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Leveraging Scheduling Options in Dynamics 365 Field Service

February 14, 2023

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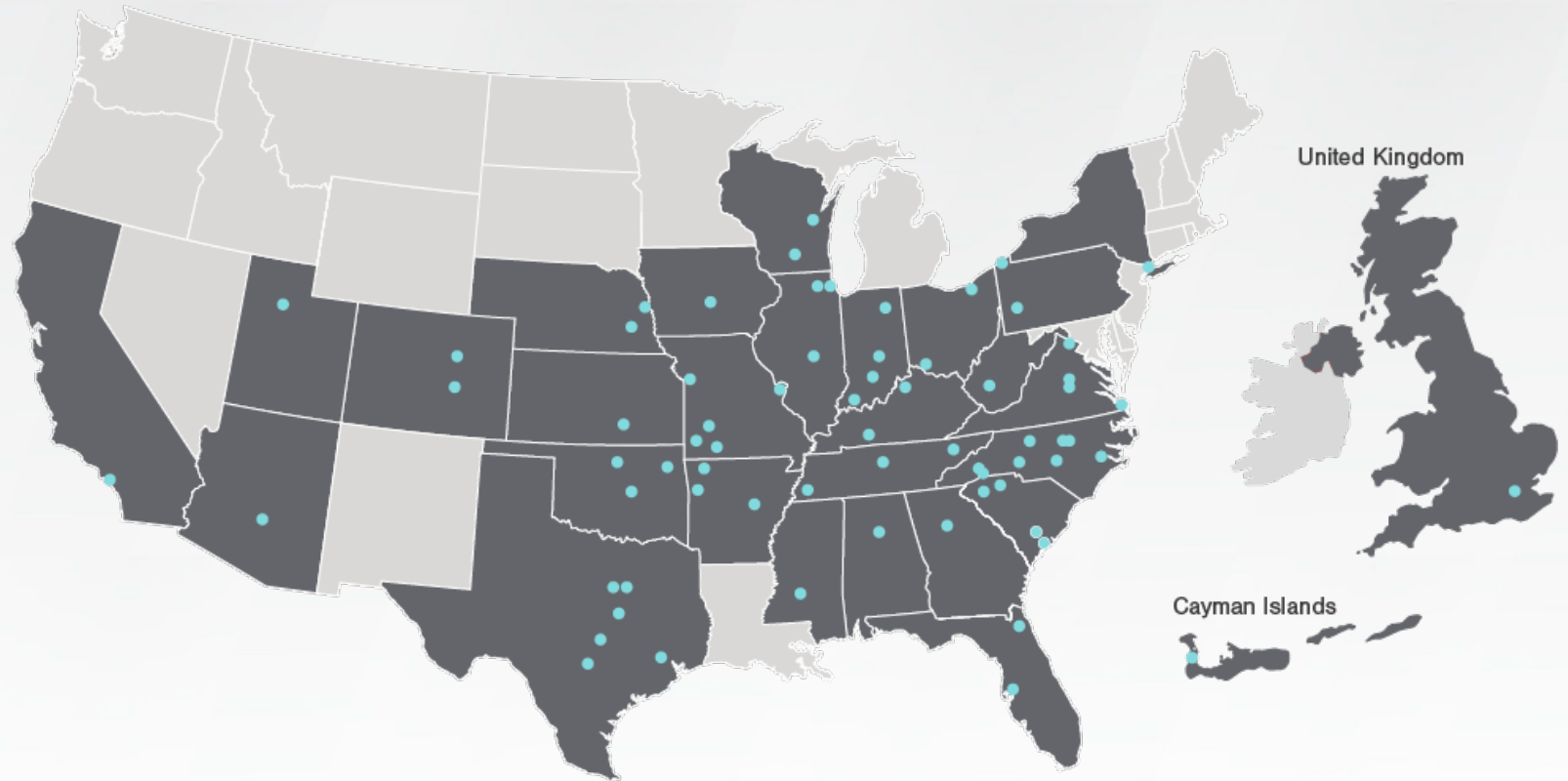
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Presenter

Tom Gioielli
Senior Managing Consultant

920.560.5551
tom.gioielli@forvis.com

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Objectives

- Describe the various scheduling options available in Microsoft Dynamics 365 Field Service

- Identify how to find resources to meet job needs by evaluating location, skills, & other characteristics

- Define how you can quickly assign jobs that may take multiple days, & how to allocate & record the time

- Explain ways to book a resource to a job, including using Quick Book functionality & the schedule board in Dynamics 365 Field Service

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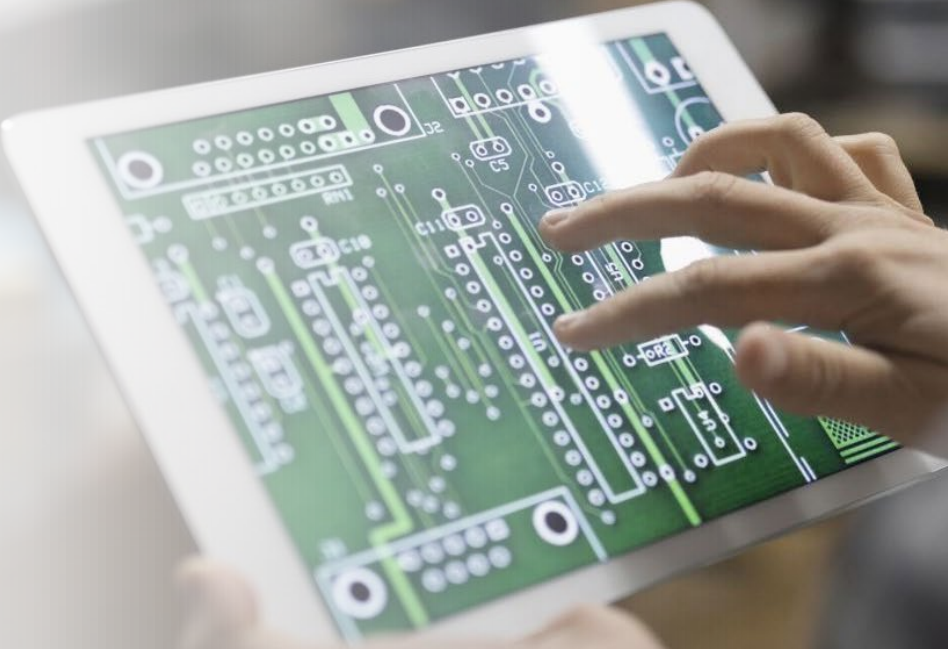# AGENDA

- Review Work Order & Resource Requirements

- Provide an Overview of Scheduling Methods

- Show Advanced Scheduling Options

- Q&A

Work Order & Resource Requirements

Resource Requirements

- Every Work Order has at least one Resource Requirement created by default

- This primary requirement record stays synchronized with the Work Order date windows & estimated duration

- Resource Requirements are used to schedule a booking

- You can edit & create additional requirements as needed

- Requirements allow you to define a duration, preferred resource type, skills & characteristics, location, or preferred resources

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Resource Requirements

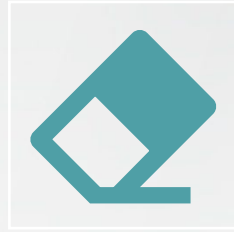- Review Resource Requirement record in the system

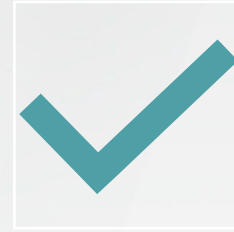# Scheduling Methods in Dynamics 365 Field Service

Booking Methods

Manually create a booking record

Drag & drop vs. manual allocation

Scheduling Assistant

Quick Book

Schedule Assistant Allocation

- **Front-Load:** Books time as early as possible while respecting other bookings

- **Full Capacity:** Books the resource for their full capacity over the chosen period. Does not respect existing bookings

- **Remaining Capacity:** Books the resource for whatever remaining time they have in the date range. Times can overlap with existing bookings

Schedule Assistant Allocation

- **Percentage Capacity:** You define what percent of the capacity to book the resource for in the selected time range. Does not respect existing bookings or duration

- **Evenly Distribute:** Split the requirement duration evenly across the full date range. Does not respect existing bookings

- **Fixed Time:** Same as manually creating a booking, user-defined start & end times

Resource Requirements

Allocation Method	Respects Existing Bookings	Respects Requirement Duration	Creates Multiple Bookings for Multi-Day Jobs
Front-Load	☑	☑	☑
Full Capacity	🚫	🚫	☑
Remaining Capacity	☑	🚫	☑
Percentage Capacity	🚫	🚫	☑
Evenly Distribute	🚫	☑	☑
Fixed Time	🚫	🚫	🚫

Schedule Assistant Allocation

- Review examples in Dynamics 365 Field Service

Advanced Scheduling Options

Quick Booking

- Must be enabled in Field Service settings

- Uses Resource Requirement information to find available resource options directly from the Work Order

- Recommended best practice: Use short service visits based on geography & technician location

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Quick Booking

- Review example in Dynamics 365 Field Service

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Resource Schedule Optimization (RSO)

- Advanced booking method for more mature organizations, considered the final stage of the Scheduling Roadmap by Microsoft

- Set up rules & priorities (minimize travel time, distance, or resource utilization) & let the system automatically book resources

- Uses all provided information to find the best available resource

- Additional license cost

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