

# USER GUIDE



## OSP Manager

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## INTRODUCTION

OSP Manager is a comprehensive solution, based on TM Forum specifications, designed to support customer onboarding and coordination of field service around OSP Assets and Resources. Includes Mapping tools and Composite Place Management to precisely locate Assets, Bookable Resources, Warehouses, Plant Elements, Devices, Demarcation Points, and Premises.

OSP Manager is part of SMP (Service Management Platform) solutions set based on Microsoft Dynamics 365 for Field Service. PLEASE NOTE: it is important to have Microsoft Dynamics 365 for Field Service v. installed in your system before using this product.

## GLOSSARY

**Serviceability Check** – Enhanced lead qualification process. Service check helps to gather initial information, utilize HERE Autocomplete API to find Geographic Address and cross-reference with visual map to ensure Service coverage.

**Service Order** – Enhanced Opportunity-to-Order process. Step-by-step flow, helping prepare Work Orders, Products and monitor Fulfillment.

**Map Layers** – Mapping tool allows to visualize different primitives (points, polylines and polygons) on the map and combine them into independent layers.

**Place** – TM Forum Place model. Composite entity consisting of Geographic Place and Local Place. By default, represents Service Location, where the actual provisioning will be delivered to.

**Geographic Place** – Can be associated with either Geographic Address or Geographic Location. Based on what is present, it automatically picks either one. Also used as root entity to store Local Places associated with this Geographic Place

**Geographic Address** – Postal Address.

**Geographic Location** – TM Forum part of the model, can be a simple point or complex geospatial object (area, polyline, etc.). It is defined by either a set of Geographic Points associated with it or by compressed coordinates stored in Encoded Points attribute.

**Local Place** – Detailed information about the Geographic Place. Default types are Premise, Demarc, CPE, Head End, Drop, Other.

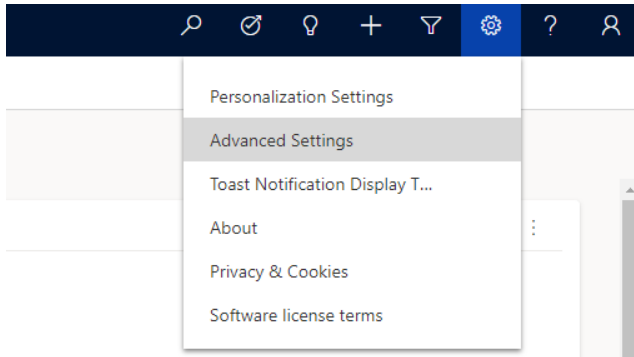
**Local Address** – Additional navigation within Local Place.

**Local Location** – Sub-level detail, helping to find exact location within specified Local Address.

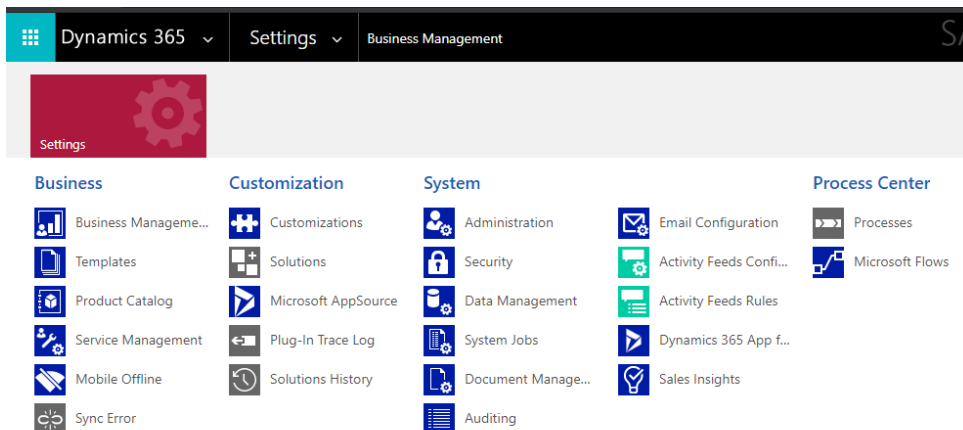
## INSTALLATION

For successful operation of the solution it requires Microsoft Dynamics 365 for Field Service installed in the target system, as well as **ETI\_SMP\_Full\_Core solution**, which is a base for the OSP Manager.

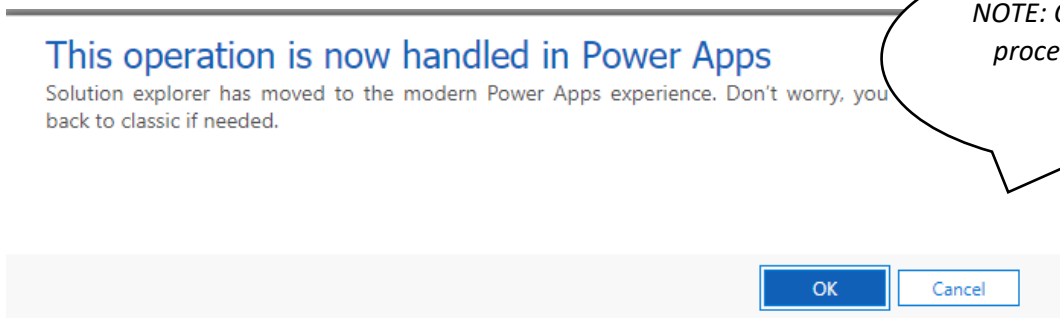
To install navigate to target instance, then click on Gear icon in the top right corner and select Advanced Settings:



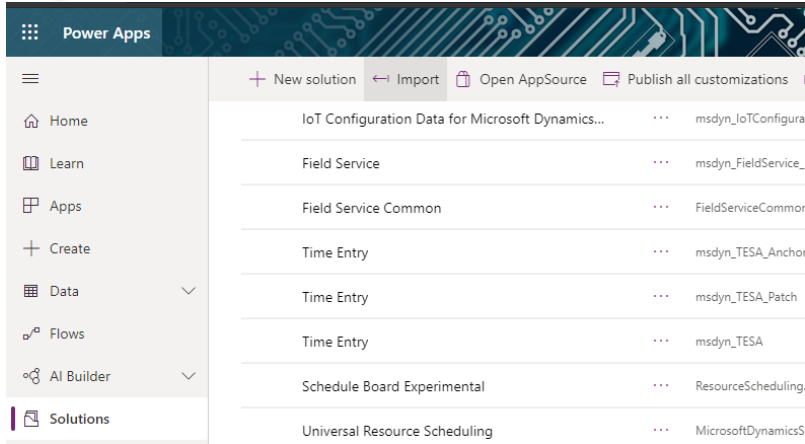
In the new tab, click on drop-down icon for Settings and navigate to Solutions:



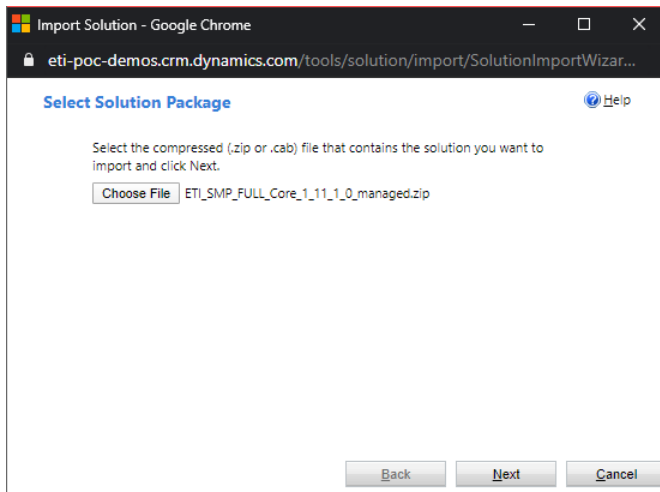
A prompt to navigate to Power Apps Solution explorer will pop-up.



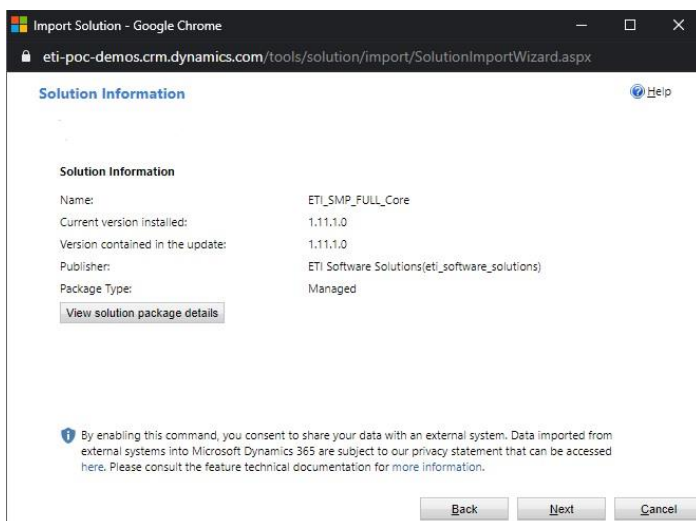
Click OK to redirect to PowerApps. In the new tab, select Import to start installation process:



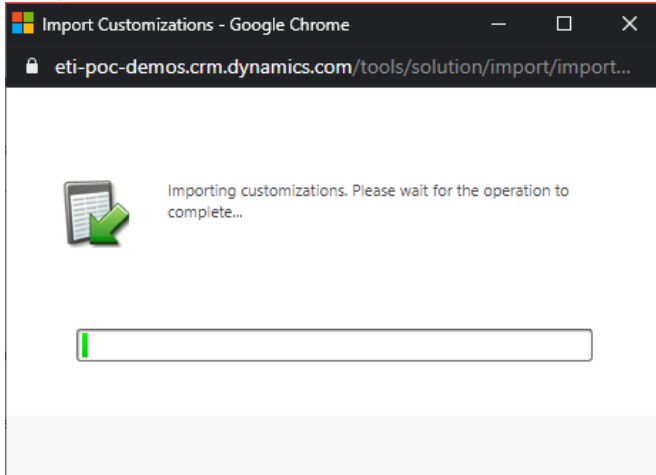
Select **ETI\_SMP\_FULL\_Core** (latest version) to be installed first.



Click Next.



Click Next. The Solution will start to install.

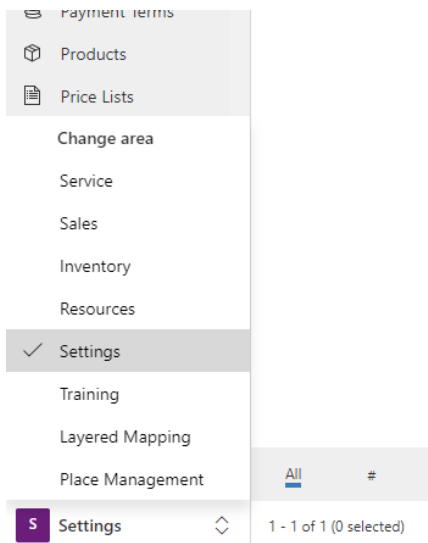


After successful installation proceed with exact same process for OSP Manager Solution.

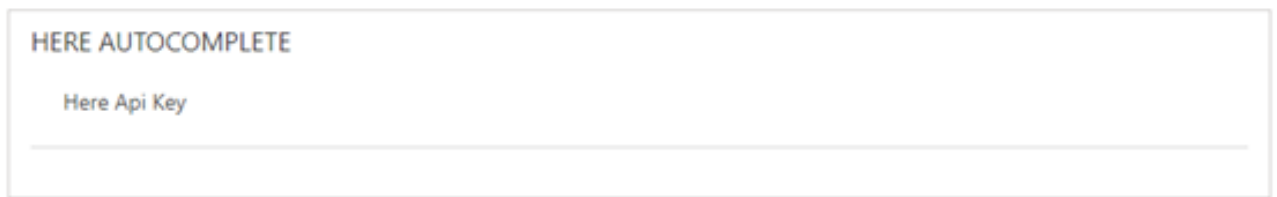
## CONFIGURATION

### Activate HERE Api key

To activate HERE API key, navigate to Settings in the bottom left corner of the screen and select Settings



Click on “Field Service” settings and in the new window go to OSP Manager Tab:



The screenshot shows a window titled 'HERE AUTOCOMPLETE'. Inside the window, there is a label 'Here Api Key' followed by a text input field. The input field is currently empty.

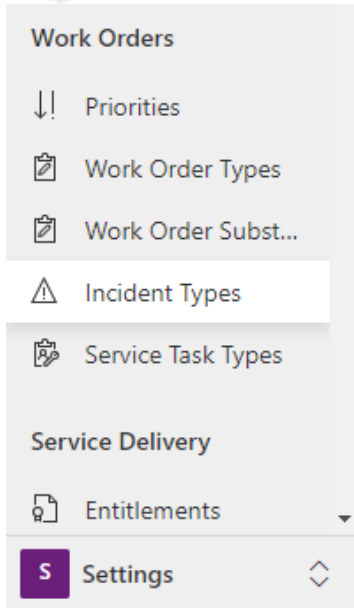
Insert HERE Api Key to engage address autocomplete functionality.

### Configure Work Order types and Incidents

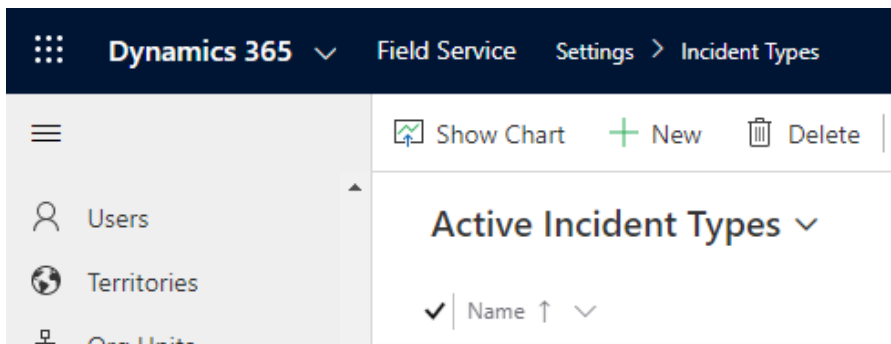
To make sure your Service Order process works as designed, please create Incident Types and Work Order.

To create Incident Types, navigate to Settings Tab and Click on Incident Types:

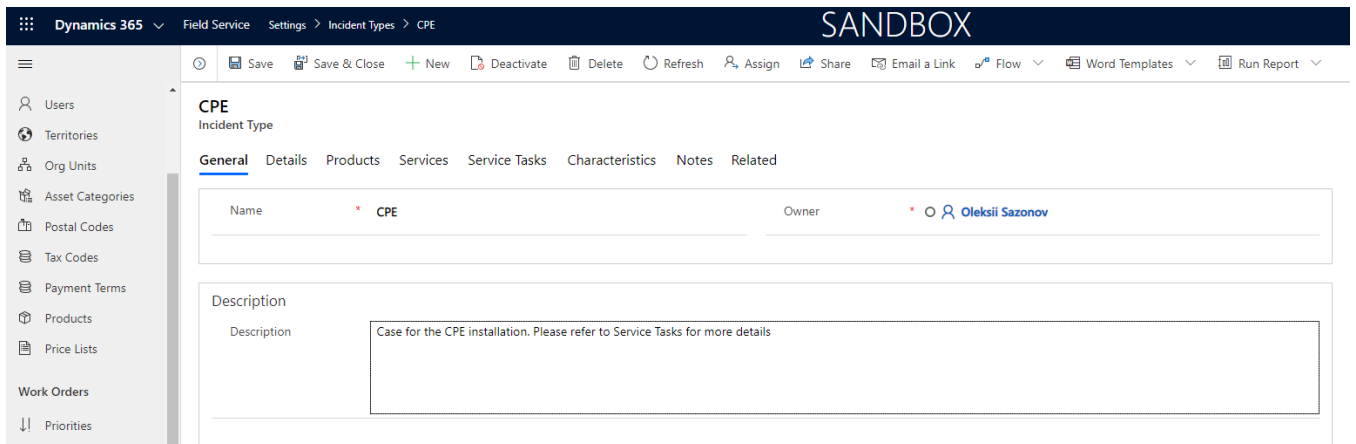




Click "+ New" in the top Ribbon:



Fill in required information:



**Dynamics 365** | Field Service | Settings | Incident Types | CPE

**SANDBOX**

Save Save & Close + New Deactivate Delete Refresh Assign Share Email a Link Flow Word Templates Run Report

**CPE**  
Incident Type

General **Details** Products Services Service Tasks Characteristics Notes Related

Incident Details

Default Work Order Type [Installation Work Order](#) Copy Incident Items to Agreement **No**

Estimated Duration **1 hour** Last Calculated Time ---

**Dynamics 365** | Field Service | Settings | Incident Types | CPE

**SANDBOX**

Save Save & Close + New Deactivate Delete Refresh Assign Share Email a Link Flow Word Templates Run Report

**CPE**  
Incident Type

General Details Products Services **Service Tasks** Characteristics Notes Related

Task Type	Incident Type	Description	Estimated Duration	Created On	Line Order
Installation services	CPE	CPE Install	30 minutes	5/6/2020 12:10 AM	1
Installation services	CPE	Configure CPE	30 minutes	5/6/2020 12:11 AM	2

Save changes by clicking on Save button.

**PLEASE NOTE:**

*Default Incident Types have no Details, Products and Service Tasks.*

To assign created / default Incident Types navigate to Setting tab and select Field Service Settings. Open active record and navigate to OSP Manager tab.

Fill in provided fields to ensure expected behavior of Service Order process.

**Dynamics 365** | Field Service | Settings | Field Service Settings | Field Service

**SANDBOX**

Save Save & Close + New Deactivate Delete Refresh Opt-In to Auto-Num... Assign Share Email a Link Flow Word Templates Run Report

**Field Service**  
Field Service Setting

Work Order / Booking RMA RTV Agreement Purchase Inventory **OSP Manager** Intelligence Field Service SLA Configuration Time Entry Remote Assist Other Notes Rel

WORK ORDER SETTINGS

Install Work Order Type [Installation Work Order](#)

Fiber / Circuit Assigned (Aerial) [Fiber \(Aerial\)](#)

Fiber / Circuit Assigned (Burial) [Fiber \(Burial\)](#)

Drop Present (Aerial) [Drop \(Aerial\)](#)

Drop Present (Burial) [Drop \(Burial\)](#)

Demarc Built [Demarc](#)

CPE Installed [CPE](#)

Device Assigned [Device](#)

HERE AUTOCOMPLETE

Here Api Key

**PLEASE NOTE:**

*Labels and Custom processes are subject of customization. For more info please [contact us](#).*

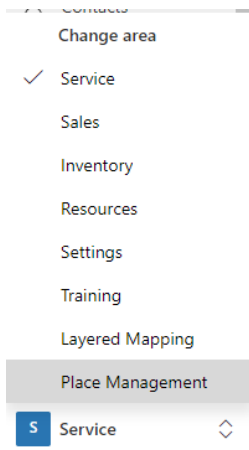
## Configure and Set-up Places

Place is a composite entity representing combination of Geographic Place and Local Place. Geographic Place is a Physical point on the map where Premise/Asset/Device may be and Local Place is a combination of details about how to find exactly what you are looking for. To set up Place it is recommended to start with Geographic Address.

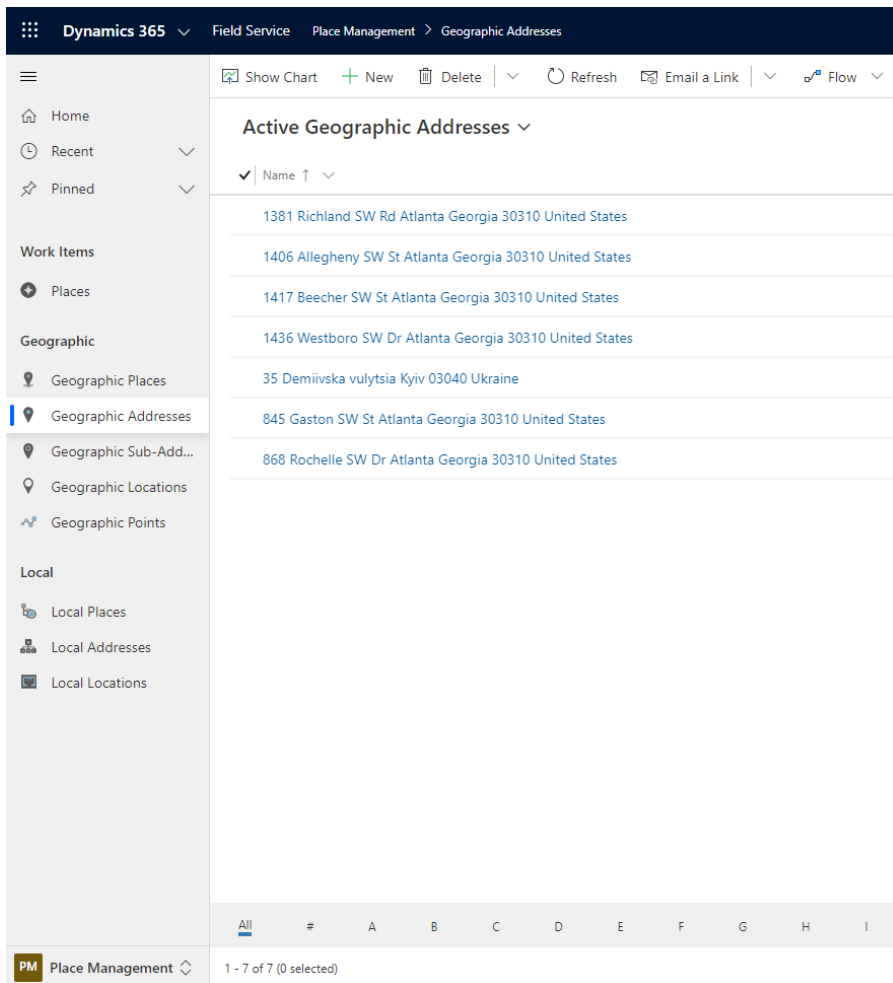
**PLEASE NOTE:**  
*Most likely the creation of Place will be initiated via Service Order or via bulk import.*

## Create Geographic Address

Navigate to Place Management tab:



Click on Geographic Address in the menu on the left:



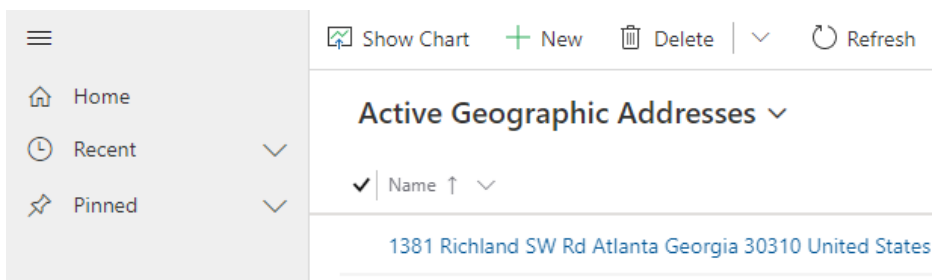
**Dynamics 365** > Field Service > Place Management > Geographic Addresses

Active Geographic Addresses

Name	#	A	B	C	D	E	F	G	H	I
1381 Richland SW Rd Atlanta Georgia 30310 United States										
1406 Allegheny SW St Atlanta Georgia 30310 United States										
1417 Beecher SW St Atlanta Georgia 30310 United States										
1436 Westboro SW Dr Atlanta Georgia 30310 United States										
35 Demiivska vulytsia Kyiv 03040 Ukraine										
845 Gaston SW St Atlanta Georgia 30310 United States										
868 Rochelle SW Dr Atlanta Georgia 30310 United States										

1 - 7 of 7 (0 selected)

Click "+ New" to create new Geographic Address:



**Dynamics 365** > Field Service > Place Management > Geographic Addresses

Active Geographic Addresses

Name	#	A	B	C	D	E	F	G	H	I
1381 Richland SW Rd Atlanta Georgia 30310 United States										

Type in Address in Search bar (Address Details)

Dynamics 365

Field Service

Home

Recent

Pinned

Work Items

Places

Geographic

Geographic Places

Geographic Addresses

Geographic Sub-Add...

Geographic Locations

Geographic Points

Local

Local Places

Local Addresses

Local Locations

Save

Save & Close

New

Flow

## New Geographic Address

General

Geographic Sub-Addresses

ESSENTIAL

Type	Formatted Address	Geographic Location	---
------	-------------------	---------------------	-----

ADDRESS DETAILS

Start typing address

Street Number	---	City	---
Street Name	---	State Or Province	---
Street Type	---	Country	---
		Postcode	---

LOCATION

Latitude	---	Longitude	---
----------	-----	-----------	-----

**Dynamics 365** > Field Service > Place Management > Geographic Addresses > 766 Cascade SW PI Atlanta Georgia 30310 United States

## SANDBOX

Save Save & Close New Deactivate Delete Refresh Assign Share Email a Link Flow Word Templates Run Report

### 766 Cascade SW PI Atlanta Georgia 30310 United States

Geographic Address

**General** Geographic Sub-Addresses Related

#### ESSENTIAL

Type	* Formatted Address	Geographic Location	---
------	---------------------	---------------------	-----

#### ADDRESS DETAILS

**766 Cascade PI SW, Atlanta, GA 30310, United States**

Street Number	* 766	City	Atlanta
Street Name	Cascade SW	State Or Province	Georgia
Street Type	* PI	Country	United States
		Postcode	* 30310

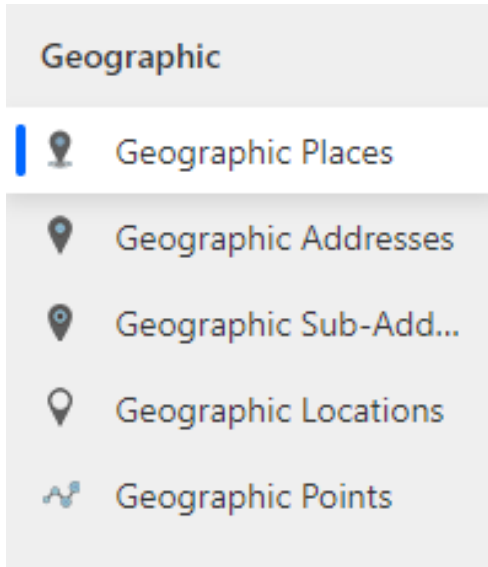
#### LOCATION

Latitude	33.73437	Longitude	-84.43498
----------	----------	-----------	-----------

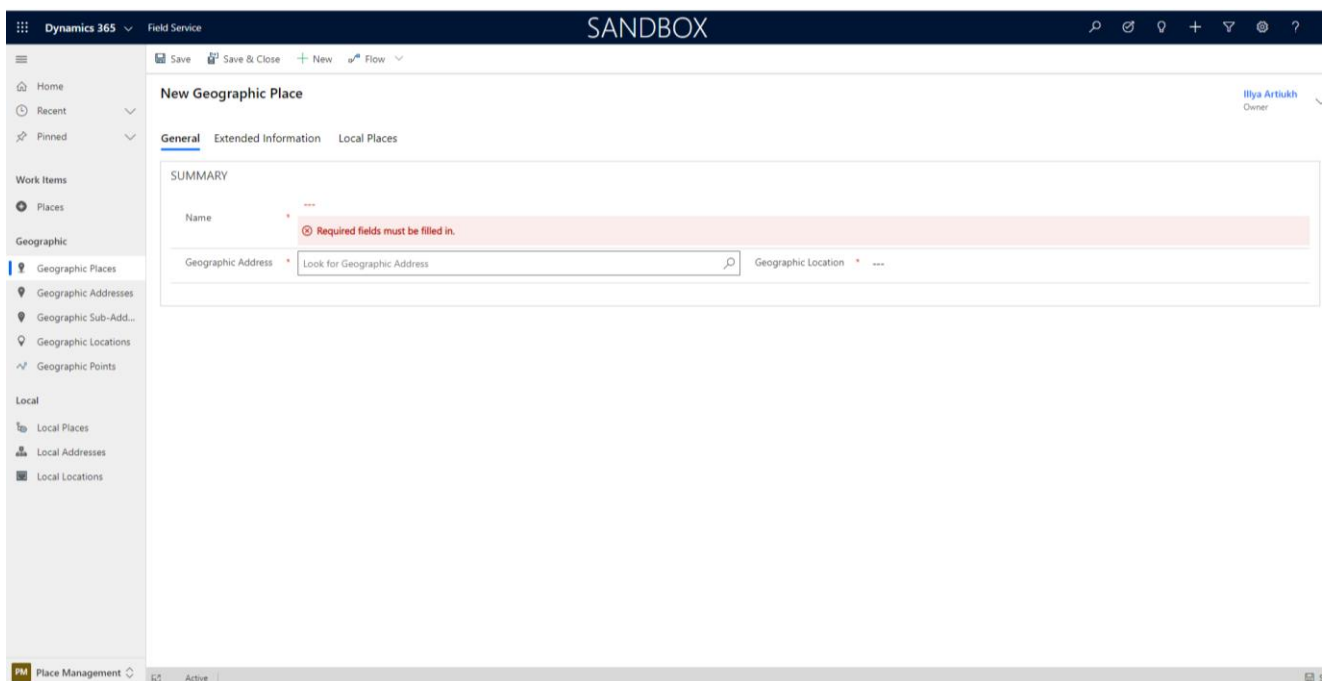
Save and Close record by clicking "Save & Close" in the top ribbon.

## Create Geographic Place

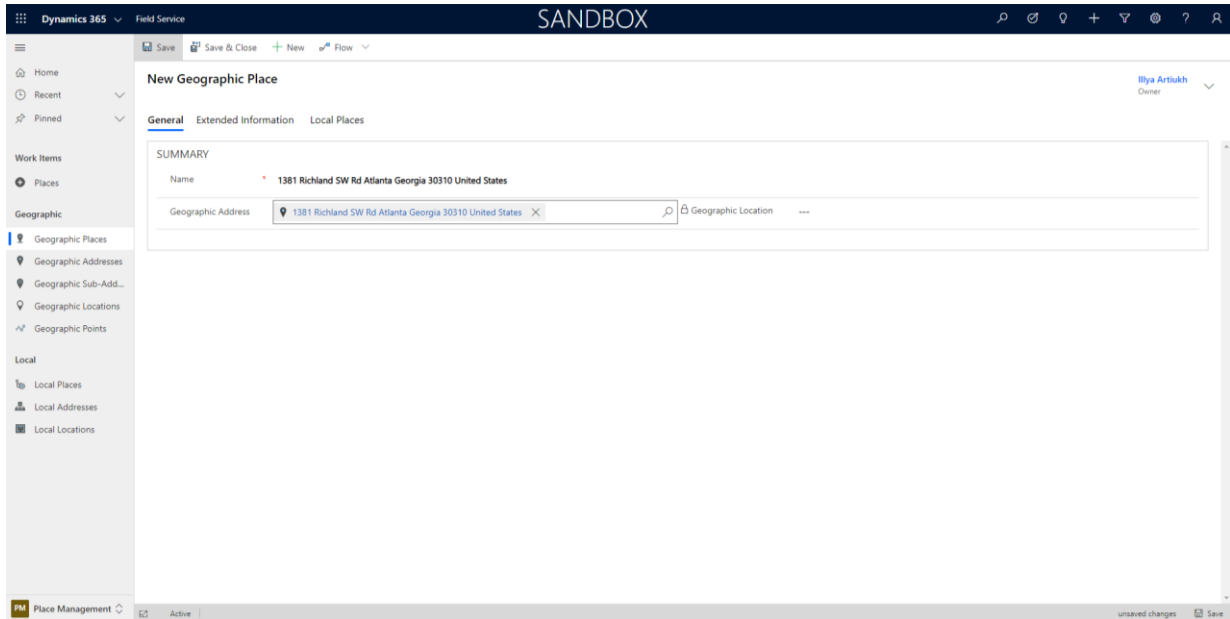
Click on Geographic Places in the menu on the left:



Click "+ New" to create new Geographic Place:

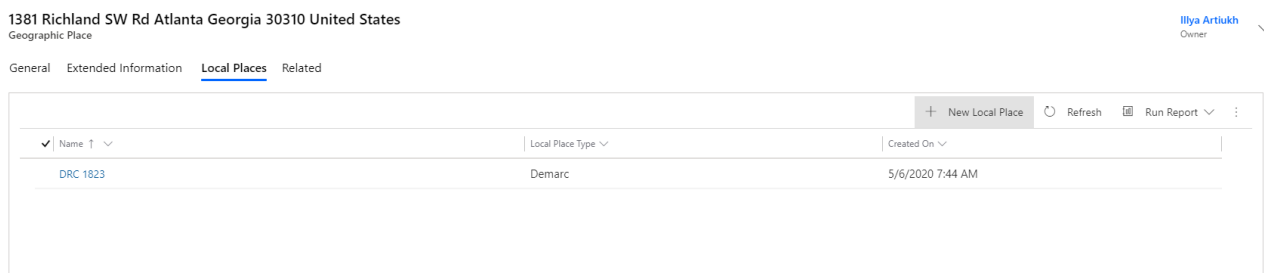


To create new Geographic Place simply select Geographic Address by clicking on Search icon and selecting desired Geographic Address. The name of the Geographic Place will be automatically set to Geographic Address. In case there is no Geographic Address, Geographic Place will use Geographic Location instead. Click Save in the top Ribbon to save the changes.



## Link Local Place to Geographic Place

To create Local Place and associate it with Geographic Place, go to Local Places tab in Geographic Place record and click “+ New Local Place” in the top ribbon of the Grid.



Name	Local Place Type	Created On
DRC 1823	Demarc	5/6/2020 7:44 AM

Fill in required information in the Quick Create Section and click “Save and Close”:

Quick Create: Local Place

Local Place Type \* Premise

Name \* Detached House

Demarc \* 

DRC 1823

Geographic Place \* 

1381 Richland SW Rd Atlanta Georgi...

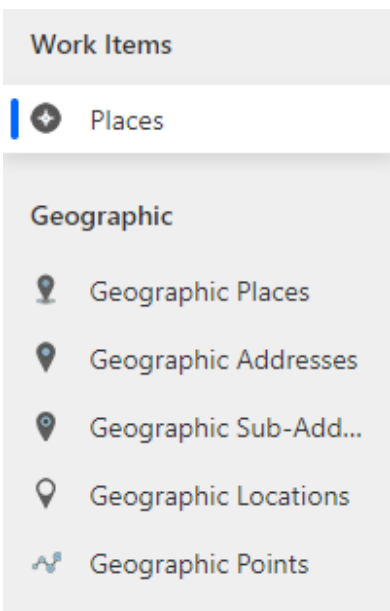
Save and Close

Cancel

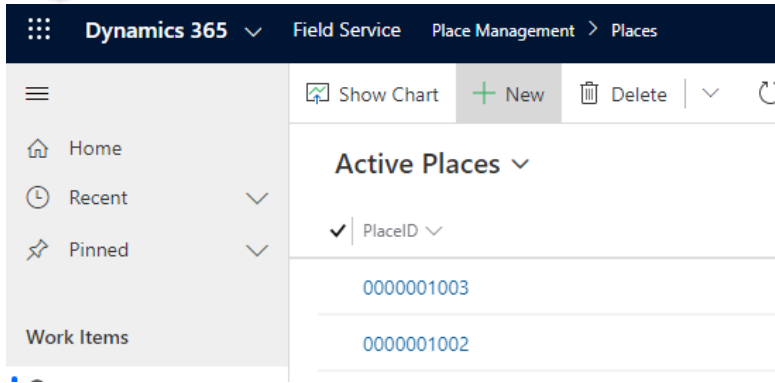
*PLEASE NOTE: To be able to create Local Place of type Premise, you must have Local Place of type Demarc created.*

## Create Place

To create Place, click on Places in the menu on the left and click "+ New" in the top ribbon.







To create Place, simply select Geographic Place in the Summary Tab:

**New Place** Place Id Owner Illya Artiukh

**General**

Override Name ☐ No

**SUMMARY**

Geographic Place 1381 Richland SW Rd Atlanta Georgia 30310 United States

Local Place ---

Geographic Address 1381 Richland SW Rd Atlanta Georgia 30310 United States

Geographic Location ---

**Local Place**

Name	Local Place Type	Created On
Detached House	Premise	5/6/2020 7:52 AM
DRC 1823	Demarc	5/6/2020 7:44 AM

All information that exists and related to that Geographic Place will be automatically filled. Slick "Save" to save changes. Your Place is now created with unique ID. You can Override Name by toggling "Override Name" field to "Yes" and typing your own name.

Save Save & Close New Deactivate Delete Refresh Assign Share Email a Link Flow Word Templates

**0000001004**  
Place

**General** **Related**

Override Name ☐ No

**SUMMARY**

Geographic Place 1381 Richland SW Rd Atlanta Georgia 30310 United States

Local Place ---

Geographic Address 1381 Richland SW Rd Atlanta Georgia 30310 United States

Geographic Location ---

**Local Place**

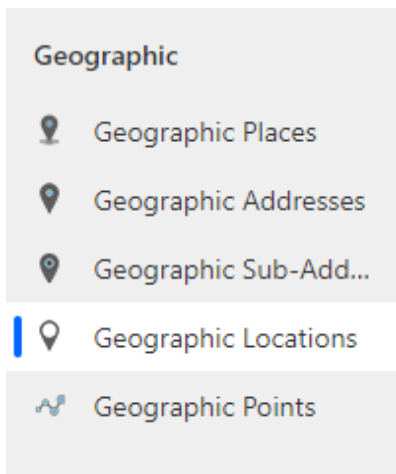
Name
Detached House
DRC 1823

## Configure Service Areas

Service Area consists of several configurations that have to be made before using it: Geographic Location, Technology, Network Zone and Service Areas. Each of those configurations are mandatory to ensure successful operations within OSP manager.

### Create Geographic Location

Navigate to Place Management tab in the bottom left corner and select Geographic Locations. Then Click "+ New" to add new Geographic Location.



Fill in the Name and Geometry Type. Geometry types consist of Polygon, Point, Line, Graph and Ring. To display an Area – please select Polygon. You can build Geographic location using Geographic Points in the grid, or fill in Encoded Points field. Encoded Points represent set of Geographic Points by Bing! Maps.

Service Area - Atlanta - Copper  
Geographic Location

Ilya Artiukh Owner

General Details Related

Name	Service Area - Atlanta - Copper	EncodedPoints	mhp2520g_H-i-8_9gvEjmf1tmF
Geometry Type	Polygon	Metadata	---
Accuracy	---		
Spatial Ref	---		

+ New Geographic Point Add Existing Geograp... Refresh


✓ Name Point Number T

No data available.

**PLEASE NOTE:** ETI Software recommends using [Bing! Dev Center](#) to create EncodedPoints. To know how to get Encoded Points from Bing! Dev Center, please contact us.

Quick Create: Geographic Point

×

Latitude	*	---
Longitude	*	---
Elevation		---
Geographic Location		<b>Service Area - Atlanta - Copper</b>
Point Number	*	1

Save and Close

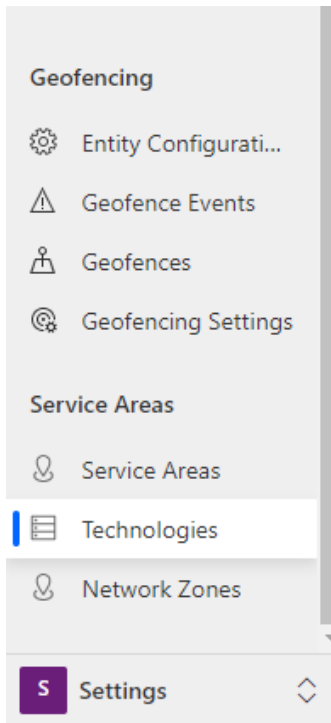
▼

Cancel

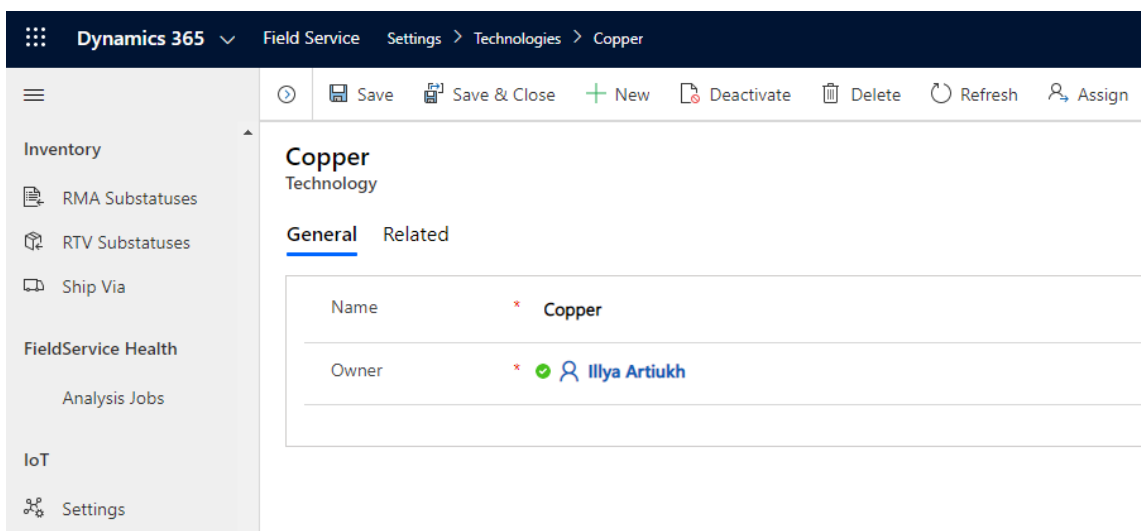
*If you are already using Encoded Points, they will be recalculated automatically to fit new Geographic Point. This will result in change of the shape of the Area.*

Save & Close, to save the changes.

Next step is to set up Technologies and Network Zones. Network Zone is an identifier for the area to be provisioned by specific NoC (Network Operating Center). Technologies represent the type of technology services will be provided by to the end Subscriber. To create Technologies, navigate to Settings in the bottom left corner and click on Technologies:



Click "+ New" in the top ribbon to create new Technology. Fill the name and click "Save and Close" to save changes and create the record.




**Dynamics 365** | Field Service | Settings > Technologies > Copper

Save | Save & Close | + New | Deactivate | Delete | Refresh | Assign

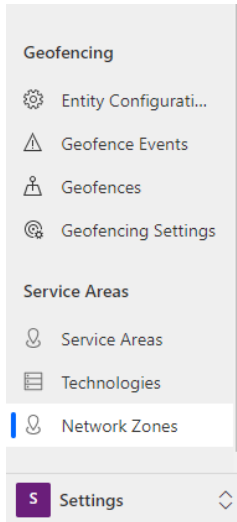
### Copper

Technology

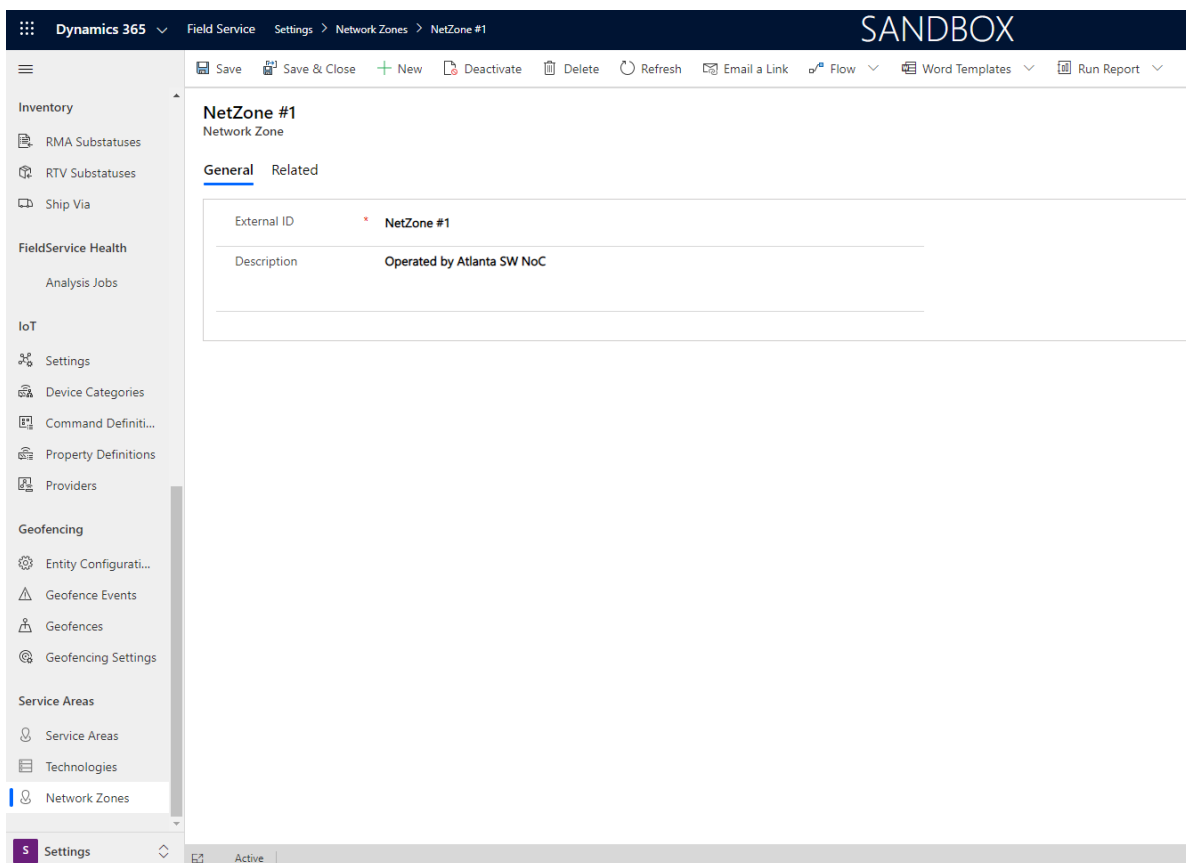
**General** | Related

Name	* Copper
Owner	*  Ilyia Artiukh

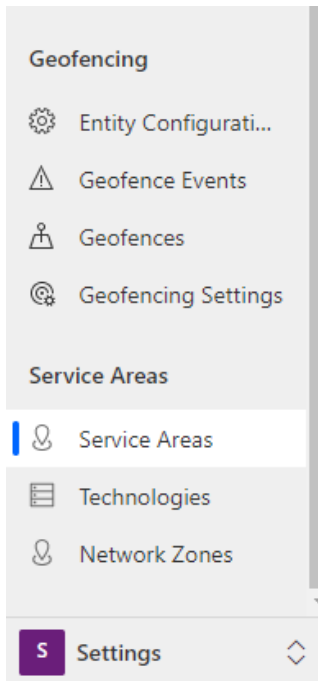
To create Network Zones, navigate to Network Zones in the left menu, then click “+ New” to create new one.



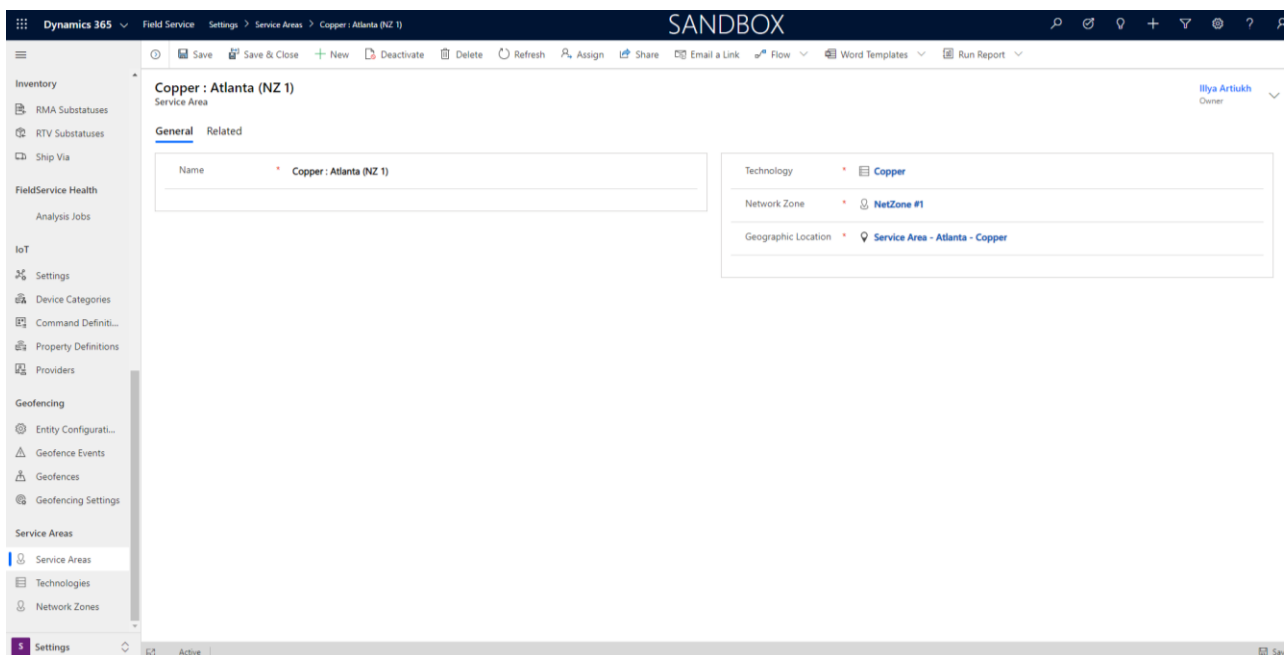
Fill in the name and click “Save and Close” to create record.



We can now create Service Area. To do so, navigate to Service Areas in the left menu:



Click "+New" to create new record and fill in all the fields in the form:



**Copper : Atlanta (NZ 1)**  
Service Area

**General** | Related

Name	Copper : Atlanta (NZ 1)
Technology	Copper
Network Zone	NetZone #1
Geographic Location	Service Area - Atlanta - Copper

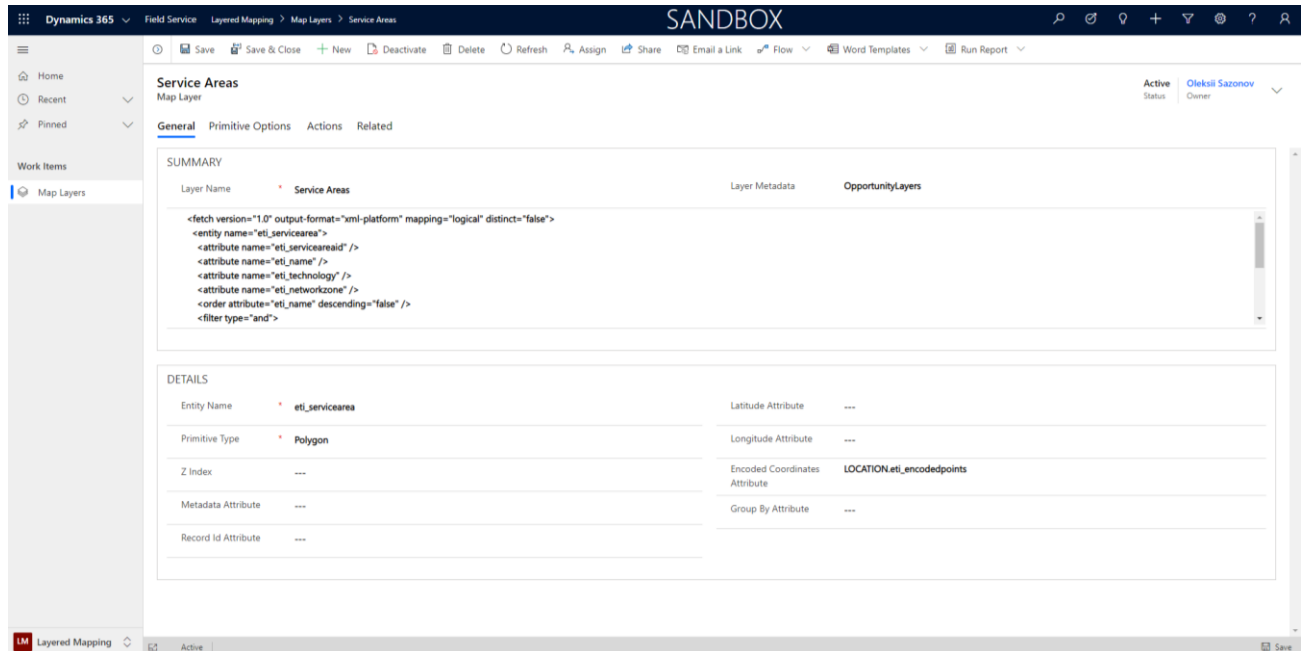
Click "Save & Close" to save your changes and create record.

As soon as service areas are configured, they become available during serviceability check on the lead stage

## Map Layers

You are now ready to create Map Layer. Map Layer is a flexible tool allowing you to bring any layer of data into the integrated maps. It is also possible to combine multiple layers to user's needs. You can also embed Actions and customize basic CSS within Map Layer.

To create new Map Layer, navigate to Layered Mapping in the bottom left corner and click "+ New" to create a new one.



**Service Areas**  
Map Layer

Active Status | Oleksii Sazonov Owner

General Primitive Options Actions Related

**SUMMARY**

Layer Name: Service Areas

Layer Metadata: OpportunityLayers

```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
  <entity name="eti_servicearea">
    <attribute name="eti_serviceareaid" />
    <attribute name="eti_name" />
    <attribute name="eti_technology" />
    <attribute name="eti_networkzone" />
    <order attribute="eti_name" descending="false" />
    <filter type="and">
```

**DETAILS**

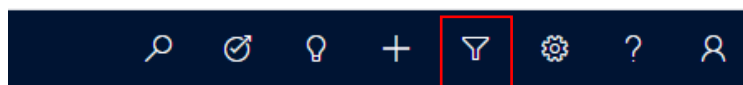
Entity Name	eti_servicearea	Latitude Attribute	---
Primitive Type	Polygon	Longitude Attribute	---
Z Index	---	Encoded Coordinates Attribute	LOCATION.eti_encodedpoints
Metadata Attribute	---	Group By Attribute	---
Record Id Attribute	---		

Required fields:

**Layer Name** – name of the Map Layer. This will be displayed on the map for the controlling purposes: to switch on and off the layer.

**Layer Metadata**. This field represents connector between multiple layers. Please make sure that value in this field is exactly the same between multiple layers if you need to display number of layers at once.

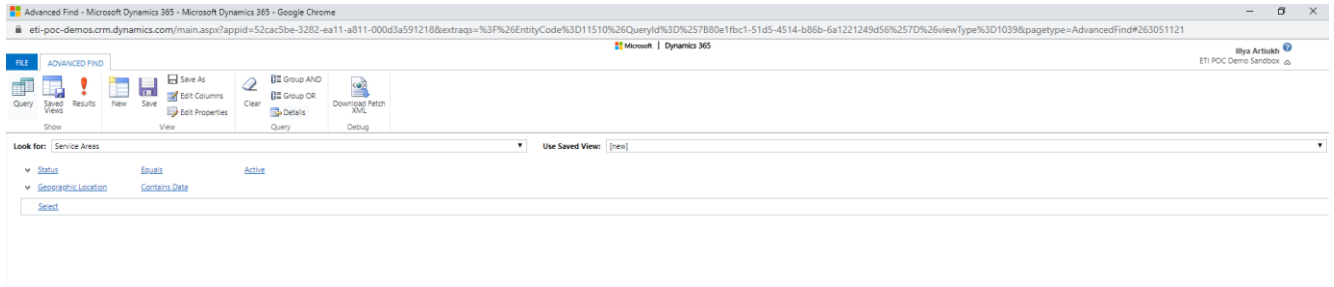
**FetchXML Field**. This field is required to be able to sort and select data to be displayed on the map. To get fetchXML navigate to Advanced Find in the Dynamics 365 Ribbon.



ort

Active Status | Oleksii Sazonov Owner

Look for required entity. In this guide we include example with previously created Service Area. Make sure that status of the record is Active. In this particular example we are looking for Geographic Locations to be displayed within the Map.



Configure columns for the advanced find view, adding geospatial attributes like latitude and longitude or encoded points is a mandatory step, adding other fields like name, status etc depends on your needs and requirements.

After that click on "Download Fetch XML" to get the code. Copy the code and paste it in the FetchXML text box. Please make sure to rename alias to more user-friendly name.

Service Areas

Map Layer

Active

Oleksii Sazonov

General

Primitive Options

Actions

Related

SUMMARY

Layer Name

\* Service Areas

Layer Metadata

OpportunityLayers

```

<condition attribute="statecode" operator="eq" value="0" />
<condition attribute="eti_geographiclocation" operator="not-null" />
</filter>
<link-entity name="eti_geographiclocation" from="eti_geographiclocationid" to="eti_geographiclocation" visible="false" link-type="outer" alias="LOCATION">
  <attribute name="eti_encodedpoints" />
</link-entity>
</entity>
</fetch>

```

DETAILS

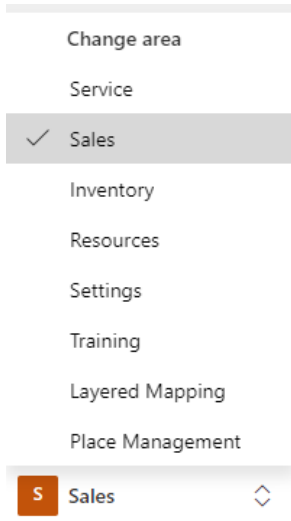
Entity Name	* eti_servicearea	Latitude Attribute	---
Primitive Type	* Polygon	Longitude Attribute	---
Z Index	---	Encoded Coordinates Attribute	LOCATION.eti_encodedpoints
Metadata Attribute	---	Group By Attribute	---
Record Id Attribute	---		

Fill in Entity Name with the entity schema name from the xml code. This is the target entity at the beginning to do the search within. Primitive Type is the object that you are going render on the map. To display area, choose Polygon. Make sure you update Encoded Coordinates Attribute with the new Alias. Save & Close to save the changes and create Map Layer.



## SERVICEABILITY CHECK

Serviceability check is using standard dynamics Lead to Opportunity process and adds-on to its functionality. To create new Serviceability Check, navigate to Sales Area from menu in the bottom left corner of the screen and click "+ New" in the top Menu Ribbon:



### My Open Serviceability Checks ▾

✓ | Name ▾

### Address Check

To start Serviceability Check type in the address into the search field:

Save Save & Close + New Flow

New Serviceability Check  
Serviceability Check - ETI Serviceability Check

Lead Source Warm Rating New Status Owner Ilya Artiukh

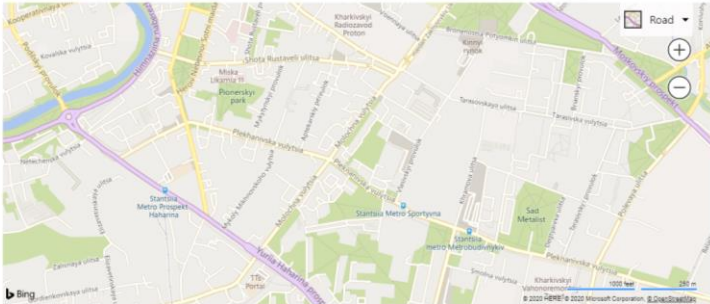
Lead to Opportunity Sale... Active for less than one mo. Quality (< 1 Min) Develop Propose Close

Address Check Customer Info Details Files

FIND ADDRESS  
1381 Richland SW Rd  
United States, GA, Atlanta, 1381 Richland Rd SW  
United States, GA, Atlanta, Richland Rd SW  
United States, TX, Richland, SW County Road 2344  
United States, KS, Rose Hill, SW Richland Rd  
United States, OK, Piedmont, Richland Rd SW

SERVICE AREAS  
Service Area Technology N.Zone

TECHNOLOGIES



Once the address is keyed in, it will automatically pick up related information about the address, using the map layers and display the address on the map. Based on previous configurations of the service areas you will see them on the lead map. You can filter service areas by selecting related Technologies from the list.

William Watson  
Serviceability Check - ETI Serviceability Check

Lead Source Warm Rating New Status Owner Ilya Artiukh

Lead to Opportunity Sale... Active for less than one mo. Serviceability (< 1 Min) Location Assign Product Selection OSP Requirements Order Billing Enable

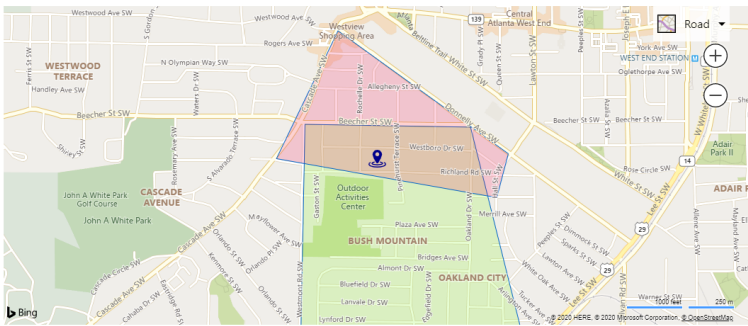
Address Check Customer Info Details Files Related

FIND ADDRESS  
United States, GA, Atlanta, 1381 Richland Rd SW

EXISTING ADDRESSES  
Full Address  
1381 Richland SW Rd Atlanta Georgia 30310 United States

SERVICE AREAS  
Service Area Technology N.Zone  
Fiber: Atlanta (NZ 1) Fiber NetZone #1

TECHNOLOGIES  
Fiber x Copper x





## Personal Information

Navigate to Customer Info tab to complete Serviceability check. Fill in First Name and Last name and change Customer type to preferred one (by default – Residential). Fill in the rest of the fields if needed. Click “Save” to save the record. You are now ready to complete Serviceability check with Qualification.

To Qualify Serviceability Check, click on “Qualify” in the top ribbon.

Save Save & Close New Delete Refresh Qualify Process Disqualify Assign Share Add to Marketing List Email a Link Follow Flow Word Templates

William Watson Serviceability Check ETI Serviceability Check

Lead to Opportunity Sale... Active for less than one mi... Serviceability (< 1 Min) Location Assign Product Selection OSP Requirements Order Billing Enable

Address Check **Customer Info** Details Files Related

**ESSENTIAL**

Topic	Fiber, Copper
First Name	William
Last Name	Watson
Account Name	William Watson
Customer Type	Residential
Business Phone	---
Mobile Phone	---
Email	---

**ADDRESS DETAILS**

Street 1	1381 Richland Rd SW
Street 2	---
Street 3	---
City	Atlanta
County	Fulton
State/Province	Georgia
ZIP/Postal Code	30310
Country/Region	United States
Latitude	33.73118
Longitude	-84.43288

**GEOGRAPHIC ADDRESS**

1381 Richland SW Rd Atlanta Georgia 30310 United States

**Timeline**

Search timeline

Enter a note...

Open Save



## SERVICE ORDER

Service Order process is modified Opportunity Business Process Flow, which helps to keep track of the situation with the Service Order and offers Step-by-step completion of the Service Order.

### Summary & Service Location

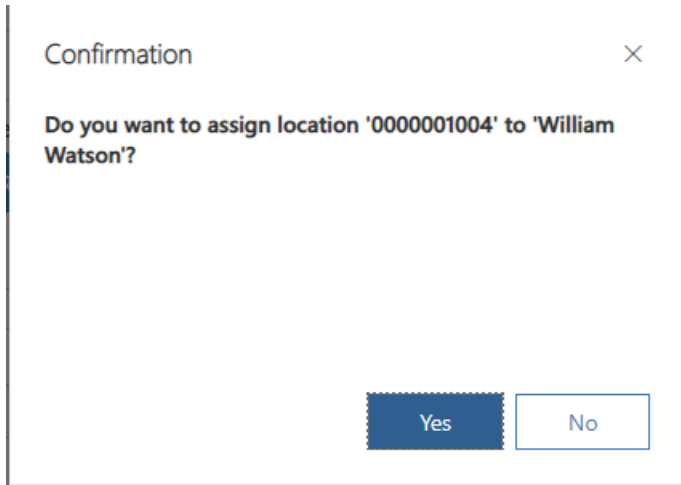
You are transferred automatically to the Summary tab after Qualification of the Serviceability Check. Fill out necessary information that is missing:

The screenshot shows the 'Summary' tab of a Service Order for 'Fiber, Copper'. The interface includes a top navigation bar with various actions like Save, Save & Close, New, Refresh, Close as Won, Close as Lost, Recalculate Opportunity, Convert to Work Order, Assign, Email a Link, Delete, Process, Share, and Follow. Below the navigation bar is a progress bar with steps: Location Assign (< 1 Min), Product Selection, OSP Requirements, Order, Fulfillment, and Billing Enable. The 'Summary' tab is active, showing fields for Topic (Fiber, Copper), Contact (William Watson), Account (William Watson), Sales Tax Code (Default Tax Code), Price List (Default Price List (USD)), and Description (Service order from Atlanta SW). A 'Timeline' section shows two events: 'Auto-post on William Watson' and 'Auto-post on Fiber, Copper'. The 'Current Situation' is 'No Internet', 'Customer Need' is 'Some Internet', and 'Proposed Solution' is 'Super Fiber Internet'. The 'STAKEHOLDERS' section shows William Watson as the Stakeholder. The 'SALES TEAM' and 'COMPETITORS' sections are empty.

Click on Service Location tab to proceed with assigning Service Location.

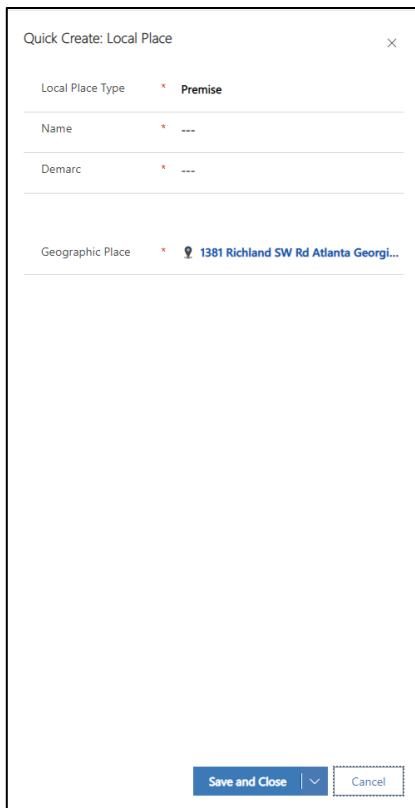
The screenshot shows the 'Service Location' tab of the Service Order. The progress bar indicates 'Location Assign (2 Min)'. The 'Geographic Place' is '1381 Richland SW Rd Atlanta Georgia 30310 United States'. The 'Service Location' section has two tables: 'PREMISE' and 'DEMARC'. The 'PREMISE' table has columns for Name, Demarc, and ID, with one row: 'Detached House', 'DRC 1823', '0000001004'. The 'DEMARC' table has columns for Name, Network Zone, and ID, with one row: 'DRC 1823', 'NetZone #1', '0000001005'. Below these tables are sections for 'INSTALLED ASSETS' and 'INSTALLED DEVICES', each with a table for tracking assets and devices.

You will see that info from the Place is already pre-filled for existing address. To assign Premise, select desired premise and click on Link icon.



A confirmation dialog box titled "Confirmation" with a close button (X) in the top right corner. The text inside asks: "Do you want to assign location '0000001004' to 'William Watson'?". At the bottom, there are two buttons: "Yes" (a solid blue button) and "No" (a white button with a blue border).

If there is no premise at that Geographic Address – click on Plus icon to initiate Quick Create of the new Premise and then assign it:

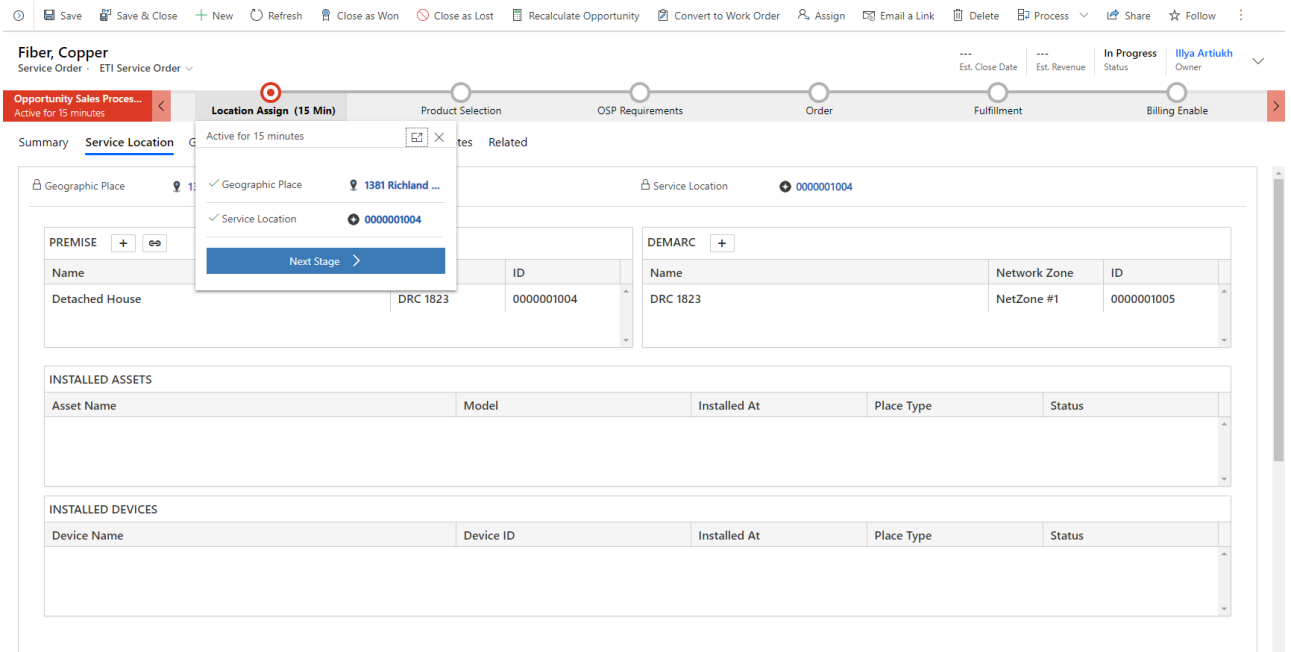


A "Quick Create: Local Place" dialog box with a close button (X) in the top right corner. It contains two sections. The first section, "Local Place Type", has a red asterisk and the text "Premise". Below this are fields for "Name" and "Demarc", each with a red asterisk and three dashes. The second section, "Geographic Place", has a red asterisk and a location pin icon followed by the text "1381 Richland SW Rd Atlanta Georgi...". At the bottom, there are two buttons: "Save and Close" (a solid blue button) and "Cancel" (a white button with a blue border).

**PLEASE NOTE:**

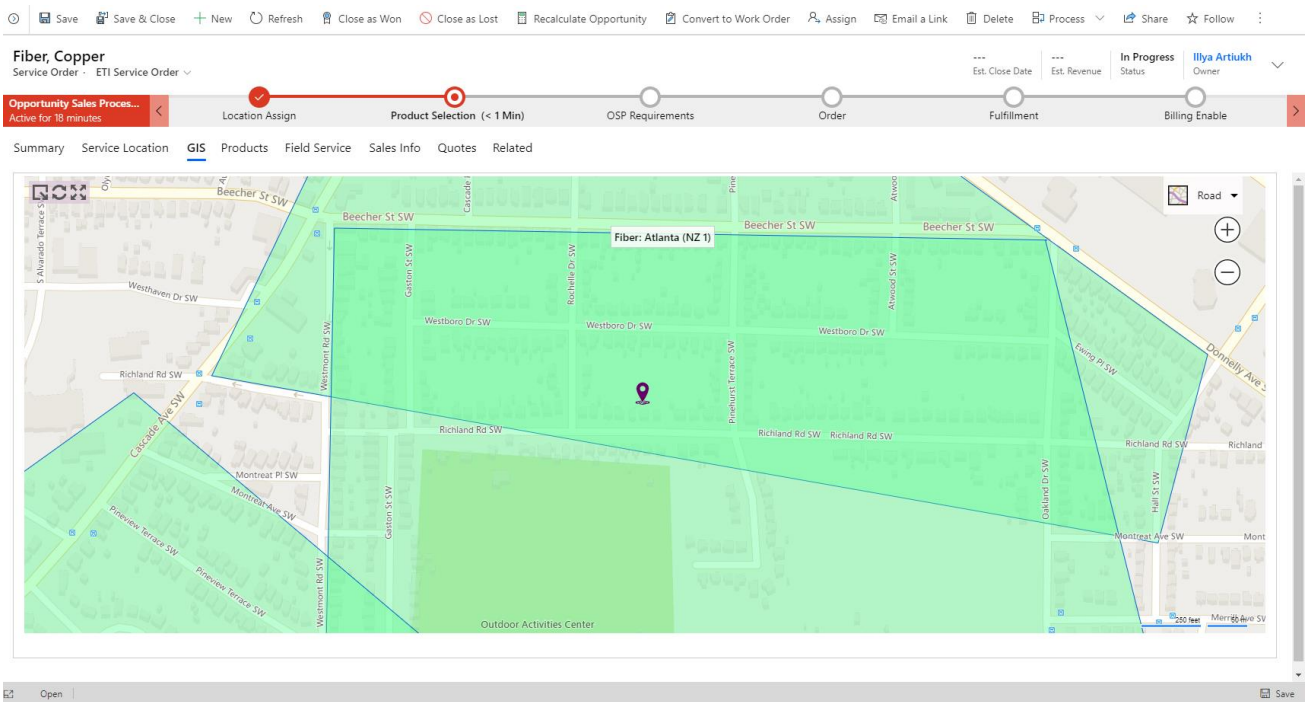
*Only Local Place of type Premise can be assigned as Service Location.*

Once Service Location is assigned click on the Business Flow Ribbon to ensure you've completed the step:



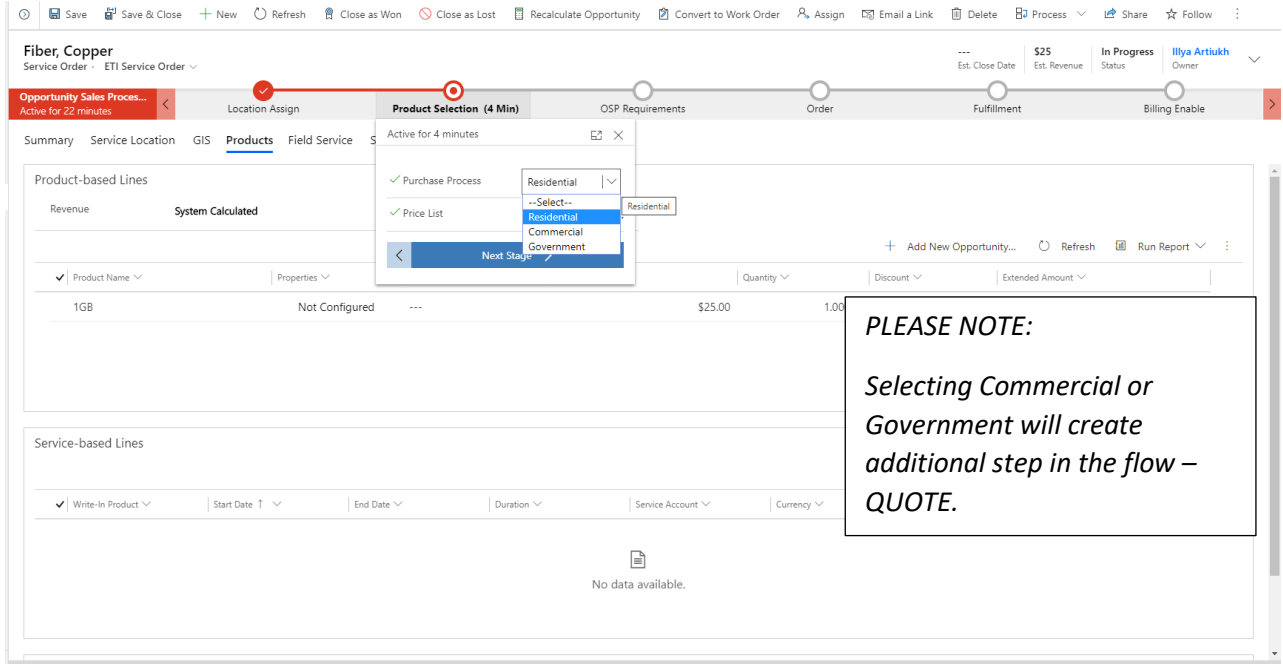
Click Next Stage to continue with the flow.

If you need to reference back to the Service Areas/Linear Assets or any Map Layers – navigate to GIS tab to display the map.



## Product Selection

To select the product first click on the correspondent step in the flow. Select one of the Purchase Processes.



**Fiber, Copper**  
Service Order · ETI Service Order

Opportunity Sales Process... Active for 22 minutes

Location Assign Product Selection (4 Min) OSP Requirements Order Fulfillment Billing Enable

Summary Service Location GIS **Products** Field Service

Product-based Lines

Revenue System Calculated

✓ Purchase Process Residential

✓ Price List --Select-- Residential

Commercial Government

Next Stage

Product Name	Properties	Quantity	Discount	Extended Amount
1GB	Not Configured	1.00		\$25.00

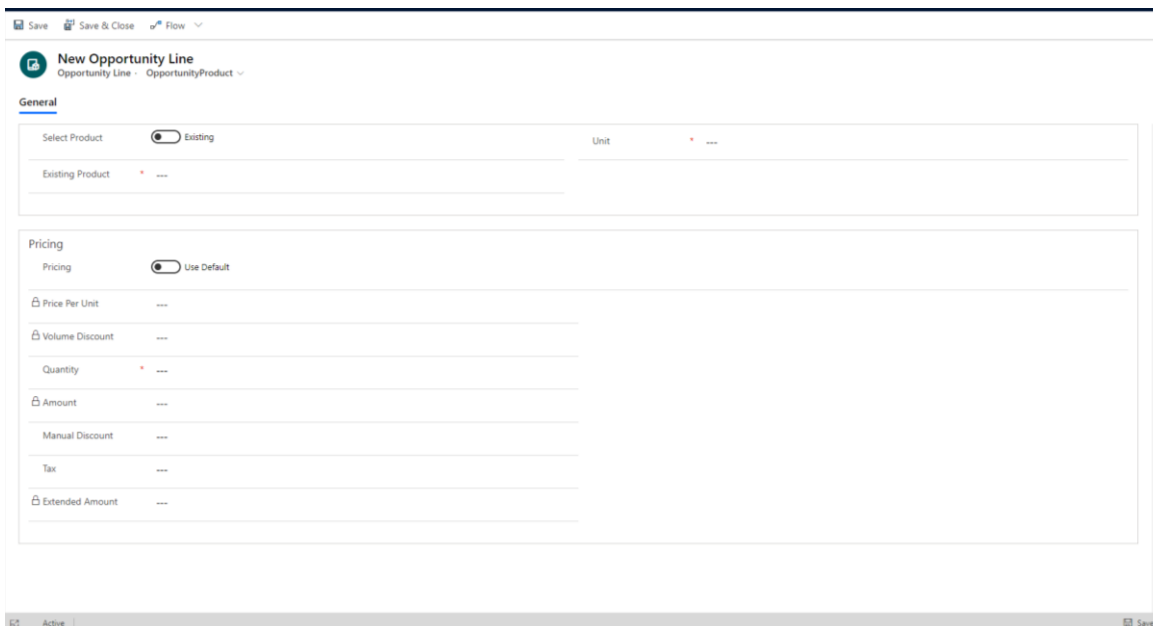
Service-based Lines

Write-In Product Start Date End Date Duration Service Account Currency

No data available.

**PLEASE NOTE:**  
Selecting Commercial or Government will create additional step in the flow – QUOTE.

Navigate to Products tab. This tab has standard Microsoft Dynamics 365 grid of the Opportunity Product. Please pre-create Products or use Write In products when creating Product-Based Line Items.



New Opportunity Line  
Opportunity Line · OpportunityProduct

**General**

Select Product Existing Unit

Existing Product

Pricing Use Default

Price Per Unit

Volume Discount

Quantity

Amount

Manual Discount

Tax

Extended Amount

Save Save & Close + New Refresh Close as Won Close as Lost Recalculate Opportunity Convert to Work Order Assign Email a Link Delete Process Share Follow

**Fiber, Copper**  
Service Order - ETI Service Order

Est. Close Date --- Est. Revenue \$25 In Progress Status Iliya Artiukh Owner

Opportunity Sales Process... Active for 32 minutes

Location Assign Product Selection (14 Min) OSP Requirements Order Fulfillment Billing Enable

Summary Service Location GIS Products Field Service Sales Info Quotes Related

Product-based Lines

Revenue System Calculated

+ Add New Opportunity... Refresh Run Report

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount
1GB	Not Configured	---	\$25.00	1.00000	---	\$25

Service-based Lines

+ Add New Opportunity... Refresh Run Report

Write-In Product	Start Date	End Date	Duration	Service Account	Currency	Price List	Extended Amount
No data available.							

Open Save

To finalize the Product Selection, click on correspondent step in the Flow and click Next.

Save Save & Close + New Refresh Close as Won Close as Lost Recalculate Opportunity Convert to Work Order Assign Email a Link Delete Process Share Follow

**Fiber, Copper**  
Service Order - ETI Service Order

Est. Close Date --- Est. Revenue \$25 In Progress Status Iliya Artiukh Owner

Opportunity Sales Process... Active for 34 minutes

Location Assign Product Selection (16 Min) OSP Requirements Order Fulfillment Billing Enable

Summary Service Location GIS Products Field Service Sales Info Quotes Related

Product-based Lines

Revenue System Calculated

+ Add New Opportunity... Refresh Run Report

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount
1GB	Not Configured	---	\$25.00	1.00000	---	\$25

Service-based Lines

+ Add New Opportunity... Refresh Run Report

Write-In Product	Start Date	End Date	Duration	Service Account	Currency	Price List	Extended Amount
No data available.							

Open Save

## OSP Requirements

At this stage it is required to check the work orders that are going to be initiated based on current situation with the Subscriber. It is simple Yes/No automated process, which prepares Work Orders to be created. Navigate to Field Service Tab to set up the work orders.



**Fiber, Copper**  
Service Order - ETI Service Order

Opportunity Sales Process... Active for 35 minutes

Location Assign Product Selection **OSP Requirements (< 1 Min)** Order Fulfillment Billing Enable

Summary Service Location GIS Products **Field Service** Sales Info Quotes Related

Fiber / Circuit ID ---

Fiber / Circuit Assigned ☐ No

Drop Type ☐ Aerial

Drop Present ☐ No

Demarc Built ☐ No

CPE Installed ☐ No

Device Assigned ☐ No

Work Order Type [Installation Work Order](#)

Incident Type [Fiber \(Aerial\)](#)

Need Work Order? ☒ Yes

Actual Work Orders 0  
Last updated: 5/6/2020 2:34 PM

Resolved Work Orders 0  
Last updated: 5/6/2020 2:34 PM

Canceled Work Orders 0  
Last updated: 5/6/2020 2:34 PM

WORK ORDERS

Work Order Number Primary Incident Type System Status

No data available.

Open Save

Assign Fiber/Circuit ID to start the process. Notice that Incident Type changes each time you select different value for Drop Type/Drop Present/Demarc built/etc.

**Fiber, Copper**  
Service Order - ETI Service Order

Opportunity Sales Process... Active for 41 minutes

Location Assign Product Selection **OSP Requirements (6 Min)** Order Fulfillment Billing Enable

Summary Service Location GIS Products **Field Service** Sales Info Quotes Related

Fiber / Circuit ID **3-1-1**

Fiber / Circuit Assigned ☒ Yes

Drop Type ☐ Aerial

Drop Present ☒ Yes

Demarc Built ☐ No

CPE Installed ☐ No

Device Assigned ☐ No

Work Order Type [Installation Work Order](#)

Incident Type [Demarc](#)

Need Work Order? ☒ Yes

Actual Work Orders 0  
Last updated: 5/6/2020 2:34 PM

Resolved Work Orders 0  
Last updated: 5/6/2020 2:34 PM

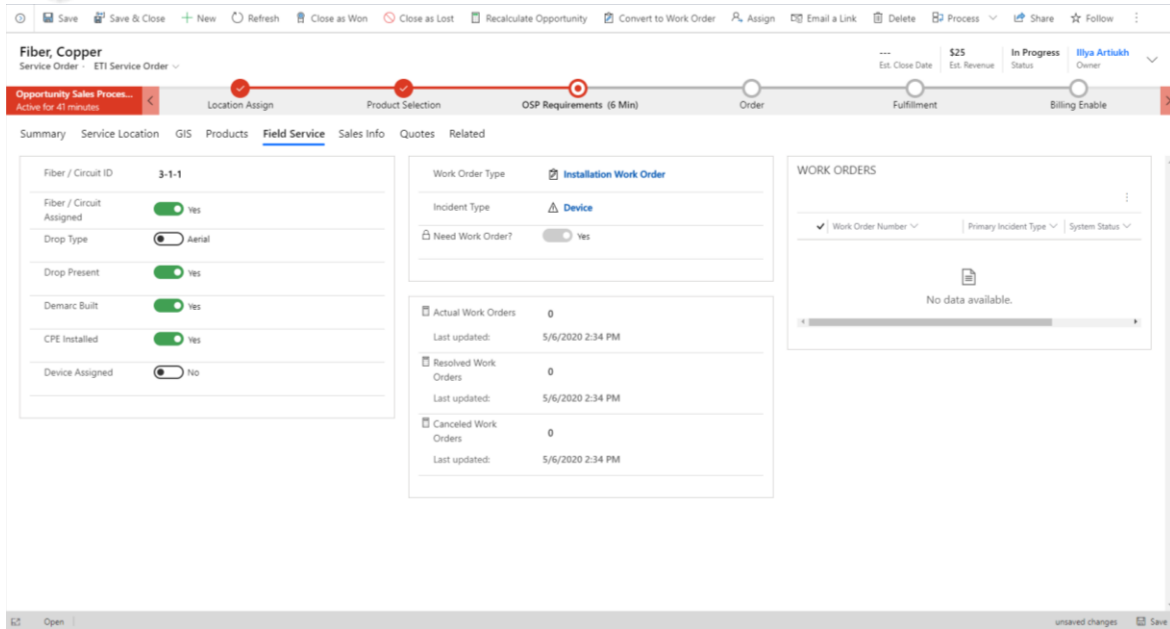
Canceled Work Orders 0  
Last updated: 5/6/2020 2:34 PM

WORK ORDERS

Work Order Number Primary Incident Type System Status

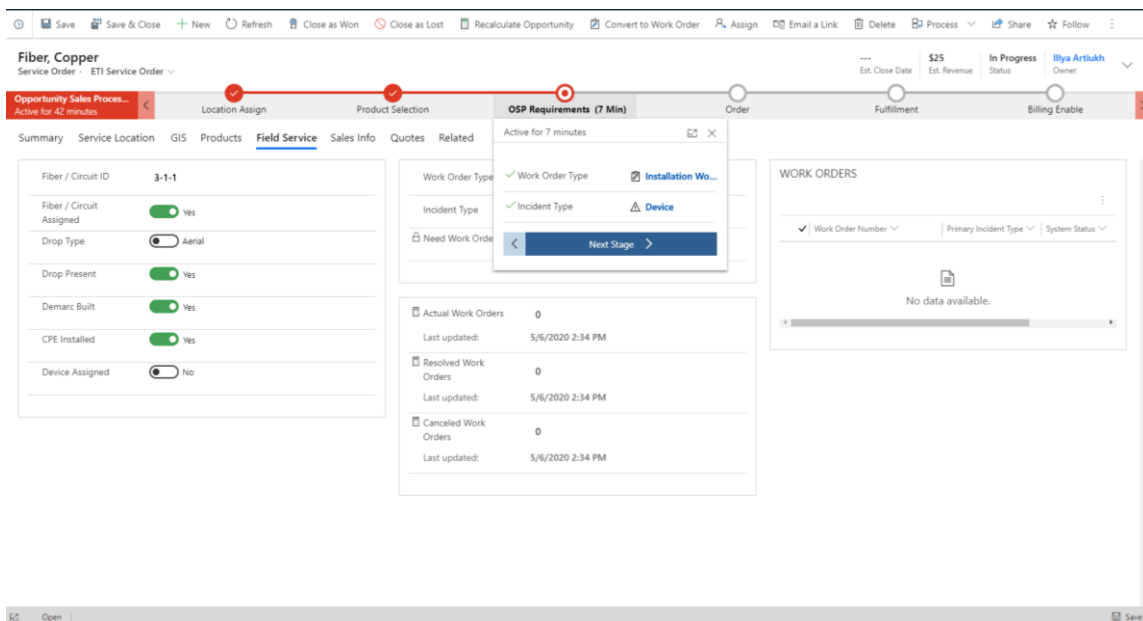
No data available.

Open unsaved changes Save



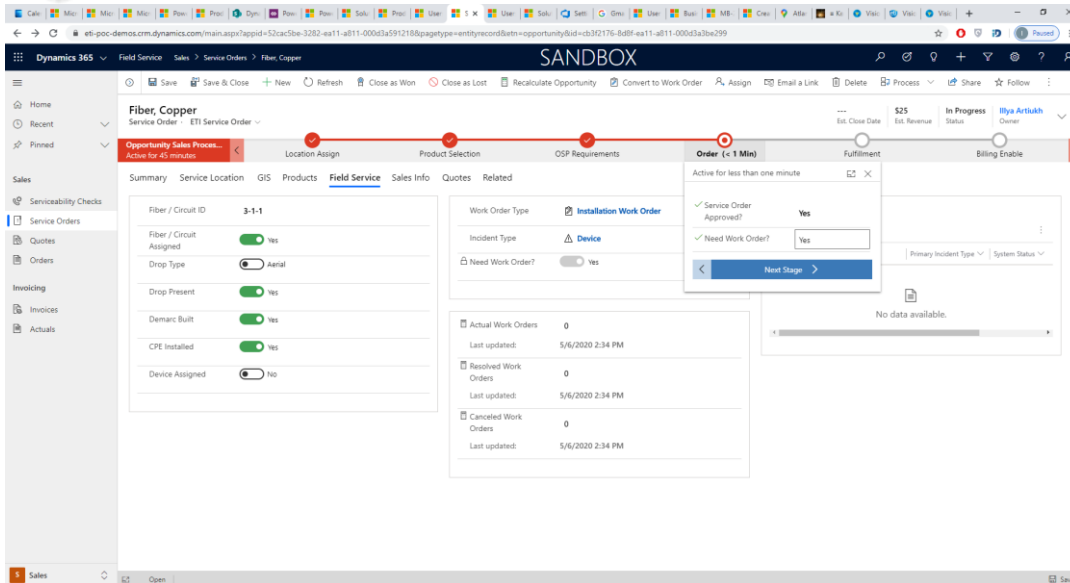
After operations with the Field Service requirements, click Convert to Work Order in the top menu Ribbon. Your work order/orders will now be automatically created based on Incident Types selected.

To finalize this step, click on correspondent step in the Flow and click Next Stage:



## Order

This step is designed to confirm that information has been delivered to Subscriber and Subscriber has issued either verbal or written confirmation of the Order.

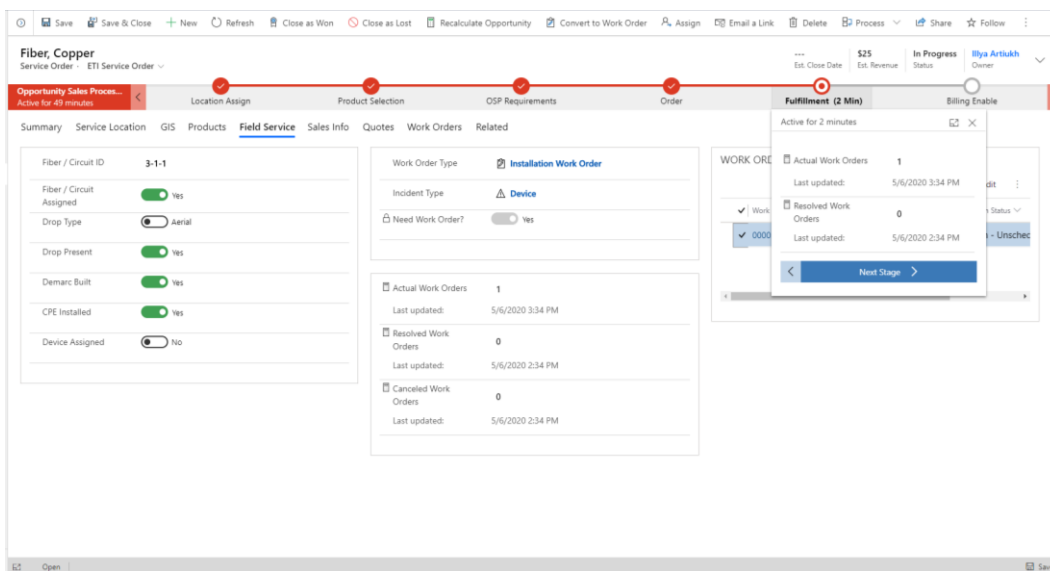


Click on Next Stage, once the confirmation is received.

## Fulfillment

This stage is designed to monitor the fulfillment of the service order, by tracking the completion of Work Orders.

You can access related work orders directly from the opportunity.



Click on Next Stage to move to the next step.



## Billing Enabled

Last step is Billing enabled. This value is changed to Yes when Subscriber billing has to be initiated.

The screenshot displays the ETI Service Order interface. At the top, a ribbon contains various actions: Save, Save & Close, New, Refresh, Close as Won, Close as Lost, Recalculate Opportunity, Convert to Work Order, Assign, Email a Link, Delete, Process, Share, and Follow. Below the ribbon, the header shows 'Fiber, Copper' and 'Service Order - ETI Service Order'. A progress bar indicates the current step is 'Billing Enable (< 1 Min)', with previous steps like 'Location Assign', 'Product Selection', 'OSP Requirements', and 'Order' marked as complete. The main content area is divided into three sections: 'Summary' (containing fields like Fiber / Circuit ID, Fiber / Circuit Assigned, Drop Type, Drop Present, Demarc Built, CPE Installed, and Device Assigned), 'Work Order Type' (containing fields like Work Order Type, Incident Type, and Need Work Order?), and 'Actual Work Orders' (showing counts for Actual, Resolved, and Canceled work orders). A 'WORK ORDERS' panel on the right shows a list of work orders with a 'Finish' button. A modal dialog box is open, asking 'Sales Order is created?' with a 'Yes' button and 'Enable Billing' with a 'No' button.

Click Finish to complete the flow. Click on Close As Won in the top Ribbon to close Service Order with success.

You are now able to work with the Subscriber Account.



## MICROSOFT DYNAMICS 365 FOR FIELD SERVICE DOCUMENTATION

For more information or reference, please follow these links to Microsoft Dynamics 365 for Field Service docs:

Learning Field Service:

<https://docs.microsoft.com/en-us/learn/browse/?products=dynamics-field-service>

Documentation:

<https://docs.microsoft.com/en-us/dynamics365/field-service/user-guide>



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**800.332.1078**, press option 1, day or night

**\*Email:** [techsupport@etisoftware.com](mailto:techsupport@etisoftware.com)

\*We would only ask that if your matter is more urgent in nature to give us a call so we can attend to your situation immediately.

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