

CONVERGENCE

AI+
ERP

MIAMI | 2025

Transforming service delivery with Dynamics 365 Field Service

WITH DAN GITTLER & LUIS MASIERI

Sponsored By  Microsoft

Hosted By  DYNAMICS
USER GROUP

Agenda

- State of Field Service
- The Future of Field Service
- Customer Momentum
- Q&A

State of Field Service

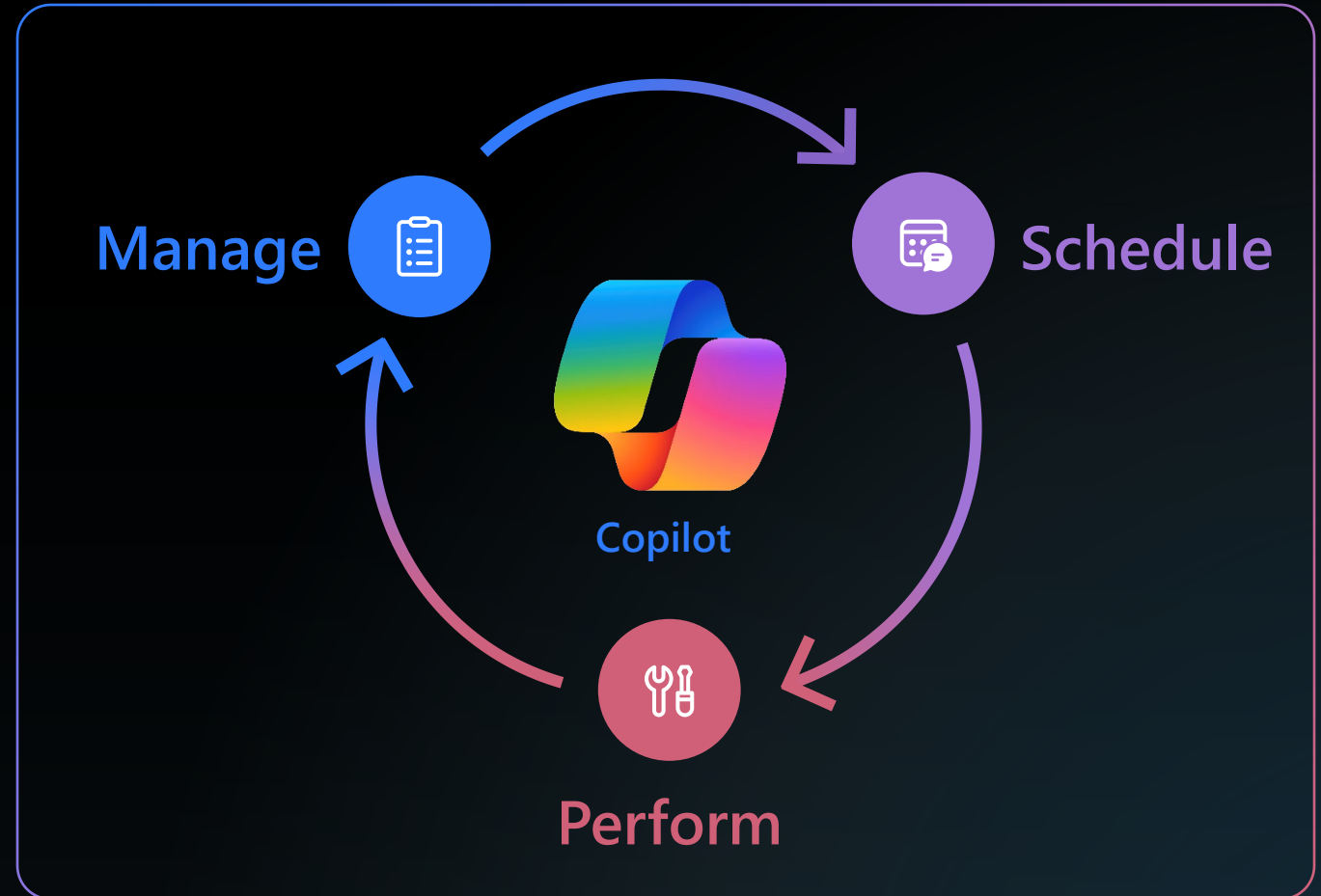
Bridging the physical and digital

Field Service – Where Customer Experience and ERP Meet



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.



The frontline workforce is ready for a digital transformation with Gen AI

Training and
skilling gap

55%

of frontline workers had to adapt to using digital tools on the fly without training

Repetitive tasks
& paperwork

63%

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

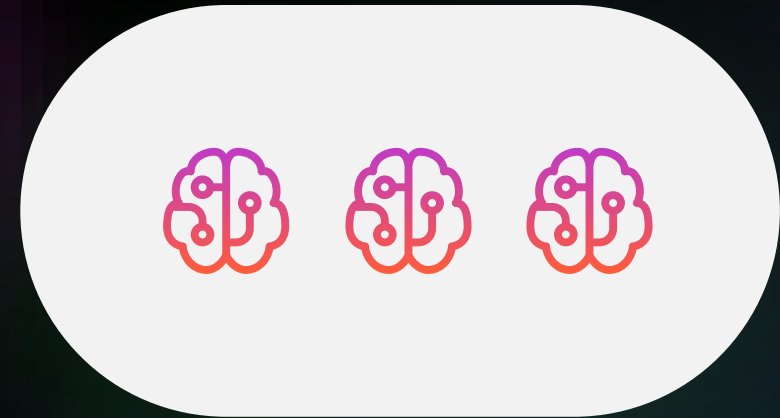
Information
search

80%

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

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

AI shift is transforming how we work



AI shift is transforming how we work



Apps as UI •



Copilot as UI

AI shift is transforming how we work



Apps as UI



Copilot as UI

Workflows



Agents

AI shift is transforming how we work



Apps as UI ●

● Copilot as UI

Workflows ●

● Agents

Data ●

● Knowledge

The Future of Field Service

AI-powered. **Technician-first**. Built for what's next.

Field Service Major GA Features 2023-2025

Empower frontline workers

Field Service Mobile App

- New, intuitive user experience
- Refreshed Agenda view for bookings
- Configurable list views
- Easily switch EntraID tenants
- Improved geo-location tracking
- Upload multiple images to inspections
- Compressed image uploads
- Improved signature control for customer signoff

Copilot on Mobile

- Update work orders with your voice
- Summarize work orders with Copilot

Mixed Reality

- Access to 2D guides on mobile app
- Remote Assist annotations in Teams
- Access Remote Assist from Teams

Offline Management

- Select table columns for offline sync
- Monitor offline sync status
- Sync settings configurable per user
- View offline data with App Insights
- Performance & memory optimization
- Online data access in offline-first mode

Optimize service operations

Work Order Management

- New/improved work order experience
- Extended customer detail view
- Facility management enhancements
- Complete work orders & bookings with status logic
- Customize work order experience
- Manage worker certifications
- Manage postal codes globally

Copilot on the Web

- Configure Copilot summaries
- Enhance Copilot on web app
- Generate inspections from PDFs
- Copilot Sidecar improvements

Admin & Platform

- Get update faster with monthly channel
- Enhanced license monitoring
- Contractor SKU support

Integrations

- Connect Field Service with Business Central
- Connect Field Service with Dynamics 365 Finance & Operations

Resource scheduling

AI & Scheduling Optimization

- Scheduling Operations Agent
- Single Resource Optimization (SRO) improvements

Improved user experience

- Exchange sync for appointments
- New schedule board for all users
- Break down complex/long-duration bookings
- Manage daily crew membership
- Optimize navigation on schedule board
- Show proportional bookings on multiday views
- Multi-day scheduling support
- Multiple recurrences in calendar

Microsoft 365 apps Integration

- Collaborate on work orders via Teams
- Generate summaries and responses in Outlook
- Integrate Planner tasks with Field Service
- Customize work order views in Teams & Outlook
- Create work orders in Outlook using AI
- Get scheduling recommendations in Teams & Outlook
- Homepage improvements in Teams
- M365 Chat: Ask about work order info, get technician insights

FY26 priorities



Fundamental and stay secure initiative

Continue focus on customer and service health by focusing on security, monitoring & alerting, test automation, and platform standardization



Core Product Evolution

Evolve core product capabilities, usability, and deepen workflows and integration within the Dynamics 365 portfolio



Evolve Field Service with Copilot and Agents

Continue to infuse FS across back office and technicians with Gen-AI and Agents that transform productivity with new capabilities



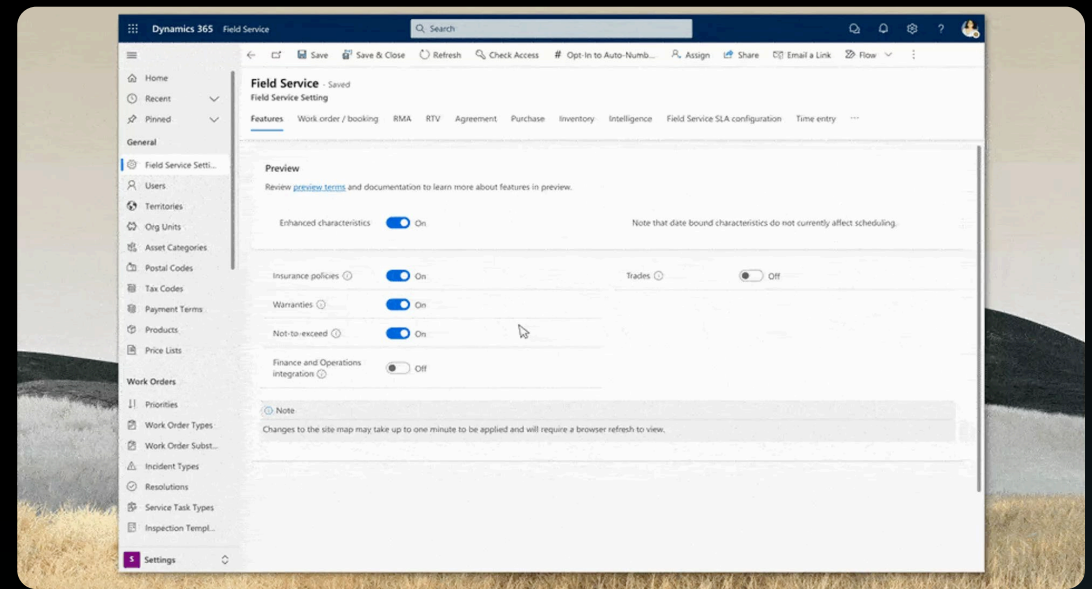
Scheduling Operations Agent

Provide optimization through a suite of entry points. Including: user-initiated, autonomous with user input, and full autonomous agents

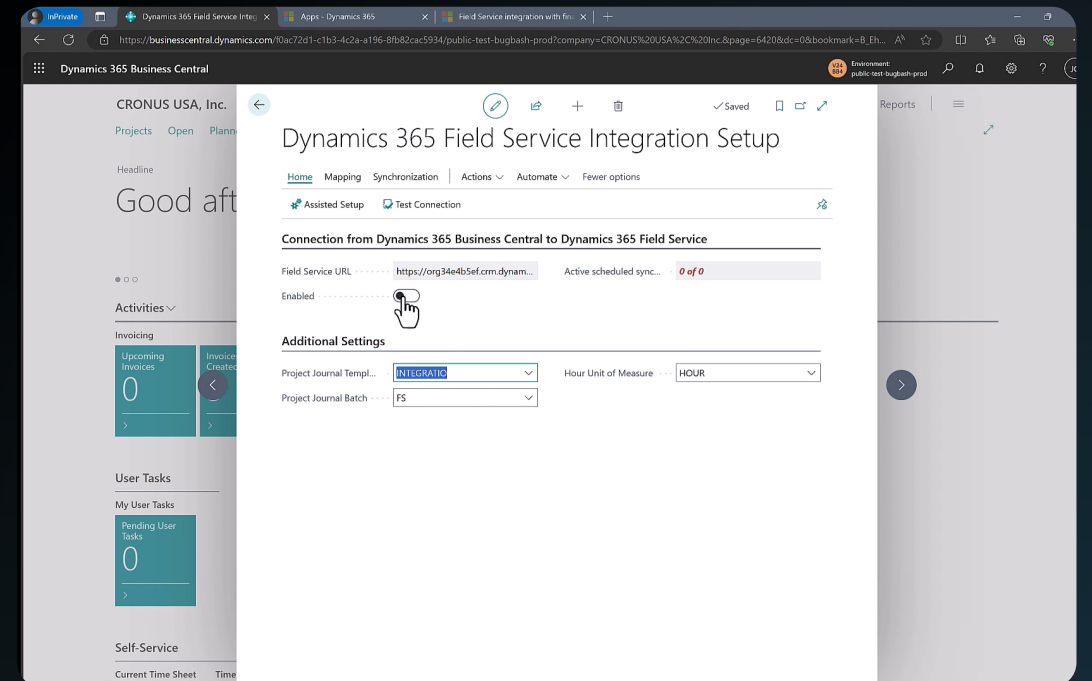
Available now

Connect Field Service to your ERP backbone

Ensure every job, part, and invoice syncs with your ERP—so financials, inventory, and operations flow seamlessly together.



Field Service & Finance & Operations Native Integration

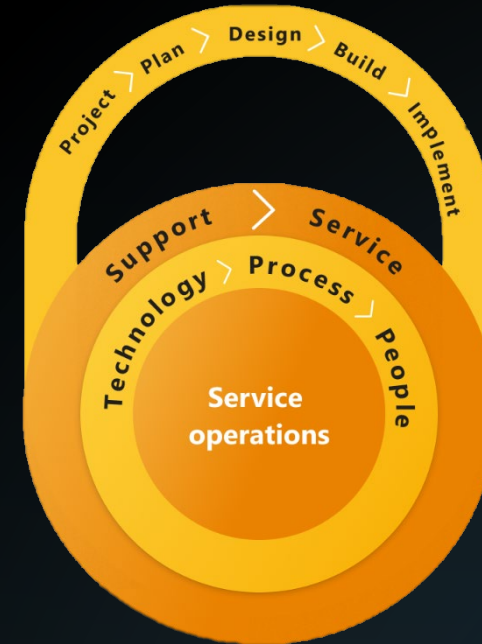


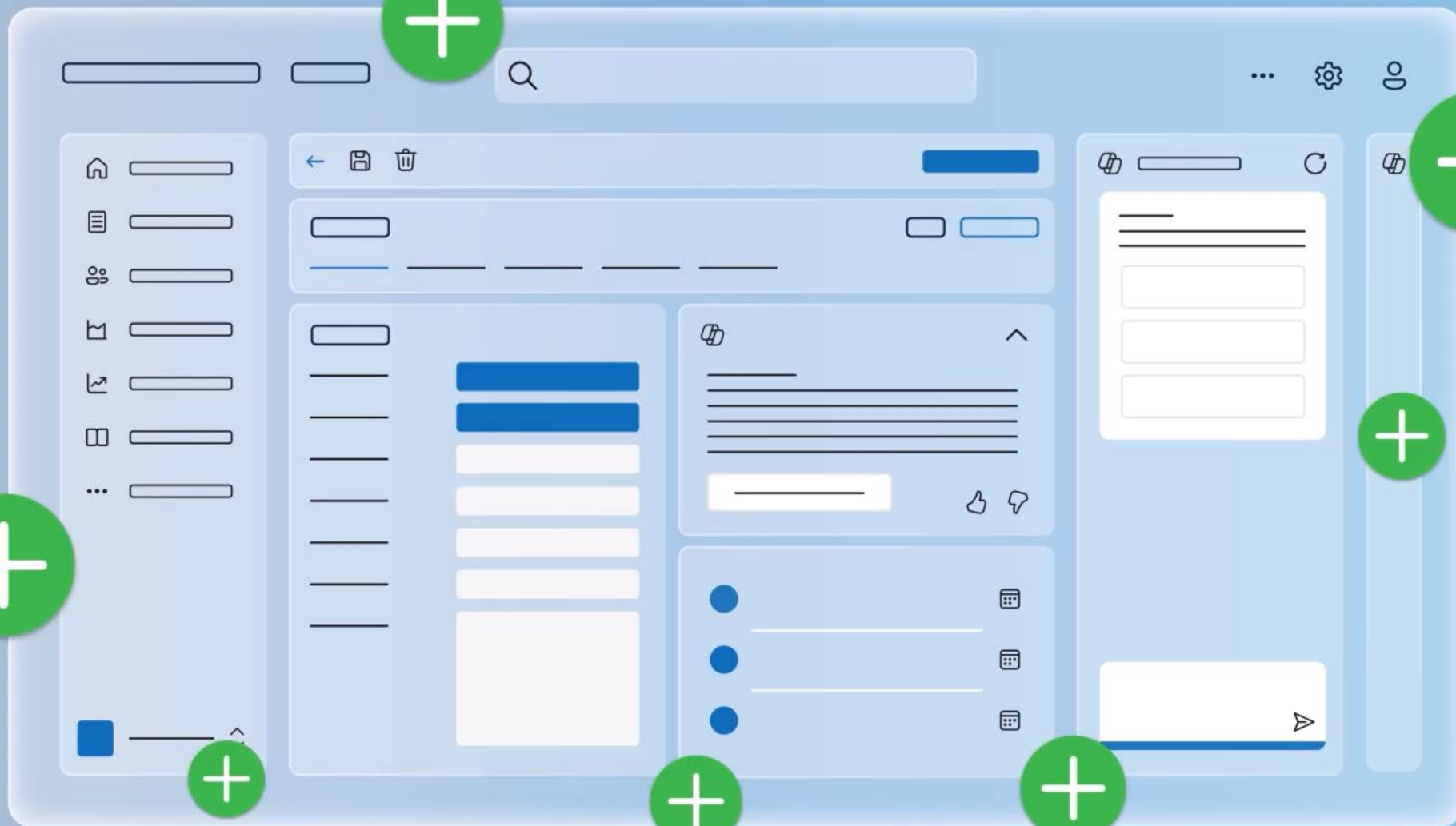
Field Service & Business Central Native Integration

Coming soon

Unifying Field Work and Project Financials

End-to-end alignment of costs, usage, and inventory from Field Service into Project Operations and ERP.





Coming soon

Plan with Project Ops. Execute with Field Service

Work Orders stay in sync with project milestones, so dates and delivery stay aligned across teams.



Projects task to Work Orders



Coming soon

Configurable Maintenance That Fits Your Operations

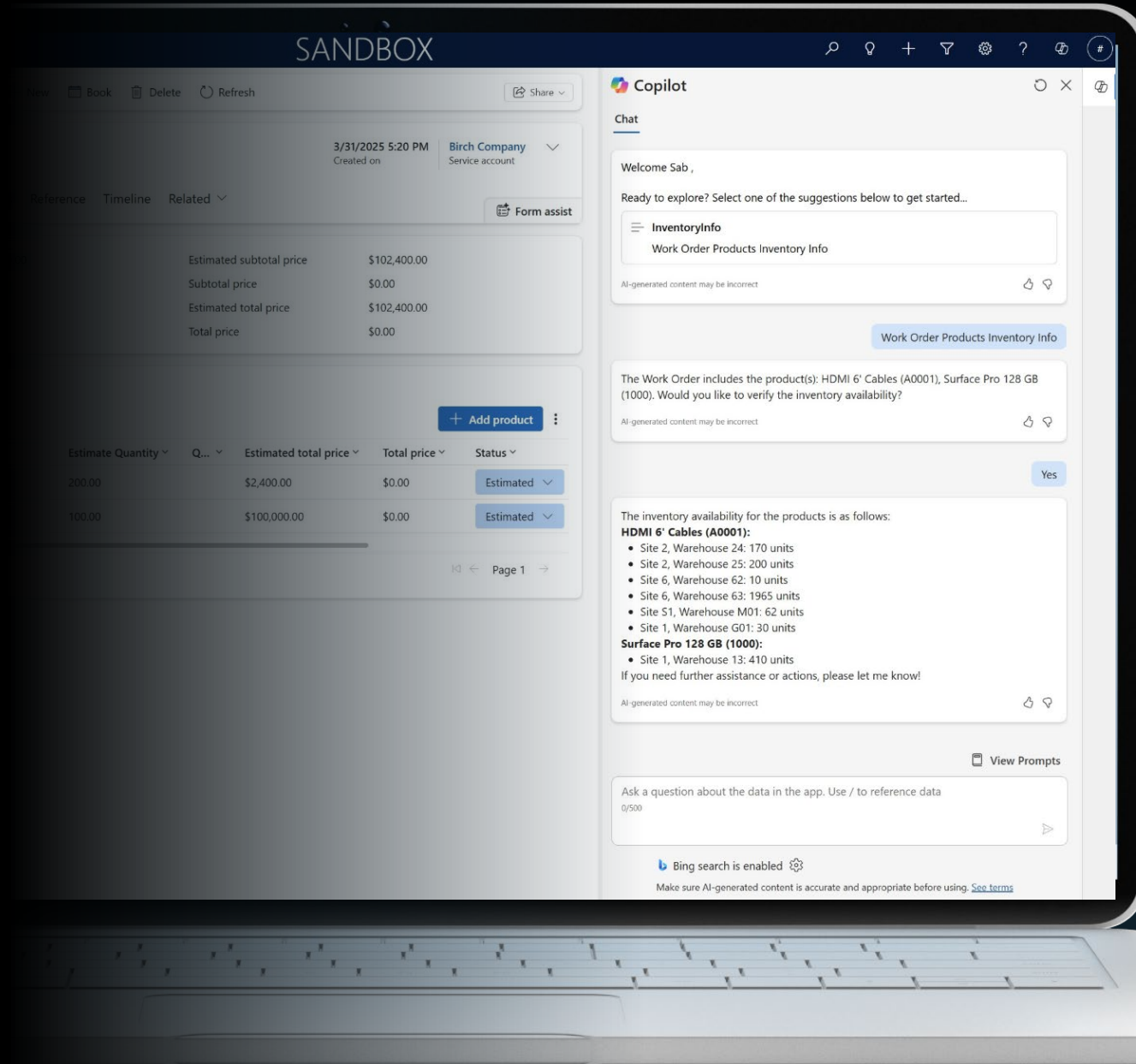
Maintain and manage complex assets with confidence—supporting usage-based, location-aware, and service-driven maintenance on a single platform.



Available now

Extend Copilot Sidecar with Your Own Knowledge

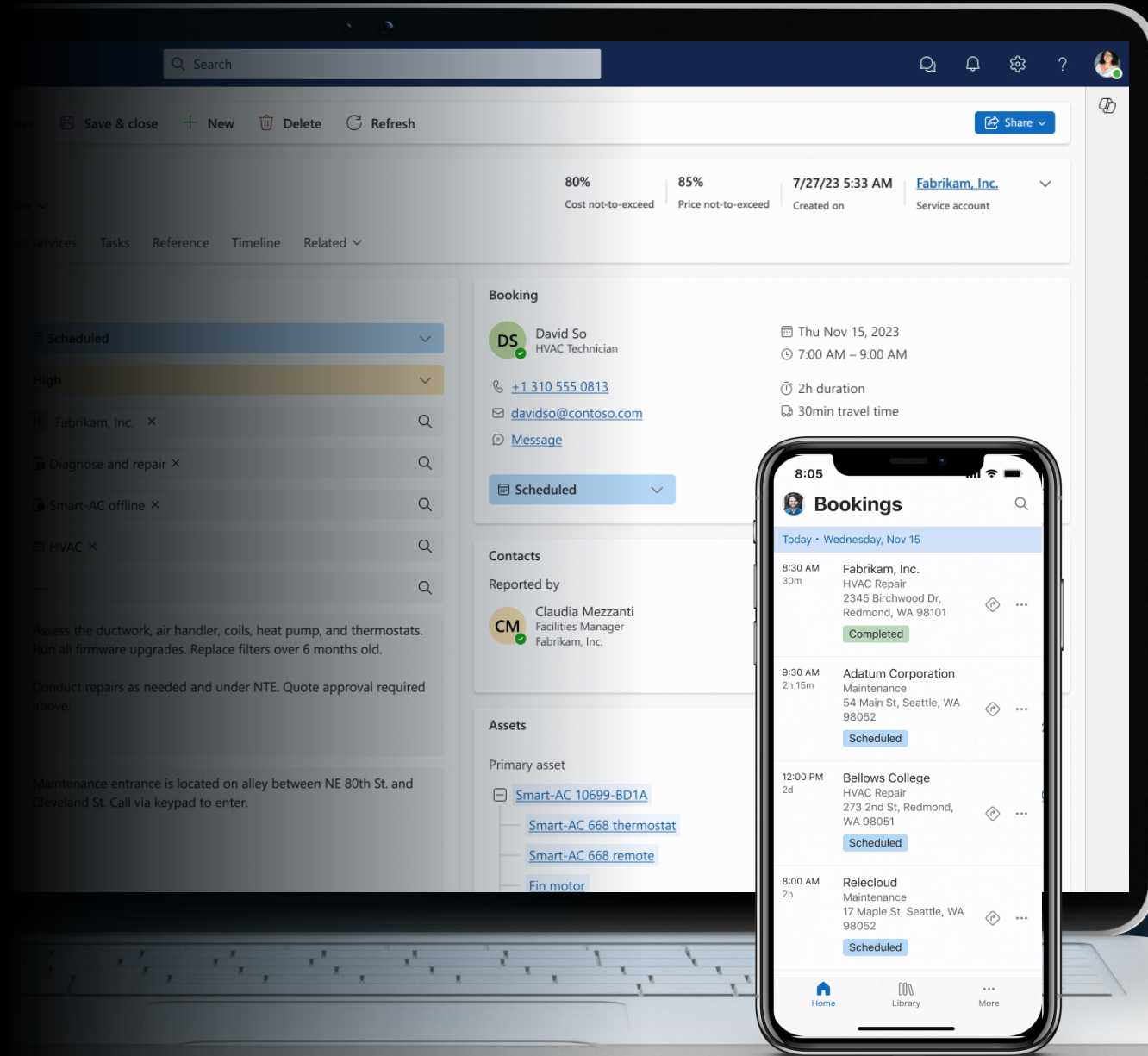
Customize Sidecar responses with your organization's knowledge, workflows, and ERP data using Copilot Studio.



Available now

Customize Copilot work order summaries

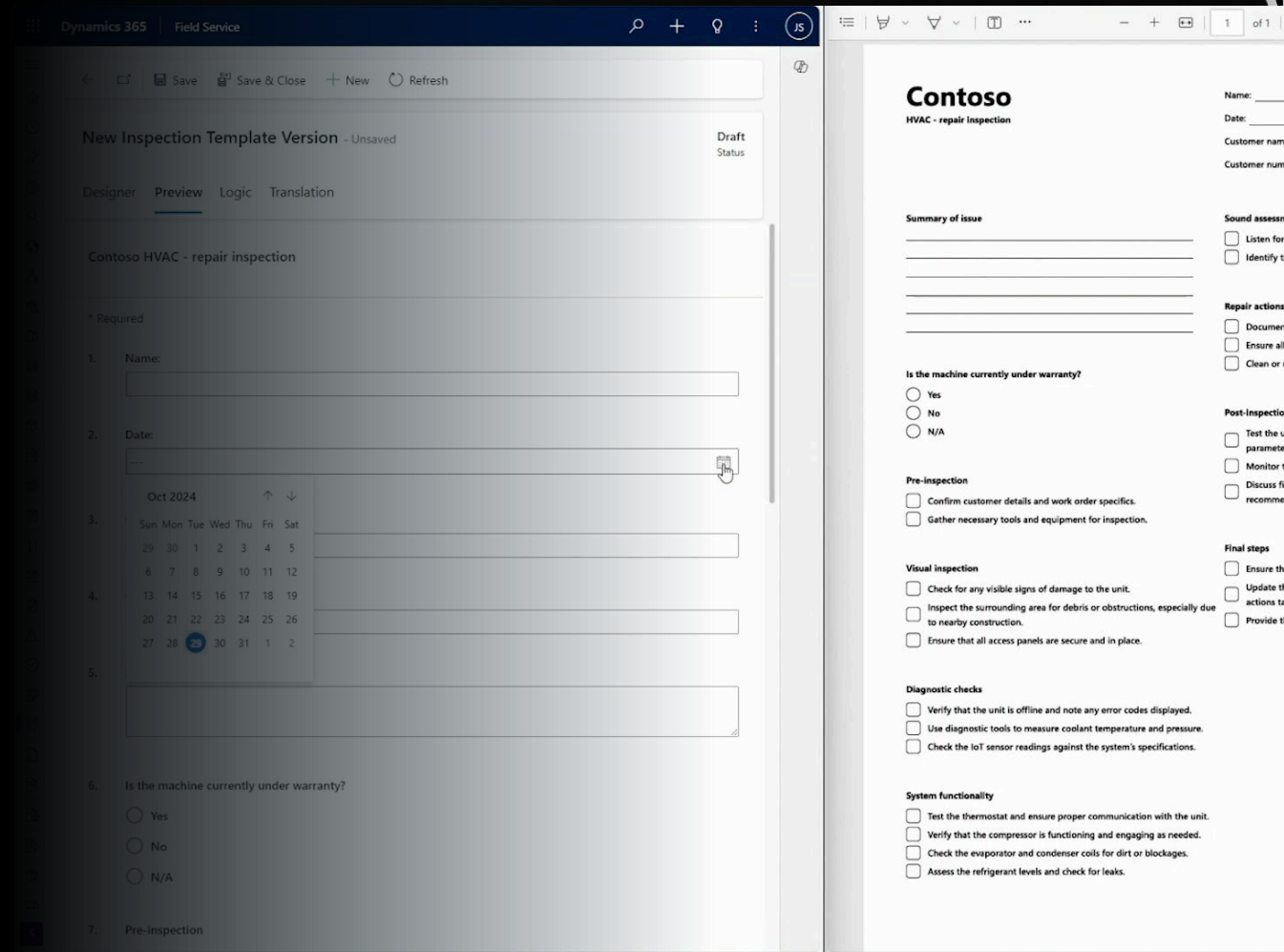
Tailor summaries to highlight what matters most — and filter out the noise.



Available now

Digitize your workforce in minutes, not weeks

Let Copilot help convert PDFs or images into a reusable, interactive inspection templates.



The screenshot displays the Dynamics 365 Field Service interface for creating a new inspection template. The main window is titled 'New Inspection Template Version - Unsaved' with a 'Draft Status' indicator. The interface includes tabs for 'Designer', 'Preview', 'Logic', and 'Translation'. The 'Preview' tab is active, showing a form for 'Contoso HVAC - repair inspection'. The form contains several sections:

- Required fields:**
 - 1. Name: (text input)
 - 2. Date: (calendar picker showing Oct 2024)
 - 3. (text input)
 - 4. (text input)
 - 5. (text input)
- Is the machine currently under warranty?**
 - ☐ Yes
 - ☐ No
 - ☐ N/A
- Pre-inspection**
 - ☐ Confirm customer details and work order specifics.
 - ☐ Gather necessary tools and equipment for inspection.
- Visual inspection**
 - ☐ Check for any visible signs of damage to the unit.
 - ☐ Inspect the surrounding area for debris or obstructions, especially due to nearby construction.
 - ☐ Ensure that all access panels are secure and in place.
- Diagnostic checks**
 - ☐ Verify that the unit is offline and note any error codes displayed.
 - ☐ Use diagnostic tools to measure coolant temperature and pressure.
 - ☐ Check the IoT sensor readings against the system's specifications.
- System functionality**
 - ☐ Test the thermostat and ensure proper communication with the unit.
 - ☐ Verify that the compressor is functioning and engaging as needed.
 - ☐ Check the evaporator and condenser coils for dirt or blockages.
 - ☐ Assess the refrigerant levels and check for leaks.

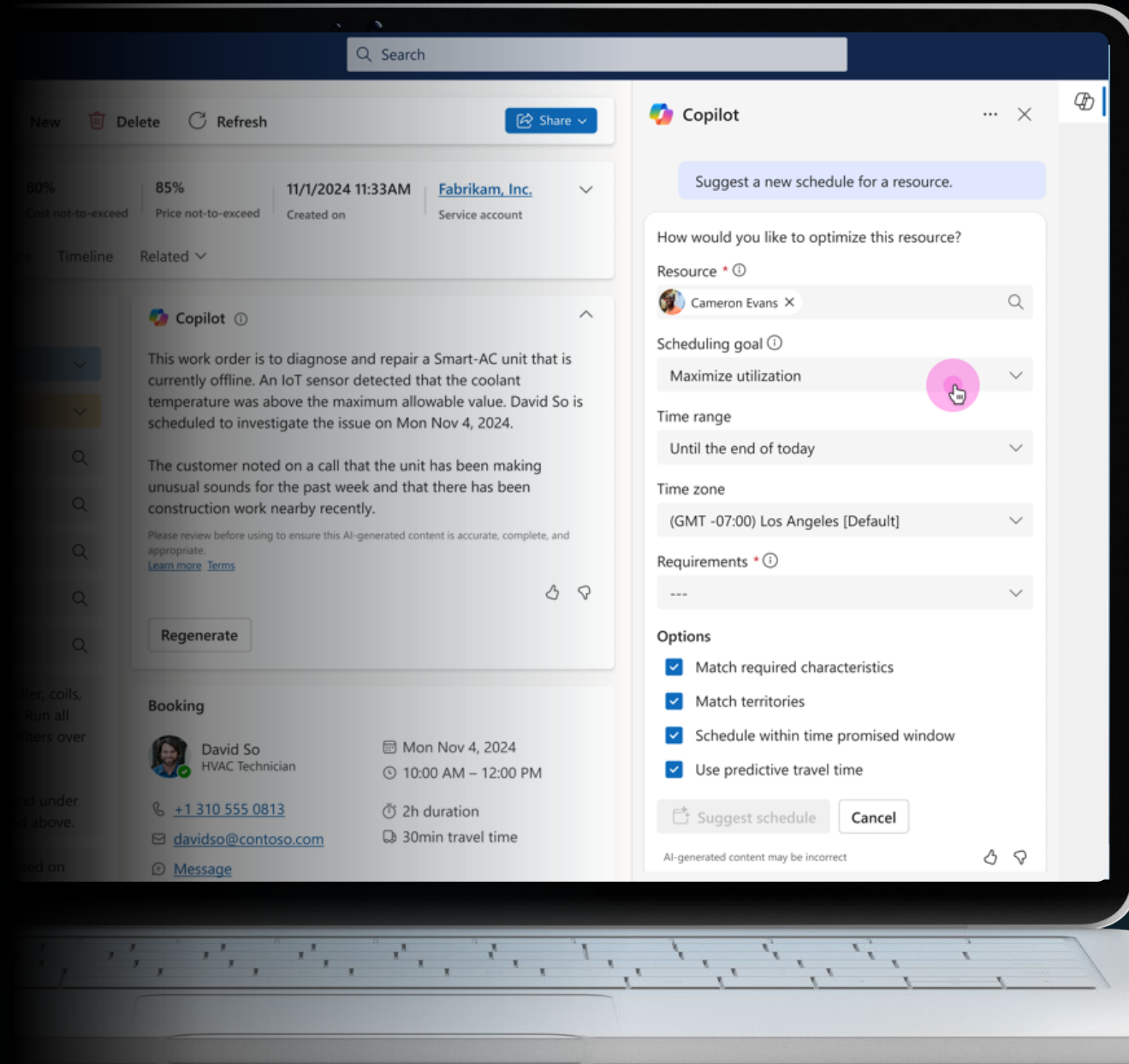
On the right side, there is a sidebar with additional sections:

- Summary of issue**: (text input)
- Sound assessment**
 - ☐ Listen for
 - ☐ Identify
- Repair actions**
 - ☐ Document
 - ☐ Ensure all
 - ☐ Clean or
- Post-Inspection**
 - ☐ Test the u
 - ☐ paramete
 - ☐ Monitor
 - ☐ Discuss f
 - ☐ recomme
- Final steps**
 - ☐ Ensure th
 - ☐ Update th
 - ☐ actions ta
 - ☐ Provide t

Available now

Adapt schedules in real-time with the Scheduling Operations Agent

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



Search

Book

Delete

Refresh

Share

3 days

Contoso Ltd.

Active for

Service account

Timeline

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
Inventory	1	1	\$150.00	\$180.00	Used
	1		\$50.00	\$55.50	Estimated
Inventory	1	2	\$175.00	\$190.00	Used
	2	2	\$150.00	\$180.00	Used
Inventory	1		\$15.00	\$18.00	Estimated
	4		\$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

X

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

Customer Momentum

From vision to value — how customers are **transforming** with us.

hen its enterprise automation lead

Forbes

The Rise Of AI Agents: Unlocking Their Full Potential

ale your AI agents

POLITICO

How AI Is Already Transforming the Media

Introducing Azure AI

Armedia

AI Predictions for 2025: The Rise of Generative AI, AI Agents, and ...

AI-powered ag

we're embracing this new 'agentic ...

tom's guide

Microsoft reveals AI employees at Ignite — agen

n SaaS as We Know It

AP

Microsoft pitches AI 'agents' that can perform tasks on their own at ...

**Dynamics
Communities**

The Rise Of AI Agents: Unlocking Their Full Potential

CX TODAY

AI Agents Will

VentureBeat

Microsoft quietly assembles the largest AI agent ecosystem—and no one else is close

FY26 priorities



Fundamental and stay secure initiative

Continue focus on customer and service health by focusing on security, monitoring & alerting, test automation, and platform standardization



Core Product Evolution

Evolve core product capabilities, usability, and deepen workflows and integration within the Dynamics 365 portfolio



Evolve Field Service with Copilot and Agents

Continue to infuse FS across back office and technicians with Gen-AI and Agents that transform productivity with new capabilities



Scheduling Operations Agent

Provide optimization through a suite of entry points. Including: user-initiated, autonomous with user input, and full autonomous agents

Real Results. Measurable Impact.

Customers using Dynamics 365 Field Service are seeing dramatic ROI — with faster operations, reduced costs, and happier teams.



346%

ROI over 3 years



<6

Month payback



100

hours saved per month

Source: [Forrester study finds 346% ROI when modernizing service operations with Dynamics 365 Field Service](#) - Microsoft Dynamics 365 Blog



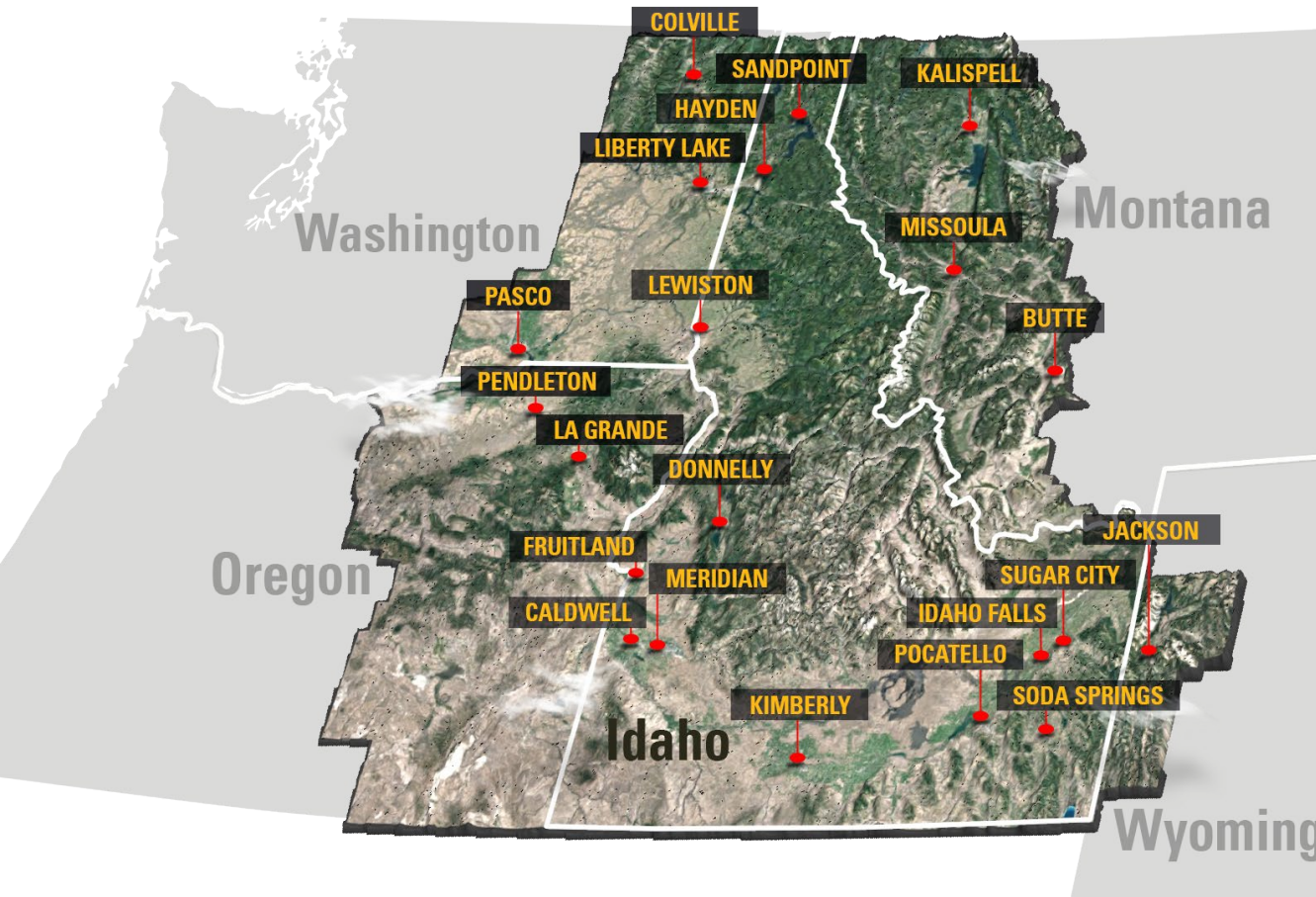
Justin Bailey

CIO, Western States Equipment

WESTERN STATES EQUIPMENT COMPANY



WESTERN STATES TERRITORY



Operates in Eastern Washington, Eastern Oregon, Idaho, Western Wyoming, Western Montana.



Territory footprint of 191,000 square miles (larger than Italy, United Kingdom and 29 other countries).



1200 employees.



22 locations that provide sales, parts, service, rental and technology solutions.



Supporting the construction, mining, forestry, waste, agriculture, power generation, technology and governmental industries since 1956!



“

Dynamics 365 Field Service
helps us deliver faster,
smarter, and more
connected experience for
our employees and
customers.”

Justin Bailey
Chief Information Officer
Western States Equipment

 **WESTERN
STATES**

 **CAT**

Western States



CHALLENGE

- Legacy AX2012 slowed scheduling and limited-service visibility
- Decentralized dispatching created inconsistent processes across shops
- Technicians lacked real-time access to data in the field

SOLUTION

- Dynamics 365 Field Service integrated with AX2012
- Standardized scheduling and dispatching across the organization
- AI-generated service reports to reduce manual effort

OUTCOME

- 20–30% reduction in unbillable time through optimized scheduling
- 40% of employees moved to a modern platform
- Accurate time tracking improves job visibility and scoping

And they're just getting started... 🚀

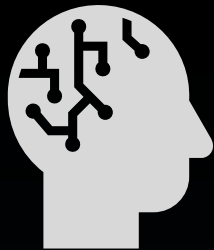


Wrapping it up

Bold innovation, proven value, and a clear path forward.

What sets us apart — today and tomorrow

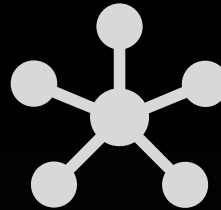
Innovation with AI



Field Service Reimagined with Copilot and Agents

Intelligent, task-specific AI agents streamline scheduling, inspections, time entry, and subcontractor updates — transforming frontline productivity across mobile, Teams, and Outlook.

Unified Product Suite



Connected Operations from Field to Finance

Field updates flow seamlessly into Project Operations and Finance, ensuring accurate costs, clean financials, and a consistent operational truth across the business.

Proven value



Trusted by Industry Leaders with Measurable ROI

Customers like Siemens, Intralox, and Ausgrid are reducing downtime, improving uptime, and realizing **346% ROI** and **100+ hours/month** saved (Forrester TEI).

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>

Want to go deeper?

Join us tomorrow for our session on
Smarter scheduling and faster field work with AI in Dynamics 365 Field Service



Thursday, December 11, 2025



8:45 AM - 9:45 AM



Belle

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QUESTIONS

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THANK YOU

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