

# Dynamics 365 Field Service

Accelerate your digital transformation initiatives to adapt to the changing customer ecosystem, where manual processes and long –standing silos create major organizational impediments to realizing ROI and driving digital growth.

## Business Focused Outcomes



IMPROVED  
EMPLOYEE  
EMPOWERMENT



INCREASED  
ROI



IMPROVED  
OPERATIONAL  
EFFICIENCIES



ACHIEVE  
INDUSTRY  
DIFFERENTIATION

## Approach

- Architectural design with complete catalogue of solution requirements, user stories, epics and as-is processes
- Defined to-be business processes and deployment storyboard
- Code and capabilities that meet user story requirements, including integrations, migrated data & features
- Training materials & key stakeholder training; Documented use cases for solution testing & migrated UAT and final production data
- Support for fully tested and approved solution



What new technology does is create new opportunities to do a job that customers want done

Tim O'Reilly



## SUPERCHARGE YOUR ORGANIZATION FOR SPEED, PRODUCTIVITY & INNOVATION



Retail & Technology



Energy & Utilities



Supply Chain & Logistics



Pharma



Discrete & Process Manufacturers

## Illustrative – Customer Stories

Cognizant's Client is a full-service real estate management company creating communities throughout New York City. Their properties under management relied on diverse suites of software packages, many of which have not been designed and implemented to be open to integration with each other. The Client decided to partner with Cognizant to implement Dynamics 365 as a key enabler of its Sales, Customer Service, Field Service, and related Legal processes. The project provided a single instance of D365 for shared services to enable a consistent experience across all participating properties, allow prospects to be tracked between properties, and enable a 360 view of tenants and services provided to them.

To facilitate the deployment of the solution to additional locations, data integration work was required to ensure a consistent view of data between the properties, financial management systems and the D365 instance. Our Client also placed great emphasis on the value of D365 Field Service and added it to their strategic roadmap. Cognizant configured and developed Field Service solutions for the following:

1. Out-of-the-box Entities: Account, Contact, Activity 'pointer' Emails, Tasks, Users, Teams, Custom Activities,
2. Field Service Entities: Bookable Resources and Bookings, Characteristics, Customer Assets, Incident Type, Requirement Group, Resource Requirement, Work Order, Work Order Incident, Work Order Product, Work Order Type, Agreements (i.e. preventive maintenance)
3. A custom Work Order Unit table

For a global food and preservative manufacturer, Cognizant delivered an end-to-end solution that manages the new product development aspect of their business built on D365 Field Service model driven apps and Power Platform to support rapid, low-code solution delivery. The solution manages and tracks all ingredients, equipment, and hazardous chemicals. The use case for Field Service was focused on internal processes such as the ability to track usage, maintenance, and cleaning of equipment and full traceability of allergens. Follow-up projects were undertaken to provide a project scheduling calendar for reserving labs and equipment and advanced reporting and analytics.



Microsoft Business Group

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