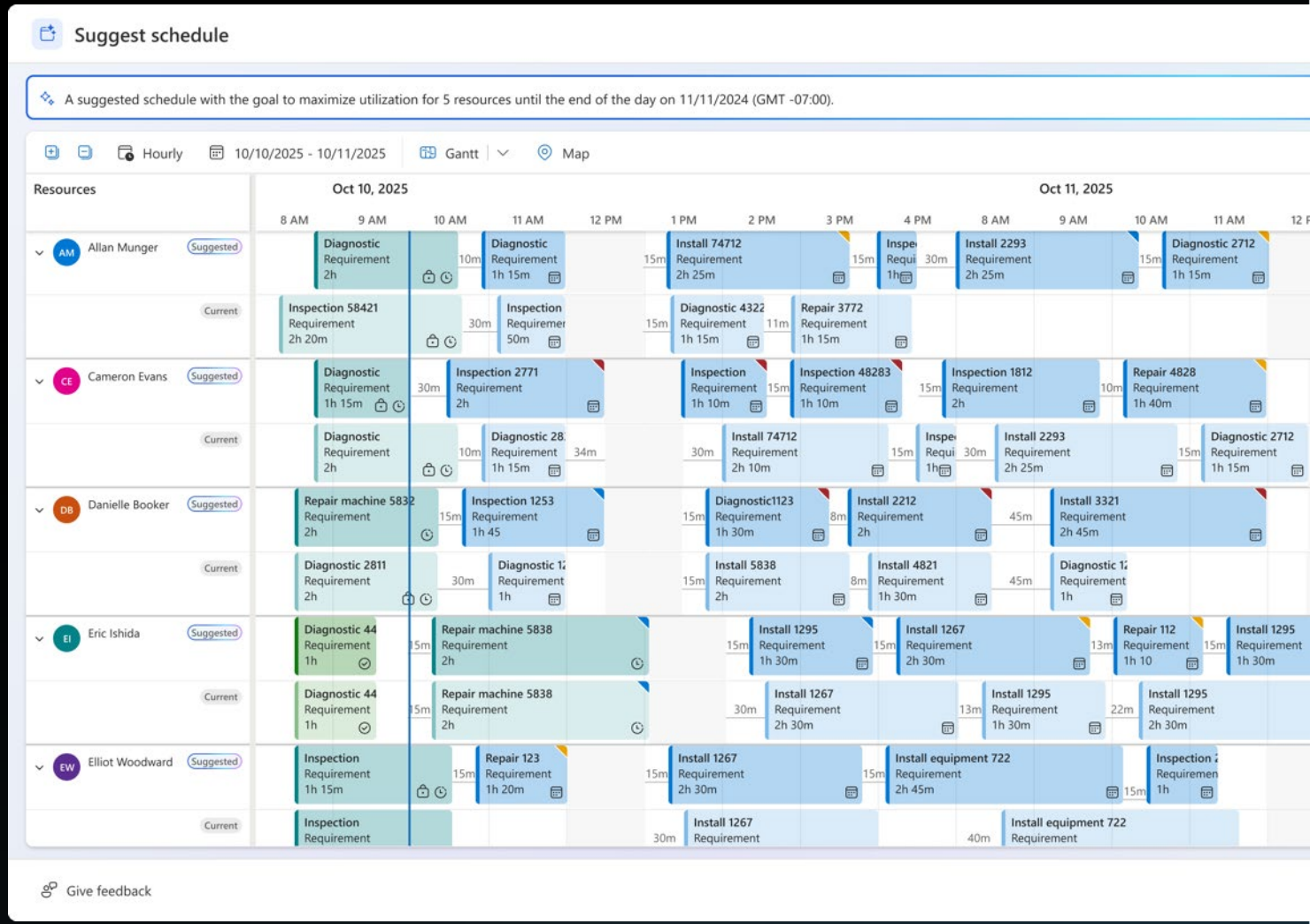

Search
Book
Delete
Refresh
Share
3 days
Active for
Contoso Ltd.
Service account
Related
Estimated subtotal price $1118.00
Subtotal price $1225.00
Estimated total price $1650.00
Total price $1650.00
Add product
Estimat...
Q...
Esti...
To
Status
$150.00 $180.00 Used
$50.00 $55.50 Estimated
$175.00 $190.00 Used
$150.00 $180.00 Used
$15.00 $18.00 Estimated
$2.00 $2.22 Estimated
Page 1
Copilot
Can you suggest a schedule for Cameron Evans?
Sure! Here are options to adjust:
Resource *
Cameron Evans
Scheduling goal
Front-load high priority work
Maximize utilization
Front-load high priority work
Time zone
(GMT -07:00) Los Angeles [Default]
Requirements *
HVAC maintenance
Include the following:
Match required characteristics
Match territories
Schedule within time promised window
Use predictive travel time
Suggest schedule
Cancel
AI-generated content may be incorrect
View prompts
Describe what you'd like to do or use / to reference files, people, and more

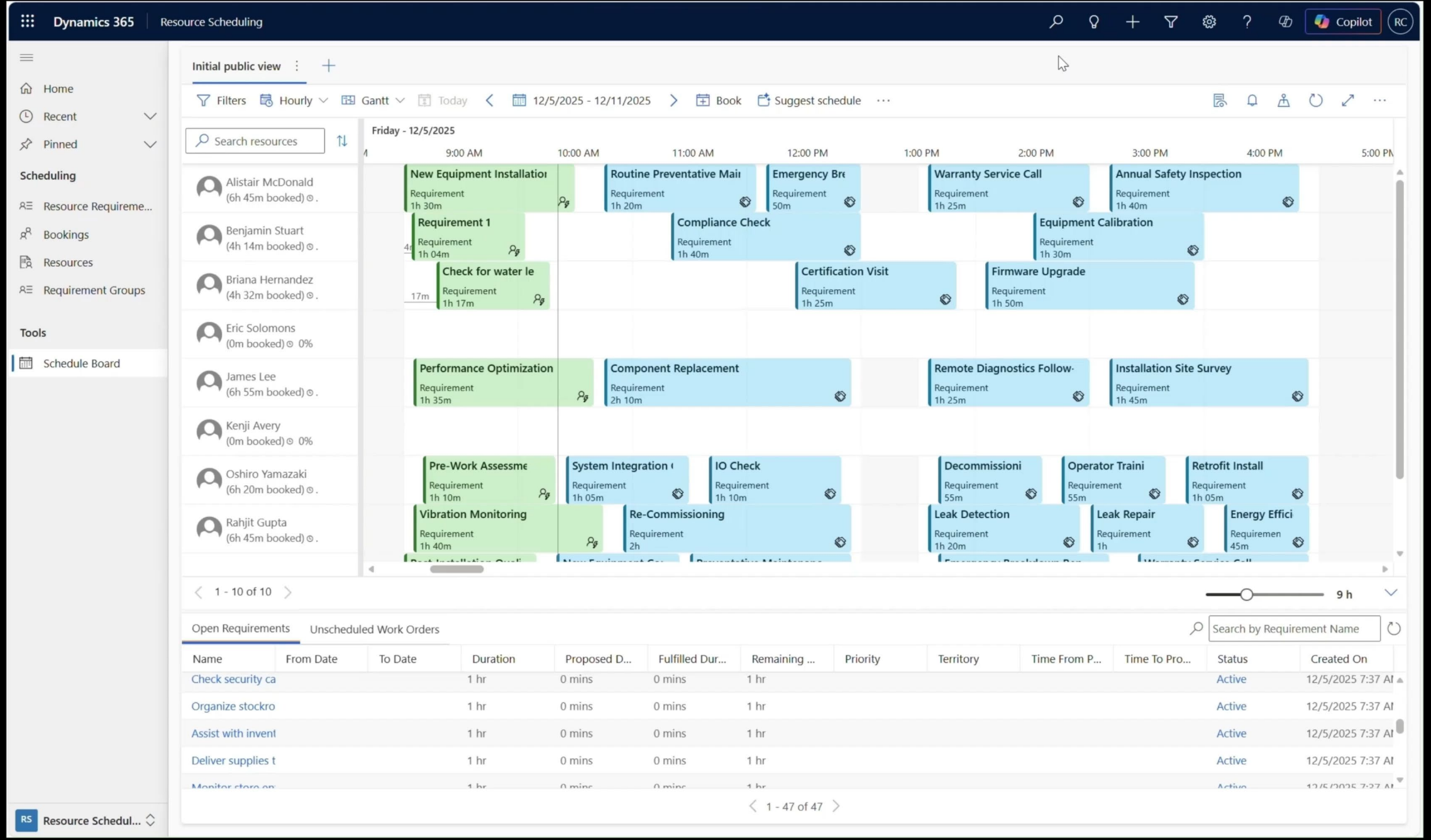
Demo

Coming soon

Optimize schedules for your whole team, in one click

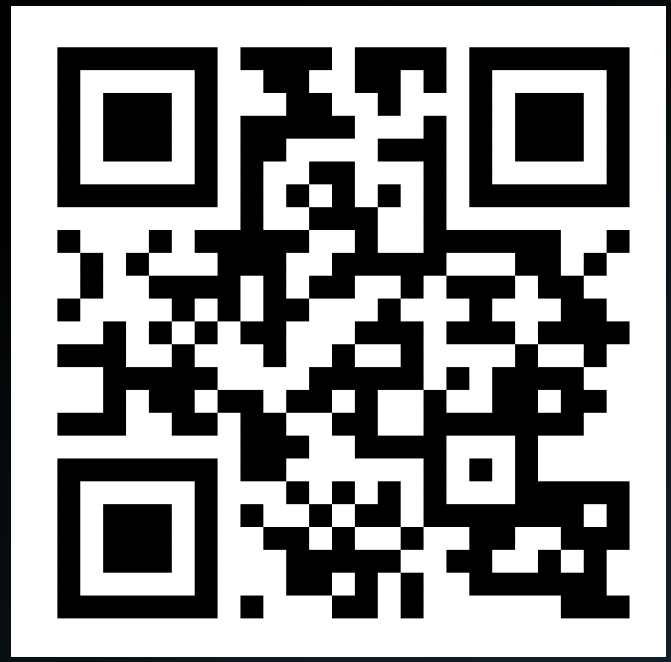
Select, schedule, and adjust multiple technicians with smarter routing, faster performance, and Copilot-guided ease.




Dynamics 365
Resource Scheduling
Copilot
RC
Home
Recent
Pinned
Scheduling
Resource Requireme...
Bookings
Resources
Requirement Groups
Tools
Schedule Board
Resource Schedul...
Initial public view
Filters
Hourly
Gantt
Today
12/5/2025 - 12/11/2025
Book
Suggest schedule
Search resources
Friday - 12/5/2025
9:00 AM
10:00 AM
11:00 AM
12:00 PM
1:00 PM
2:00 PM
3:00 PM
4:00 PM
5:00 PM
Alistair McDonald (6h 45m booked)
Benjamin Stuart (4h 14m booked)
Briana Hernandez (4h 32m booked)
Eric Solomons (0m booked) 0%
James Lee (6h 55m booked)
Kenji Avery (0m booked) 0%
Oshiro Yamazaki (6h 20m booked)
Rahjit Gupta (6h 45m booked)
New Equipment Installatio
Requirement
1h 30m
Routine Preventative Mai
Requirement
1h 20m
Emergency Bre
Requirement
50m
Warranty Service Call
Requirement
1h 25m
Annual Safety Inspection
Requirement
1h 40m
Requirement 1
Requirement
1h 04m
Compliance Check
Requirement
1h 40m
Equipment Calibration
Requirement
1h 30m
Check for water le
Requirement
1h 17m
Certification Visit
Requirement
1h 25m
Firmware Upgrade
Requirement
1h 50m
Performance Optimization
Requirement
1h 35m
Component Replacement
Requirement
2h 10m
Remote Diagnostics Follow
Requirement
1h 25m
Installation Site Survey
Requirement
1h 45m
Pre-Work Assessme
Requirement
1h 10m
System Integration
Requirement
1h 05m
IO Check
Requirement
1h 10m
Decommissioni
Requirement
55m
Operator Traini
Requirement
55m
Retrofit Install
Requirement
1h 05m
Vibration Monitoring
Requirement
1h 40m
Re-Commissioning
Requirement
2h
Leak Detection
Requirement
1h 20m
Leak Repair
Requirement
1h
Energy Effici
Requiremen
45m
1 - 10 of 10
9 h
Open Requirements
Unscheduled Work Orders
Search by Requirement Name
Name
From Date
To Date
Duration
Proposed D...
Fulfilled Dur...
Remaining ...
Priority
Territory
Time From P...
Time To Pro...
Status
Created On
Check security ca
Organize stockro
Assist with invent
Deliver supplies t
1 hr
0 mins
Active
12/5/2025 7:37 AM
1 - 47 of 47

Try the now in Public Preview!

Use the Scheduling Operations Agent on your schedules today! It's simple to setup and get started.



Get started at aka.ms/soa

Got feedback? We want to hear from you aka.ms/soafeedback

Optimism

for AI & tech

65%

of frontline workers are optimistic AI will help them in their jobs

Source: https://www.microsoft.com/en-us/worklab/work-trend-index/will-ai-fix-work

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QUESTIONS
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