

Service to Cash Overview in Dynamics 365



Agenda

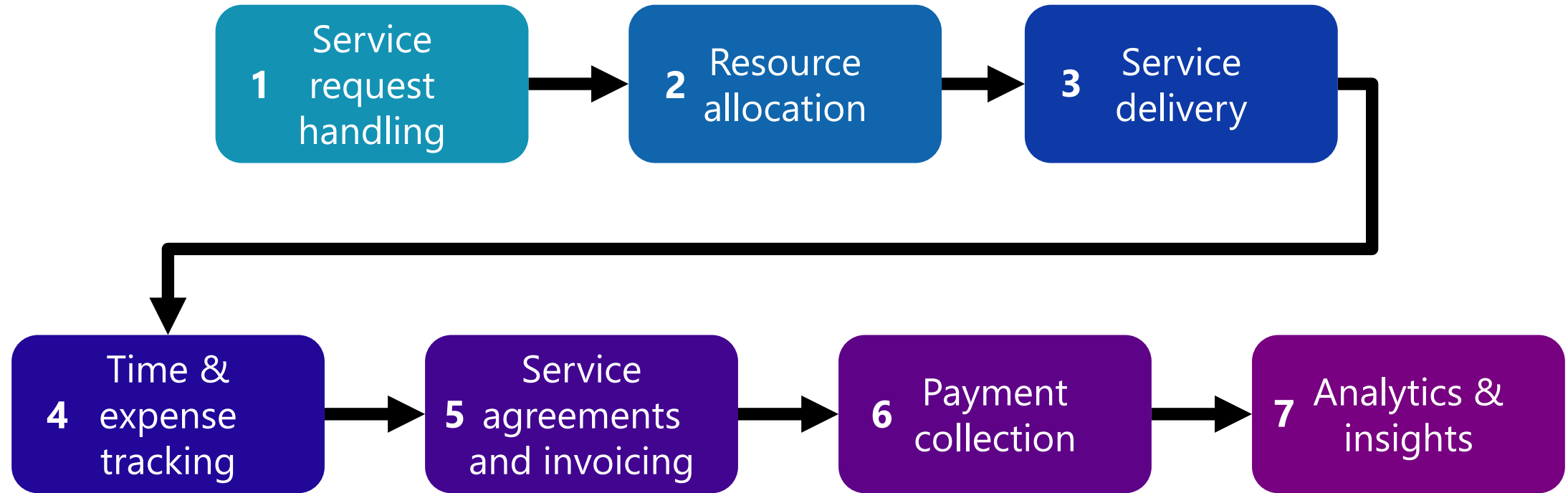
- Service to Cash: Overview
- Service to Cash: Business Process
- Service to Cash: User Stories and Demos
- Resources
- Q&A

Service to Cash Overview

Dean Hardy



What is Service to cash?



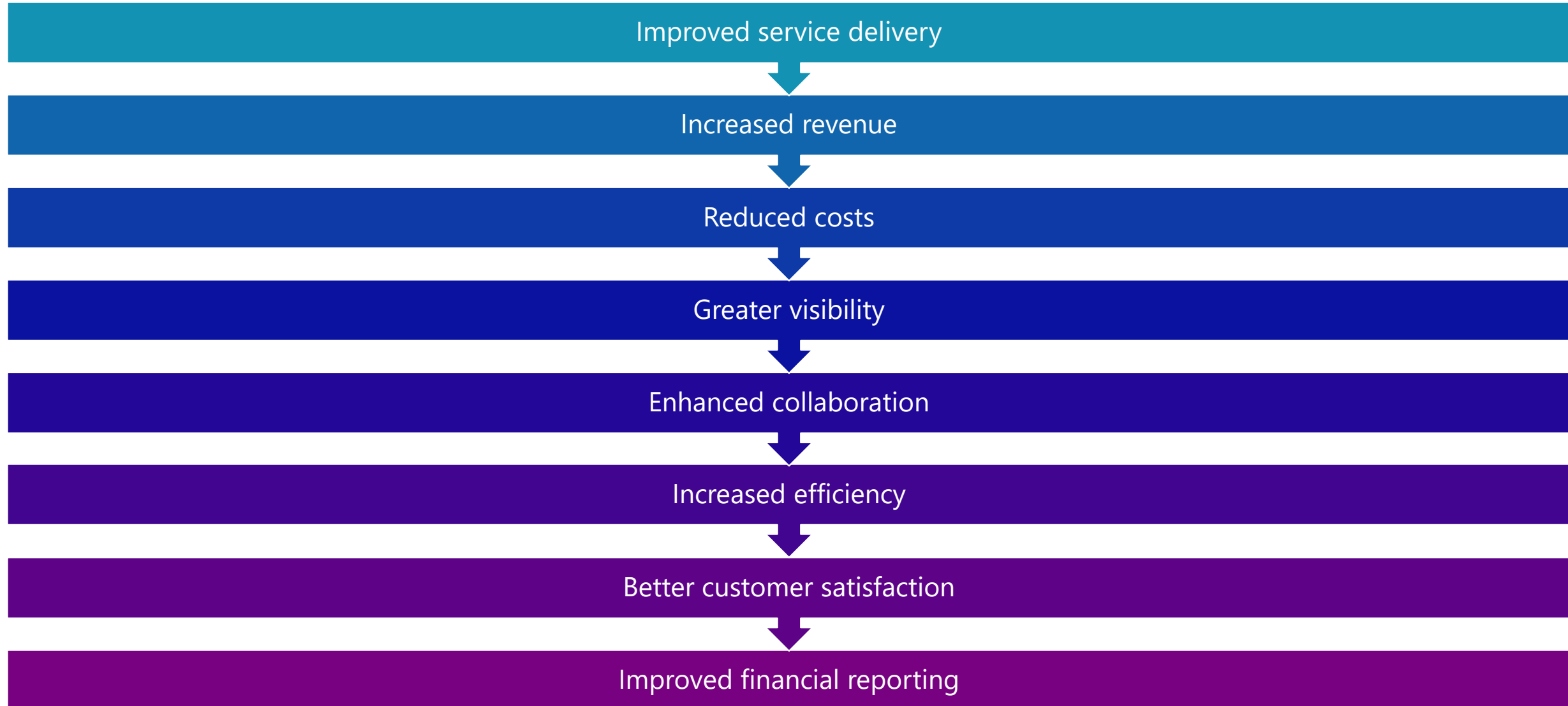
Service Types



Depot vs. Field

Internal vs. Customer

Service to Cash Benefits



Service to Cash – Stakeholders

Customer
Service
Stakeholders

Service
Stakeholders

Planning
Stakeholders

Supply Chain
Stakeholders

Finance
Stakeholders

Human
Resource
Stakeholders

Process Driven Solution Architecture

Framework	Process Example						Implementation
L1 – End to End	Service to Cash						<ul style="list-style-type: none"> • Collection • Test Suites • Custom Work Item Type • Dimensions • Tags
L2 – Process Area	Manage service assets		Create and process service work		...		<ul style="list-style-type: none"> • Epics • Workshops • Custom Work Items Types • Dimensions • Tags
L3 – Business Process	Setup customer assets		...	Schedule service work		...	<ul style="list-style-type: none"> • Features
L4 – Scenario	Build asset hierarchies	Replace customer asset	Schedule crews		<ul style="list-style-type: none"> • User Stories • Link - Configuration Work Item • Link – Test Case • Link – Documentation Deliverable

Service to Cash

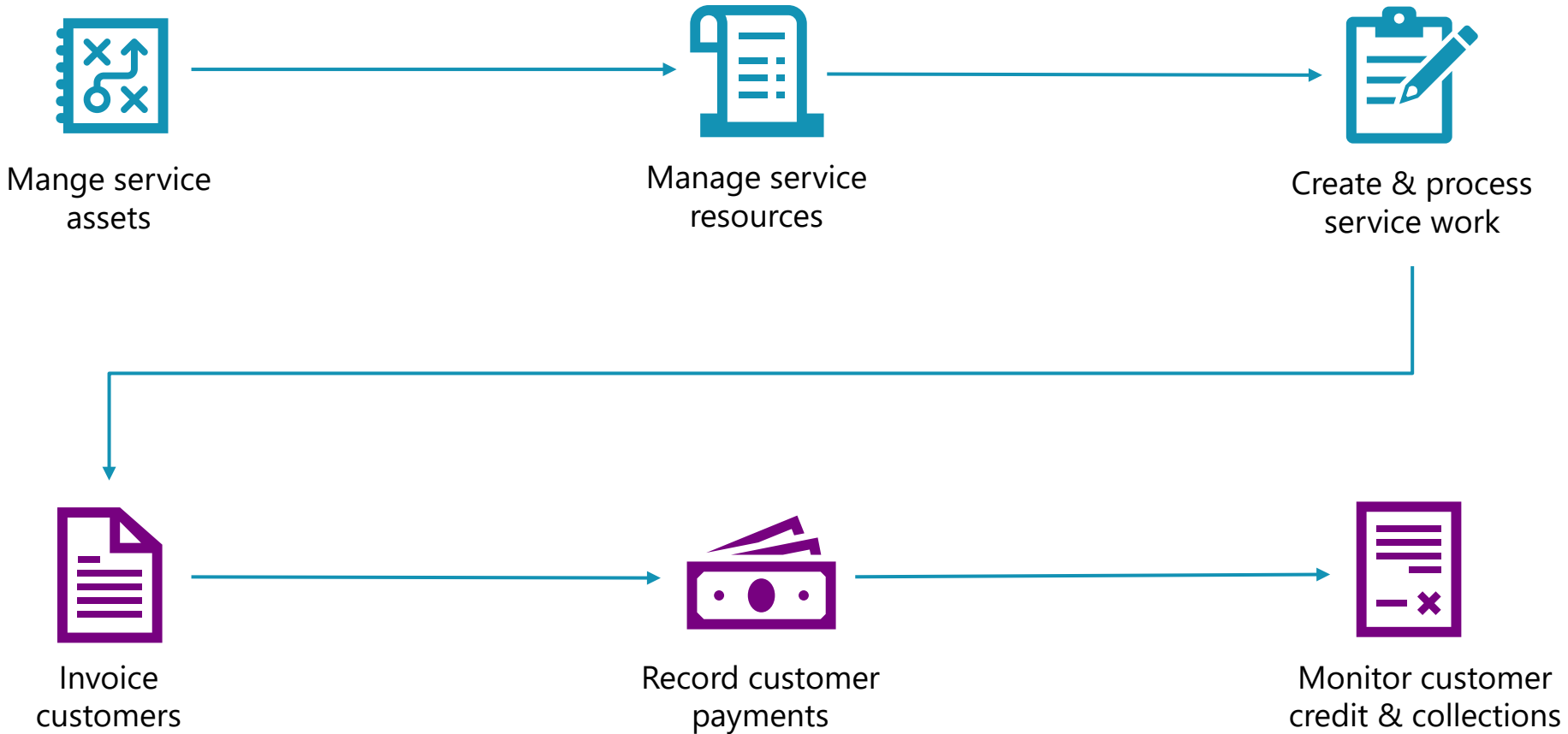
Business processes areas

Dean Hardy



Service to Cash Business Process Areas

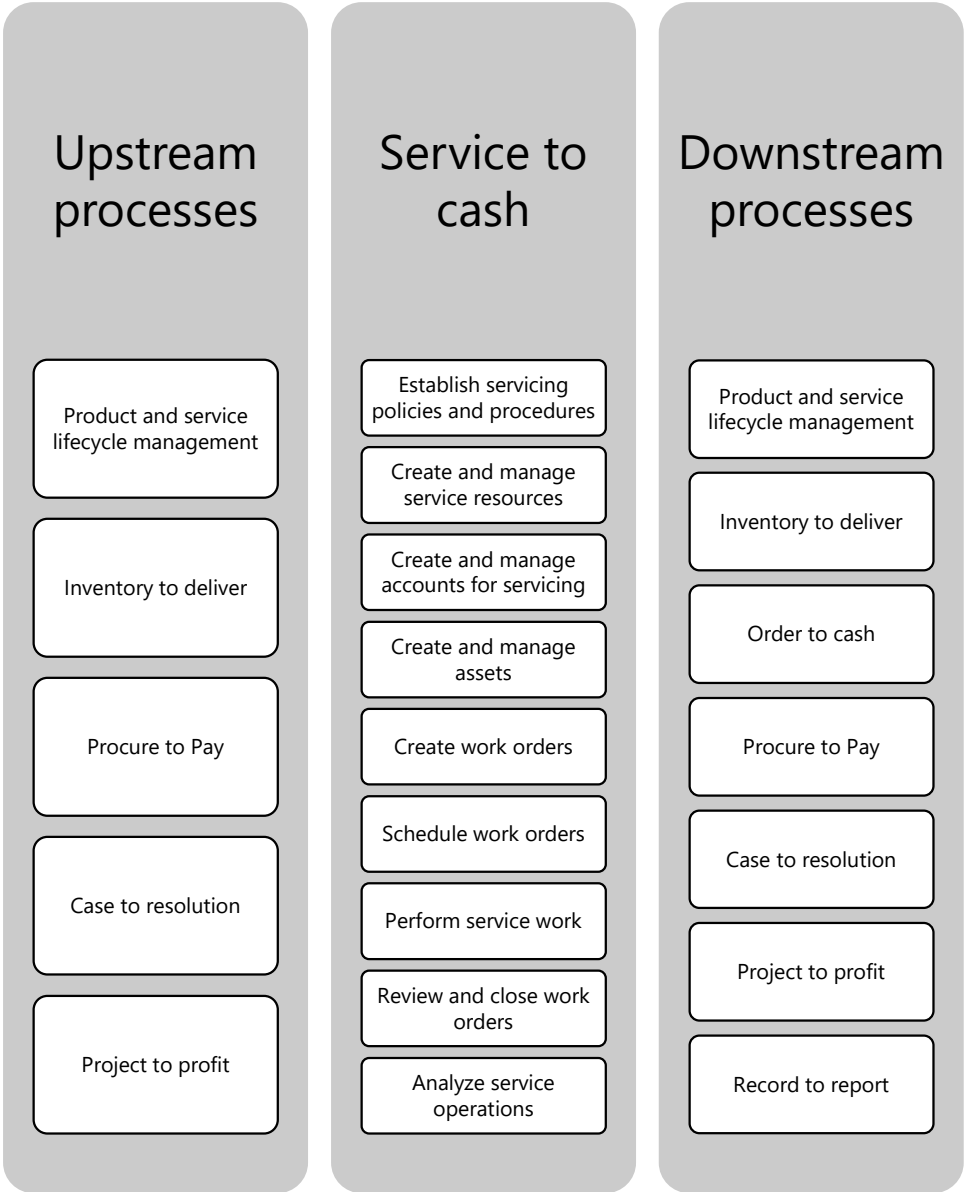
Level 2
(Epics)



Service to Cash

Order to Cash

Service to Cash Process Relationship



Service to Cash

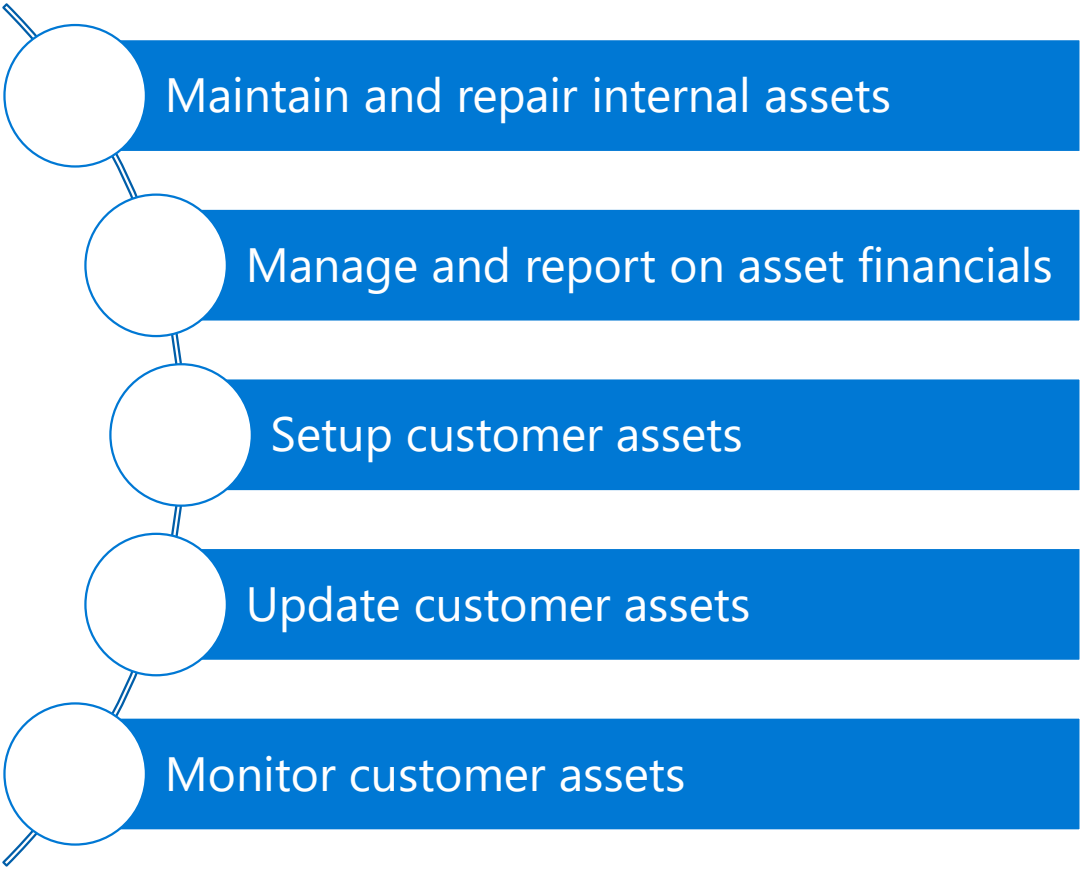
Manage service assets

Dean Hardy



Service to Cash – Manage service assets

Level 2
(Epics)

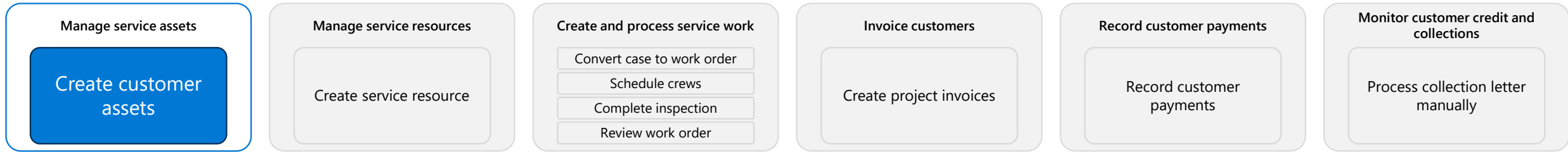


Level 3
(Features)

User Story 1: Create customer assets manually

Dean Hardy

User Story – Create customer assets manually



Contoso Utilities provides home electrical servicing to many customers across the country.

Ashley Chin, a Service Administrator, wants to add a new asset to a service customer's account to represent the serviceable equipment at the service location so Technicians can record their service activities on it.



Home



Recent



Pinned



My Work



Get Started



Dashboards

Scheduling



Work Orders



Schedule Board



Bookings



Resource Require...



Requirement Grou...



Time Off Requests



Time Entries

Customers



Accounts



Contacts



Service



Focused view



Show Chart



Edit



Activate



Deactivate



Delete



Share



All Accounts



Quick find



Account Name ↑

Main Ph...

Address...

Primary Contact

Email (Primary ...



A Datum Corporation

425-555-...

Redmond



A Datum Fabrication

303-555-...

Denver



A Datum Integration

512-555-...

Austin



Abraham McCormick

Redmond

Abraham McCor...

abraham_mccorn



Adventure Works

812-555-...

Blooming...

Amos Conger



Adventure Works Electronics

305-555-...

Tampa

Brandie Diaz



Adventure Works Engineering

917-555-...

New York

Eva Colon



Adventure Works Instrumentation

813-555-...

Tampa

Consuelo Moses



Adventure Works Integration

412-555-...

Pittsburgh

Pearlie Blackburn



Blue Yonder Airlines

+33 1234...

Paris



City Power & Light

+44 20 7...

London



City Power & Light Assembly

425-555-...

Seattle

Rows: 74

Selected: 1

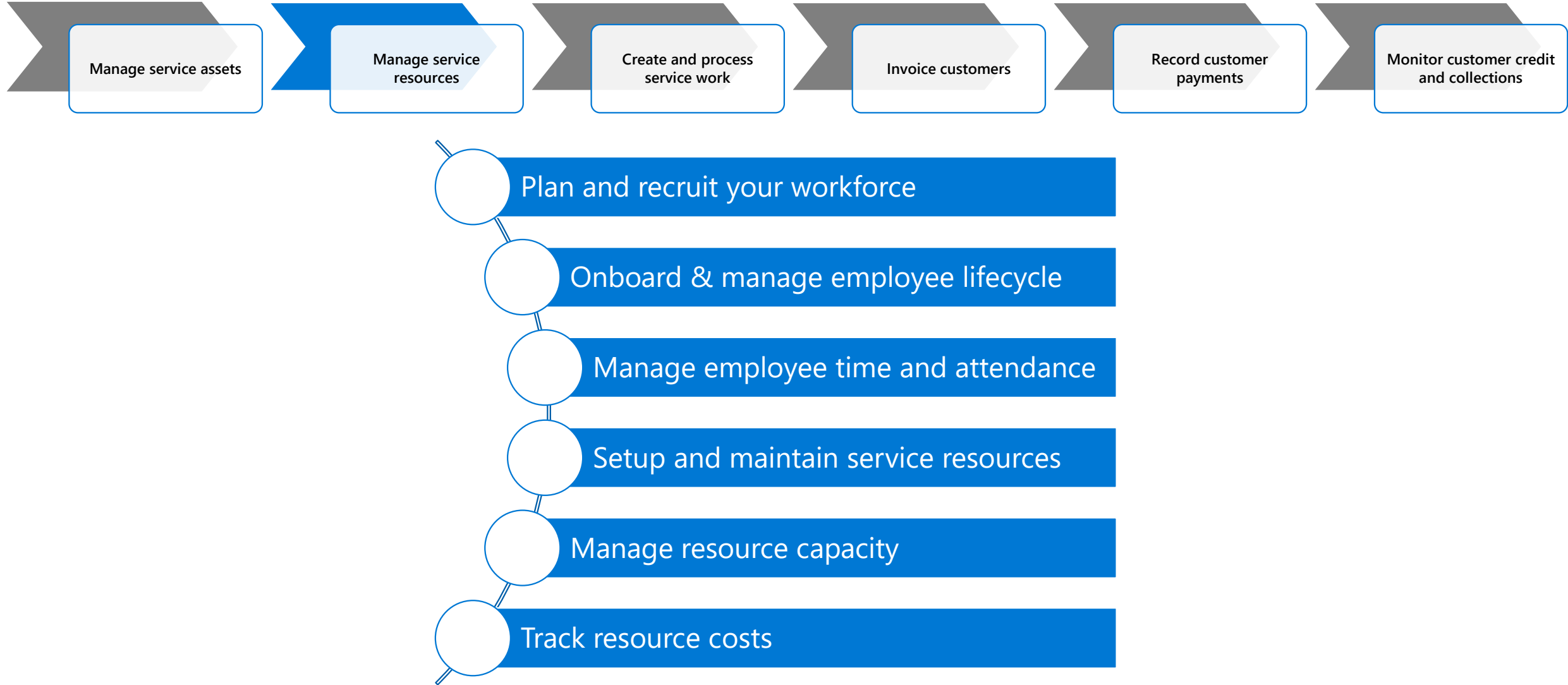
Service to Cash

Manage service resources

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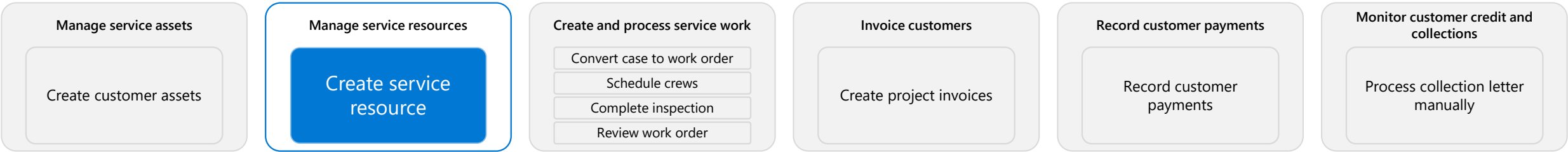
Service to Cash – Manage service resources



User Story 2: Create a service resource

Dean Hardy

User Story – Create a service resource



Contoso Utilities provides home electrical servicing to many customers across the country.

Ashley Chin, a Service Administrator at Contoso Utilities, wants to setup a bookable resource record for a new Service Technician, Bob Kozak, that will be joining the company next week.



Home



Recent



Pinned



Resource



Resources



Characteristics



Categories



Pay Types



Proficiency Models



Work Hours Temp...



Requirement Grou...



Requirement Stat...

Booking Settings



Booking Statuses



Booking Rules



Fulfillment Prefere...

Administration



Bookings Setup M...



Resources



Focused view



Show Chart



New



Delete



Refresh



Visualize this view



Share



Active Bookable Resources



Quick find



Name ↑

Resource Type



Abraham McCormick

Contact



Allison Dickson

Contact



Ashley Chinn

Contact



Bernadette Foley

Contact



Brady Hannon

Contact



Candie Chao

User



Cheri Castaneda

Contact



Christal Robles

Contact



Christie Dawson

Contact



Clarence Desimone

Contact



Davis Flournoy

Contact



Dawn Phelps

Contact

Rows: 100

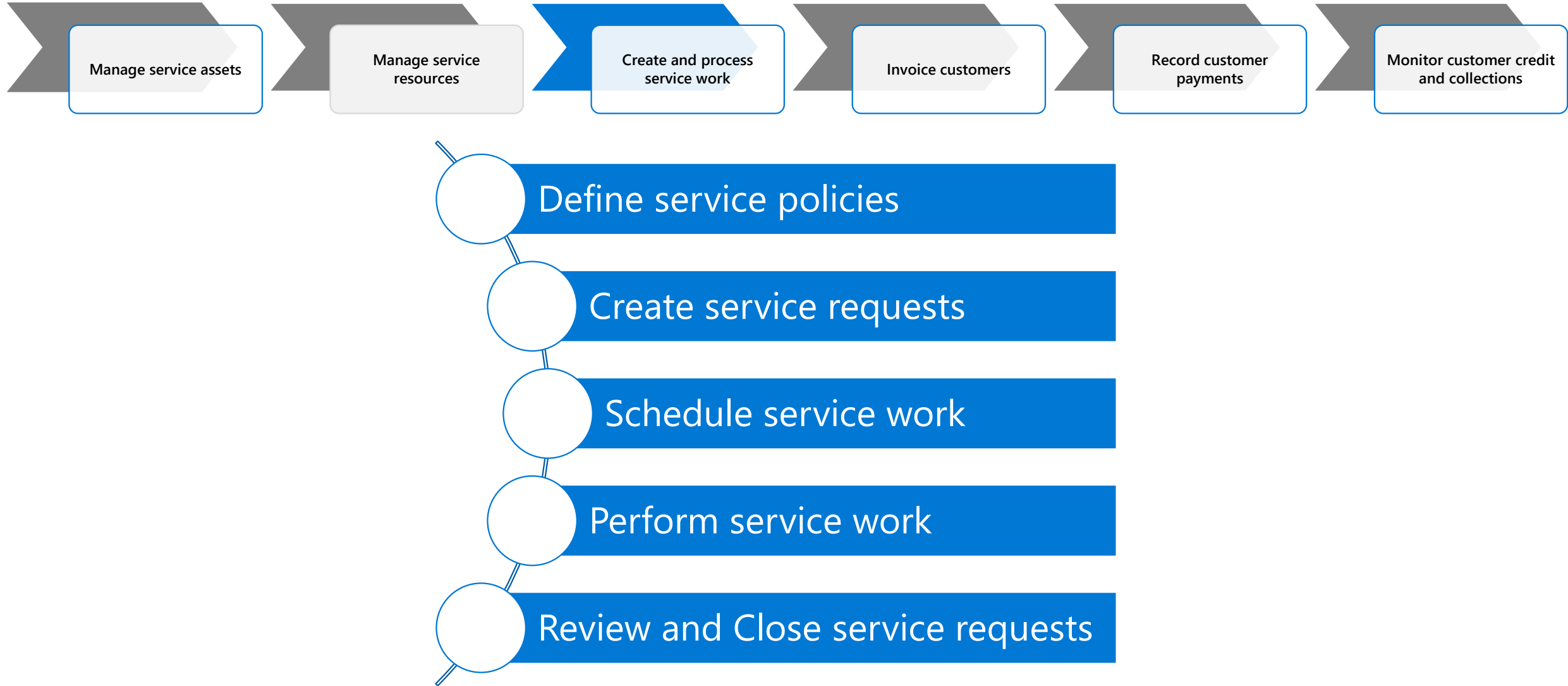
Service to Cash

Create and process service work

Jason du Plessis



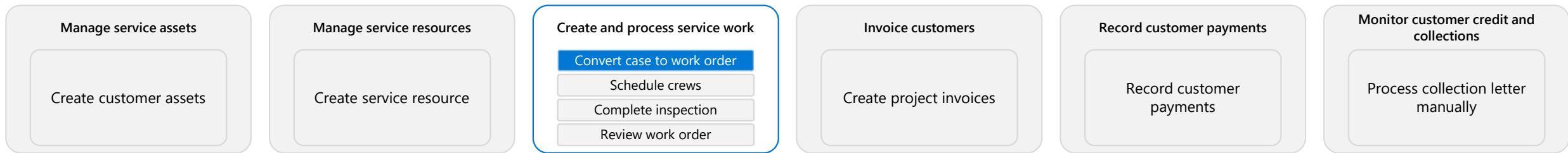
Service to Cash – Create and process service work



User Story 3: Manually convert support case to work order

Jason du Plessis

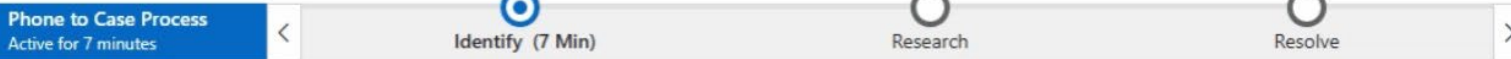
User Story – Manually convert support case to work order



Case creation is part of Dynamics 365 Customer Service. Converting this to a work order allows the case to be scheduled and executed as part of Dynamics 365 Field Service



Washing machine will not turn on - Saved Normal Priority 5/17/2024 2:33 PM Created On In Progress Status JP Jason du Plessis Owner



Summary Case Relationships Associated Knowledge Records Enhanced SLA Details Additional Details **Field Service** ...

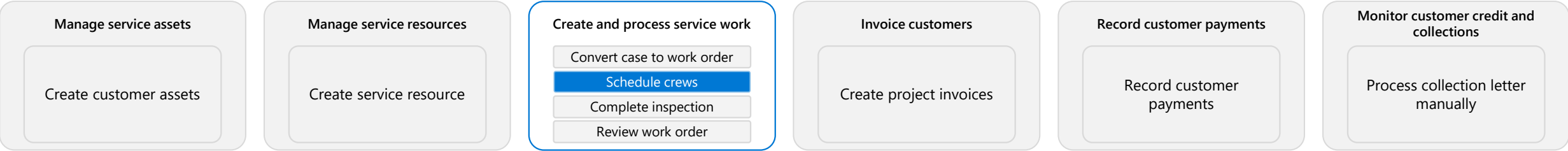
Incident Type ⚠ Faulty Washing Machine ×

Functional Location ---

User Story 4: Schedule Crews

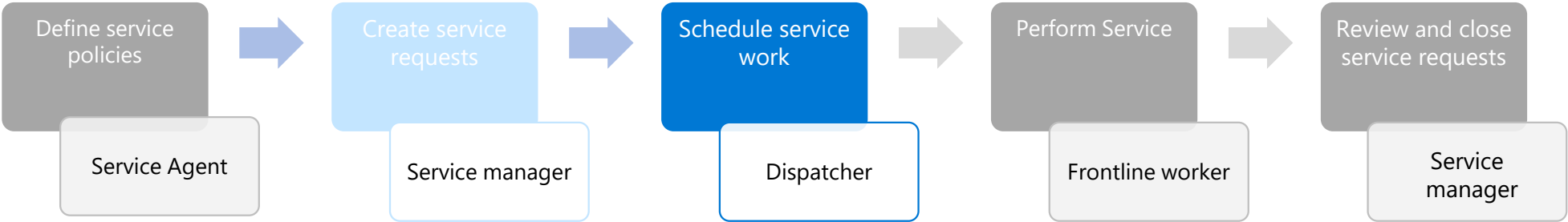
Nuno Cruz

User Story – Schedule crews



The new service work demands careful planning due to the heavy equipment and complex process involved. It is necessary to coordinate a team of two qualified members who can collectively complete the service in one visit.

Brain Rey, a Dispatcher at Contoso Utilities, wants to create a booking to schedule to two resources to visit Abraham’s home to perform the necessary service work.



Home

Recent

Pinned

My Work

Get Started

Dashboards

Scheduling

Work Orders

Schedule Board

Bookings

Resource Requireme...

Requirement Groups

Time Off Requests

Time Entries

Customers

Accounts

Contacts

Service Delivery

Cases

Agreements

Assets

Assets

Functional Locations

IoT Alerts

IoT Devices

Service

Hello, Nuno Cruz.

Welcome to Microsoft Dynamics 365 Field Service

Streamline service delivery with next-generation tools for your frontline.

Learn more about Field Service

New

Ask Copilot to find key work order information

Stay up to date as work orders progress. Get intelligent recaps and quick answers from Copilot in Dynamics 365 Field Service.

Learn more

Optimize technician efficiency with new mobile experience

Save time with the new mobile experience. Enhance frontline productivity by providing the right information at the right time.

Learn more

Enhanced Work Order Management Experience

Discover the redesigned work order management experience, offering concise information, relevant next steps, and AI intelligence by Copilot.

Learn more

Get up and running

Set up your users

Frontline workers are primarily scheduled for on-site jobs and use Dynamics 365 Field Service mobile. [Learn more](#)

We recommend enabling Field Service mapping and location features for directions and resource schedule optimizations. [Set up](#) [Resources](#)

Create your accounts

Service accounts represent who is receiving the on-site service and where the frontline worker will be dispatched. [Learn more](#)

Create [Accounts](#)

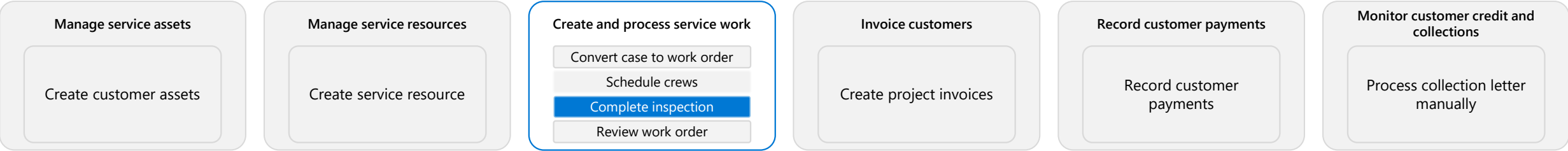
Create your work orders

Work orders define what work needs to be done, for whom, and where. [Learn more](#)

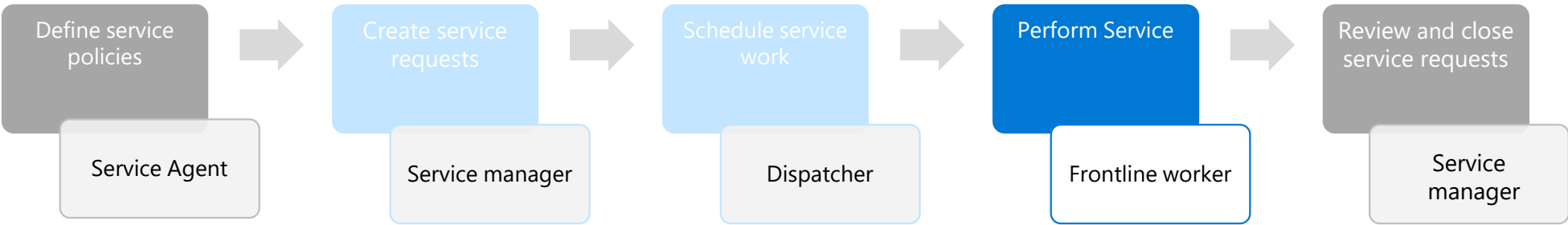
User Story 5: Complete Service Inspection

Jason du Plessis

User Story – Complete service inspection



The actual executive of the service work by the Field Service engineer includes multiple steps and possible activities.





Home

Recent

Pinned

My Work

Bookings

Activities

Work Orders

Products

Customers

Assets

Time Reporting

FS Field Service



+ New

Refresh

Visualize this view

Email a Link



Bookings*



Filter by keyword

Today



May



Agenda

19 Sun

20 Mon

21 Tue

May 22 We

23 Thu

24 Fri

25 Sat

Today - Wednesday, May 22, 2024

02:27 PM **Abraham McCormick**
30m **Faulty Washing Machine**
● In Progress

Tomorrow - Thursday, May 23, 2024

Friday, May 24, 2024

Saturday, May 25, 2024

Sunday, May 26, 2024

Monday, May 27, 2024

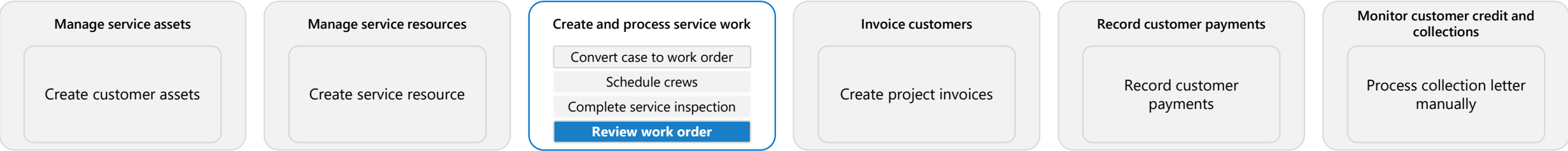
Tuesday, May 28, 2024

Wednesday, May 29, 2024

User Story 6: Review Work Order

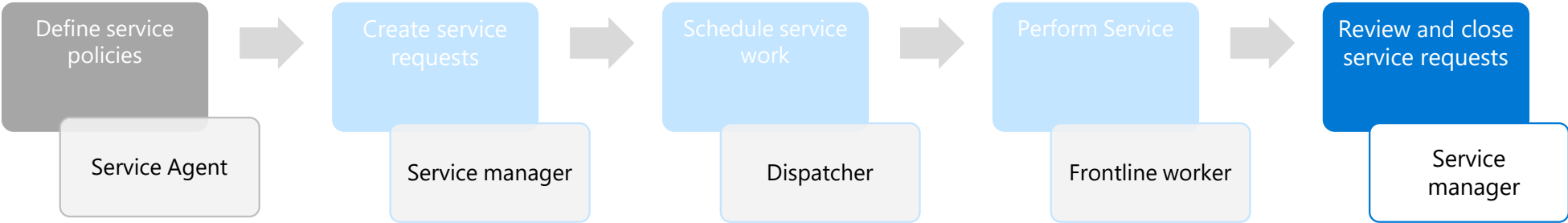
Sabrina Di Bartolomeo

User Story – Review Work Order



A service manager reviews the work order.

This might involve reviewing service tasks and customer feedback, adding any important documents, analyzing performance and updating the status to close and bill the work done.



-
- Home
- Recent
- Pinned
- My Work
- Get Started
- Dashboards
- Scheduling
- Work Orders
- Schedule Board
- Bookings
- Resource Requireme...
- Requirement Groups
- Time Off Requests
- Time Entries
- Customers
- Accounts
- Contacts
- Service Delivery
- Cases
- Agreements
- Insurance
- Warranties
- Assets
- Assets
- Functional Locations
- IoT Alerts
- IoT Devices

Show AsShow ChartNewRefreshVisualize this viewExport to Excel

Share

Work Orders

Edit columnsEdit filtersFilter by keyword

<input type="checkbox"/> Work Order Number	Primary Incident Type	Service Account	System Status	Priority	Booked Resources	Created On
<input type="checkbox"/> 00006	Faulty Washing Machine	A Datum Corporation	Completed	No priority	Jamie Reding	5/28/2024 10:57 AM
<input type="checkbox"/> 00005	Standard Inspection	A Datum Corporation	Scheduled	No priority	Jamie Reding	4/28/2024 2:16 PM
<input type="checkbox"/> 00004	Standard Inspection	Contoso Engineering	Scheduled	High	Jamie Reding	4/28/2024 2:10 PM
<input type="checkbox"/> 00003		Contoso Engineering	Scheduled	Low	Jamie Reding	4/27/2024 6:28 PM

1-4 of 4 (0 selected)

Page 1

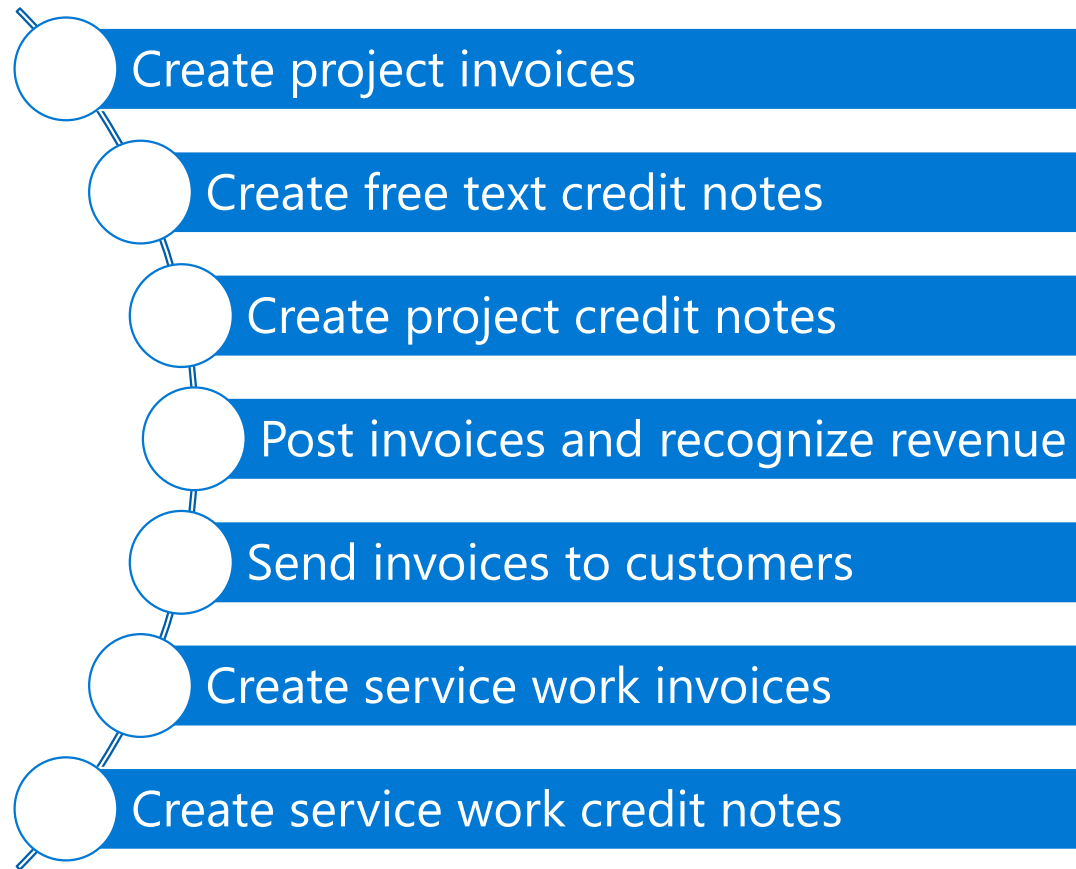
Service to Cash

Invoice customers

Dean Hardy



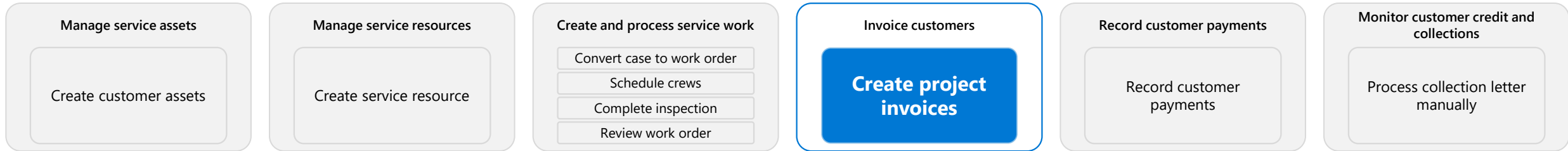
Service to Cash – Invoice customers



User story 7: Create project invoice

Dean Hardy

User Story – Create project invoice



Alicia Thornber, a Controller for Contoso Utilities, wants to create an invoice from product and service line items that were generated when a work order was completed and posted by the field service manager.

←

Save

Save & Close

New

Delete

Refresh

To exit full screen, swipe down from top of screen or press **F11**

Share

00016 - Saved

Work Order - Work Order

00016

5/29/2024 2:04 PM
Created on

V00492
Service account

General

Products and services

Tasks

Reference

Timeline

Related

Details

Status

Posted

Priority

No priority

Service account

V00492

Work order type

Repair

Incident type

Agreement

Summary

Account instructions

Promised window

Time window

Resolution

Timeline notes

F&O Project

000192

Location

Functional location

Service address

456 Peach Bethlehem
Bethlehem PA 18018
US

Copilot

PREVIEW

Generate

There are no active resource requirements on this entity.

Contacts

Reported by

Account contacts are populated from the service account's primary contact

Assets

Primary asset

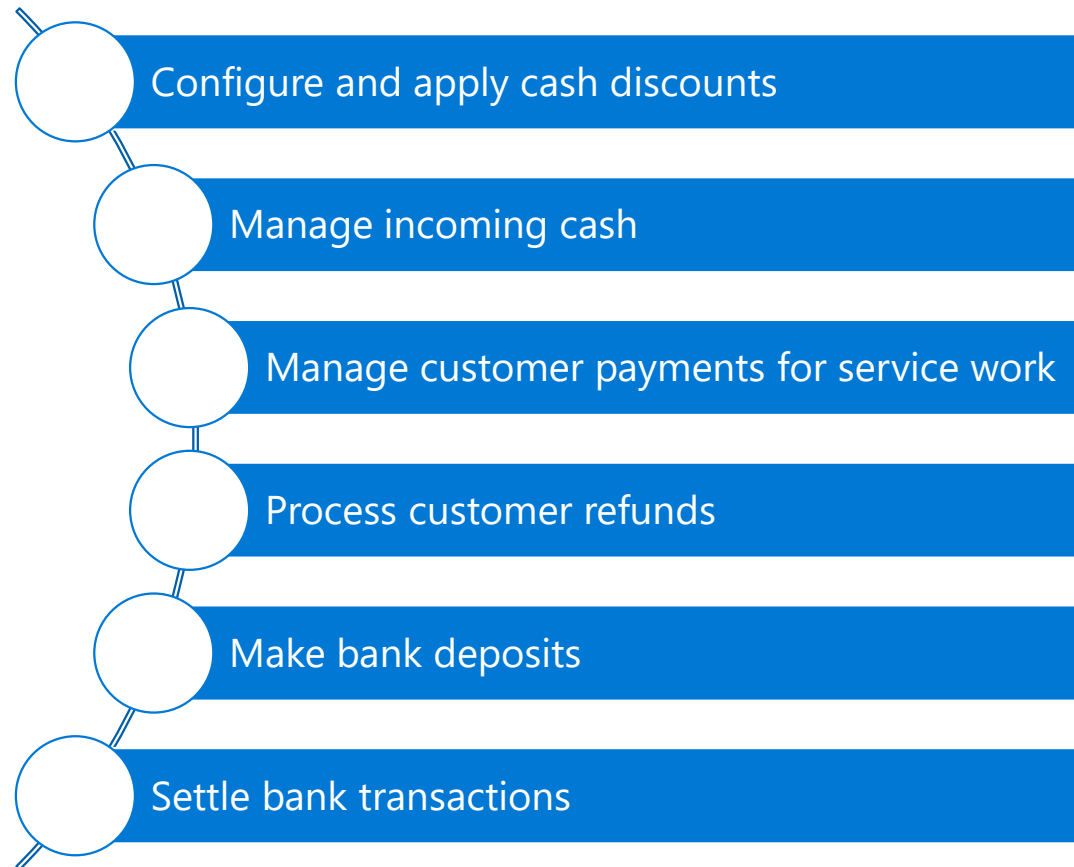
Service to Cash

Record customer payments

Dean Hardy



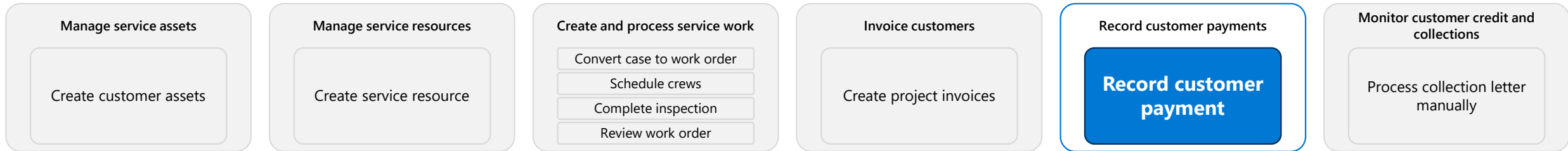
Service to cash – Record customer payments



User story 8: Record customer payment

Dean Hardy

User Story – Record Customer PAyment



Brooke Drynan (Accounts Receivable Clerk) has received a payment from the customer and needs to record it in the finance system

SendViewFunctionsCommissionPosted sales taxChargesTotalsTransactionsVoucherPropertiesOptions

Personalize

Page options

Share

Personalize this page

Security diagnostics

Record info

Get a link

Create a custom alert

Add to workspace

Advanced filter or sort

Go to

Manage my alerts

Filter

000181

5/29/2024

US-023

Invoice journals | 000197-05 : 00016 | Standard view

000181 : 000001

Invoice header

GENERAL	CONTRACT	RELATED INFORMATION	PRINTING OPTIONS	CREDIT NOTE REASON
Invoice	Invoice account	Invoice proposal	Invoice format	Reason code
000181	US-023	000182	Detailed invoice	
Invoice date	Project contract ID	Voucher	MARGIN	Comment
5/29/2024	000001	180000180	Gross margin	
Invoice amount	Sales currency	Payment ID	7.92	
10.00	USD		Contribution ratio	
		Invoice type	79.2	
		Invoice		

Invoice proposal transaction summaries

Project	Project name	Billing rule	Name	Amount invoic...	Invoice line am...	Retention rele...	Retention perc...	Customer retal...	Amount less re...
000197-05	00016			0.00	10.00	0.00	0.00	0.00	10.00

Invoice transactions

Item

Display dimensions

Project date	Project ID	Item number	Activity number	Site	Warehouse	Description	Quantity	Unit price	Line amount	Transaction ID
5/29/2024	000197-05	A0001		1	11	HDMI 6' Cables	1.00	10.00	10.00	000637

FOREIGN TRADE

Shipment batch	Commodity	Country/region of origin	State of origin	Weight
				0.00

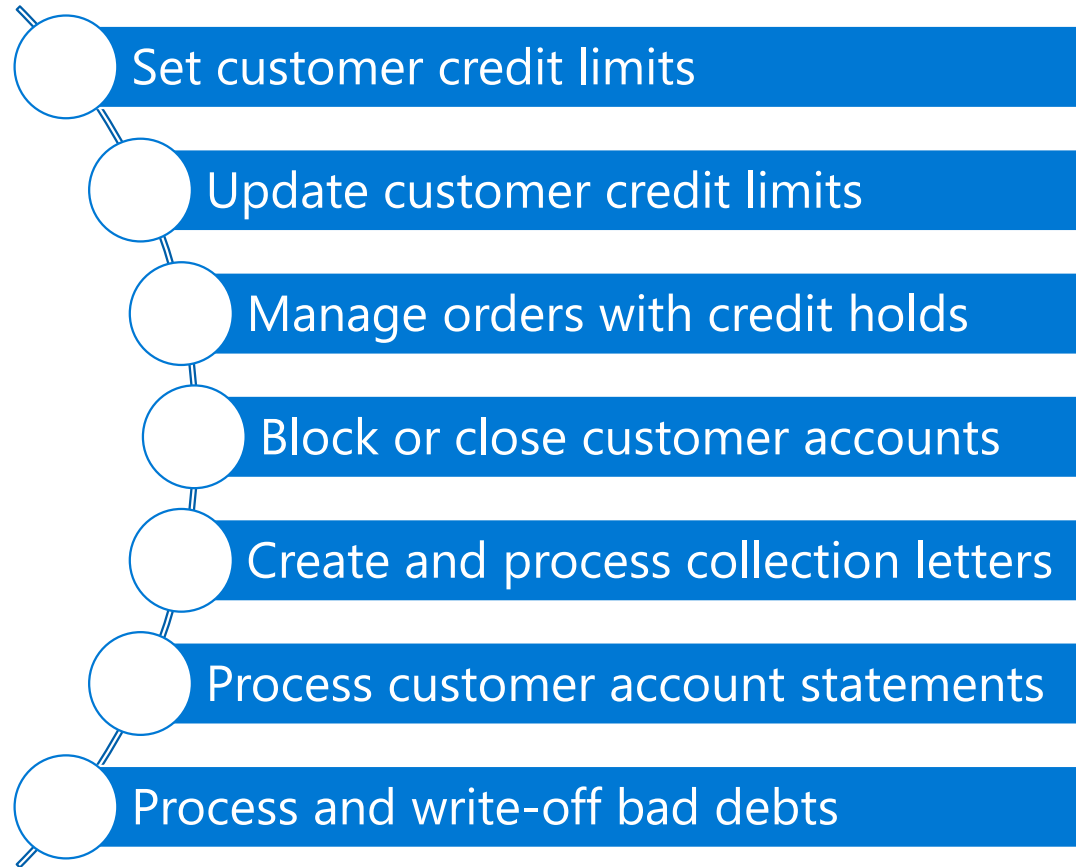
Service to Cash

Monitor customer credit and collections

Dean Hardy



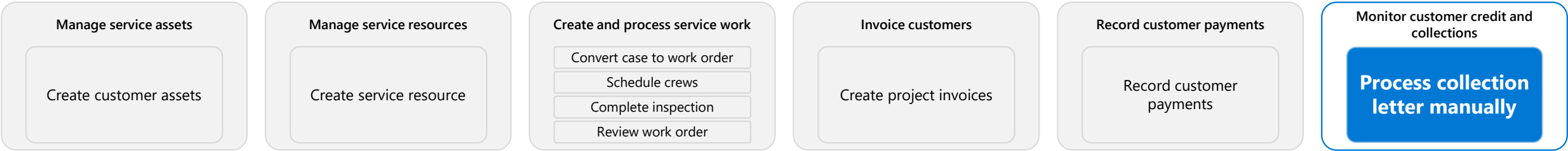
Service to cash – Monitor customer credit & collections



User story 9: Process collection letters manually

Dean Hardy

User Story – Process collection letter manually



April, who is a credit and collections clerk needs to send a collection letter to a customer with overdue invoices.

This use case shows how collection letters can be generated and sent from Dynamics 365 Finance & Operations.



Contoso Entertainment System USA

Search people ...

< May 2024 >

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Work items assigned to me

Work items will be displayed here after they are assigned to you.

To-do list

You're all caught up on your tasks.

APPS

Business performance analytics (preview)

Business performance planning

Copilot for Finance (Preview)

Demand planning

Invoice capture

WORKSPACES

Bank management	Channel merchandising configuration validator	Customer payments	Fixed asset management	Outbound work monitoring	Purchase order confirmation	Supply risk assessment
Benefits	Collections coordinator	Data management	General journal processing	Outbound work planning	Purchase order preparation	System administration
Budget planning	Commerce pricing and discount management	Data validation checklist	Globalization studio	Payment workspace	Purchase order receipt and follow-up	Task management
Business document management	Compensation management	Electronic reporting	Invoicing	Payroll management	Recruitment management	Vendor bidding
Business processes for human resources	Confirmed purchase orders with changes	Employee development	Learning	People	Released product maintenance	Vendor information
Business processes for payroll	Cost accounting ledger administration	Employee self service	Leave and absence	Personnel management	Resource lifecycle management	Vendor invoice automation
Cash overview - all companies	Cost administration	Expense management	Ledger budgets and forecasts	Product readiness for discrete manufacturing	Retail and Commerce IT	Vendor invoice entry
Cash overview - current company	Cost analysis	Feature management	Feature management View the list of new features and enable them Learn more Got it!	Product readiness for process manufacturing	Sales order processing and inquiry	Vendor payments
Catalog management	Cost control	Financial analysis - all companies	Master planning	Product variant model definition	Sales return processing	Warehouse implementation tasks

Resources

Jason du Plessis



Resources

TechTalks

- [Part 1: Introduction to the Dynamics 365 Guidance Hub | November 30, 2023](#)
- [Business Process Catalog and Guidance - Part 2: Introduction to Business Processes | December 14, 2023 \(dynamics.com\)](#)
- [Business Process Catalog and Guidance - Part 3: Using the Business Process Catalog to Manage Project Scope and Estimation | January 11, 2024 \(dynamics.com\)](#)
- [Business Process Catalog and Guidance - Part 4: Authoring Business Processes | January 18, 2024 \(dynamics.com\)](#)
- [Business Process Catalog and Guidance - Part 5: Authoring Business Process Patterns and Use Cases | January 25, 2024 \(dynamics.com\)](#)
- [Business Process Catalog and Guidance - Part 6: Conducting Process-Centric Discovery | March 12, 2024 \(dynamics.com\)](#)
- [Business Process Catalog and Guidance - Part 7: Introduction to Process Governance | March 21, 2024 \(dynamics.com\)](#)

MS Docs

- [Field service overview | Microsoft Learn](#)
- [Service management overview](#)
- [Assets Maintenance requests](#)
- [Accounts receivable overview](#)

Learn

- [Field Service – Training | Microsoft Learn](#)
- [Finance – Training | Microsoft Learn](#)

Community Resources

- [\(20+\) Viva Engage - Dynamics 365 Field Service \(cloud.microsoft\)](#)
- [\(16\) Viva Engage : Dynamics 365 and Power Platform Preview Programs : Field Service Integration : All Conversations \(yammer.com\)](#)
- [\(20+\) Viva Engage - Dynamics 365 Finance and Ops Connected Community \(cloud.microsoft\)](#)

