

Field Service integration with Finance and operations application

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Agenda

- Business and Integration overview
- Application demo
- Integration extensibility
- Implementation best practices
- Resources
- Q&A

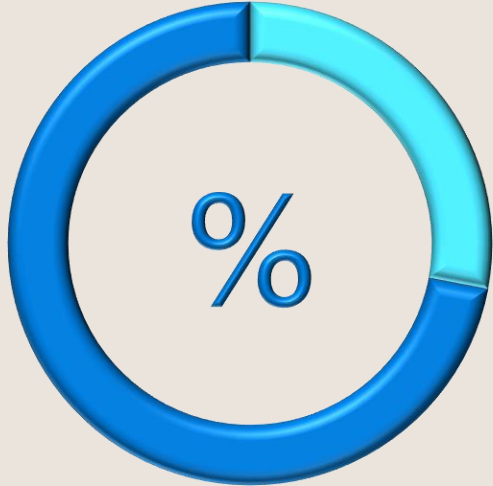
Business and Integration Architecture Overview

Jason Cohen

Why did we integrate with Finance and Operations?

- **Improved Efficiency**
 - Integrating these two solutions it streamlines critical business processes and reduces manual data entry, resulting in increased efficiency.
- **Real-Time Visibility**
 - Customers can gain real-time visibility into their field service operations and financial performance.
- **Enhanced Accuracy and Improved Customer Experience**
 - Integrating these solutions minimizes the risk of errors that can occur when data is manually transferred between systems. Accurate financial records are crucial for compliance, reporting, and overall business health. Additionally, it can enable the field service personal to provide cost estimates, track billing, and address customer inquiries more efficiently, enhancing overall customer satisfaction.

Priorities and Challenges



Customers care about...

- Reduce implementation time, improve time to value, and increase return on investment
- Their service motion having a direct impact on their financial and inventory systems of record
- Seamlessly interconnected front and back-office processes

Microsoft Objectives:

- Fulfilling the promise of our combined Dynamics 365 brand
- Releasing a cost-effective approach for our customers who use both Field Service and F&O

Challenges



Disparate systems for service management and ERP processes



Integration can be time-consuming and costly



Reduced front and back-office efficiency without strong integration

Integration: Dynamics 365 Finance & Operations

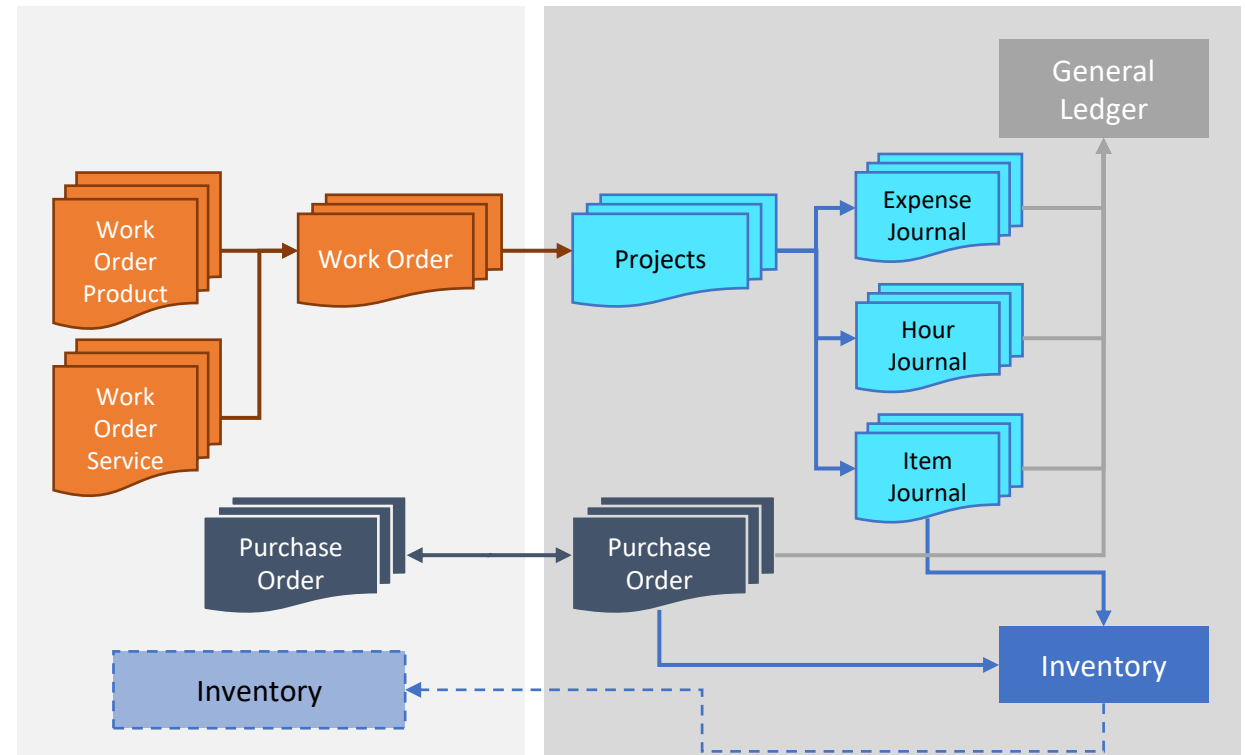
Core Principles:

- **Transactional reliability is everything.**
- **Let FS be FS. Let F&O be F&O.**
- **Use virtual tables to expose data instead of syncing - whenever possible.**
- **Used dual-write to align primary tables that are required to process our transactions.**

As a result....

- **Transactions have status** with automatic and manual retry
- **Primary tables** are dual written
- **Financial transactions** from FS automatically reflected in the F&O General Ledger
- Work Orders align with F&O Projects to unlock the **full financial and inventory** power of F&O
- **Inventory transactions** automatically reflected in the F&O Inventory record, which is exposed directly in FS through virtual tables

Alignment between:
FS Functionality & F&O Core Functionality



Built atop dual-write to create a common understanding for primary tables:
Products, Customers, Contacts, Units of Measure, Currencies, Ship Via, Warehouses, Resources, etc.

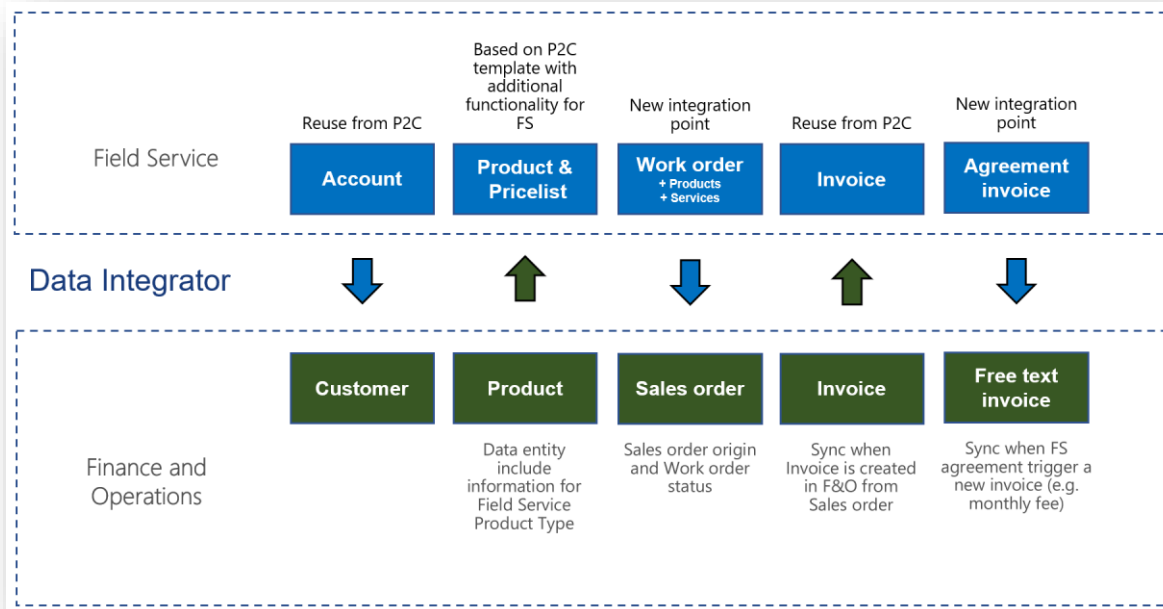
WO Transactions to Journals

FS Transaction	FS Product Configuration	F&O Product/Project Category Configuration	F&O Transaction	Price/Costing Source
WO Product	Product.Field Service Product Type = Inventory	Product.Product Type = Item or Service Product.Item Model Group.Stocked product = Yes	Item Journal & Lines	Pricing set by FS.
	Product.Field Service Product Type = Non-Inventory Product.Project Category.Transaction Type = Expense	Project Category.Transaction Type = Expense	Expense Journal & Lines	Costing/Pricing set by FS.
WO Service	Product.Field Service Product Type = Service Product.Project Category.Transaction Type = Hours	Project Category.Transaction Type = Hours	Hours Journal & Lines	Costing/Pricing set by FS.

Existing Integrations

FS has two existing integrations with the finance and operations applications:

- One uses DW and aligns customer assets, warehouses, and purchase order scenarios ([Integrate Dynamics 365 Field Service and Supply Chain Management - Dynamics 365 Field Service | Microsoft Learn](#))
 - Can be used adjacent to the new integration.



The screenshot shows the 'Dual-write' configuration page in Dynamics 365 Finance and Operations. The page lists various integration points and their status.

Integration Point	Status
Product number identified barcode (msdyn_productbarcodes)	Not running
Product receipt header (msdyn_purchaseorderreceipts)	Running
Product receipt line (msdyn_purchaseorderreceiptproducts)	Running
Product specific unit conversions (msdyn_productspecificunitofmeasureconversions)	Not running
Purchase order headers V2 (msdyn_purchaseorders)	Running
Released products V2 (msdyn_sharedproductdetails)	Not running
Sales invoice headers V2 (invoices)	Not running
Sales invoice lines V2 (invoicedetails)	Not running
Sales order header document attachments (annotations)	Not running

- One is much older, using data integrator to align work orders with sales orders ([Integration with Microsoft Dynamics 365 Field Service overview - Finance & Operations | Dynamics 365 | Microsoft Learn](#))
 - Incompatible with dual-write and the new integration.



Application Demo

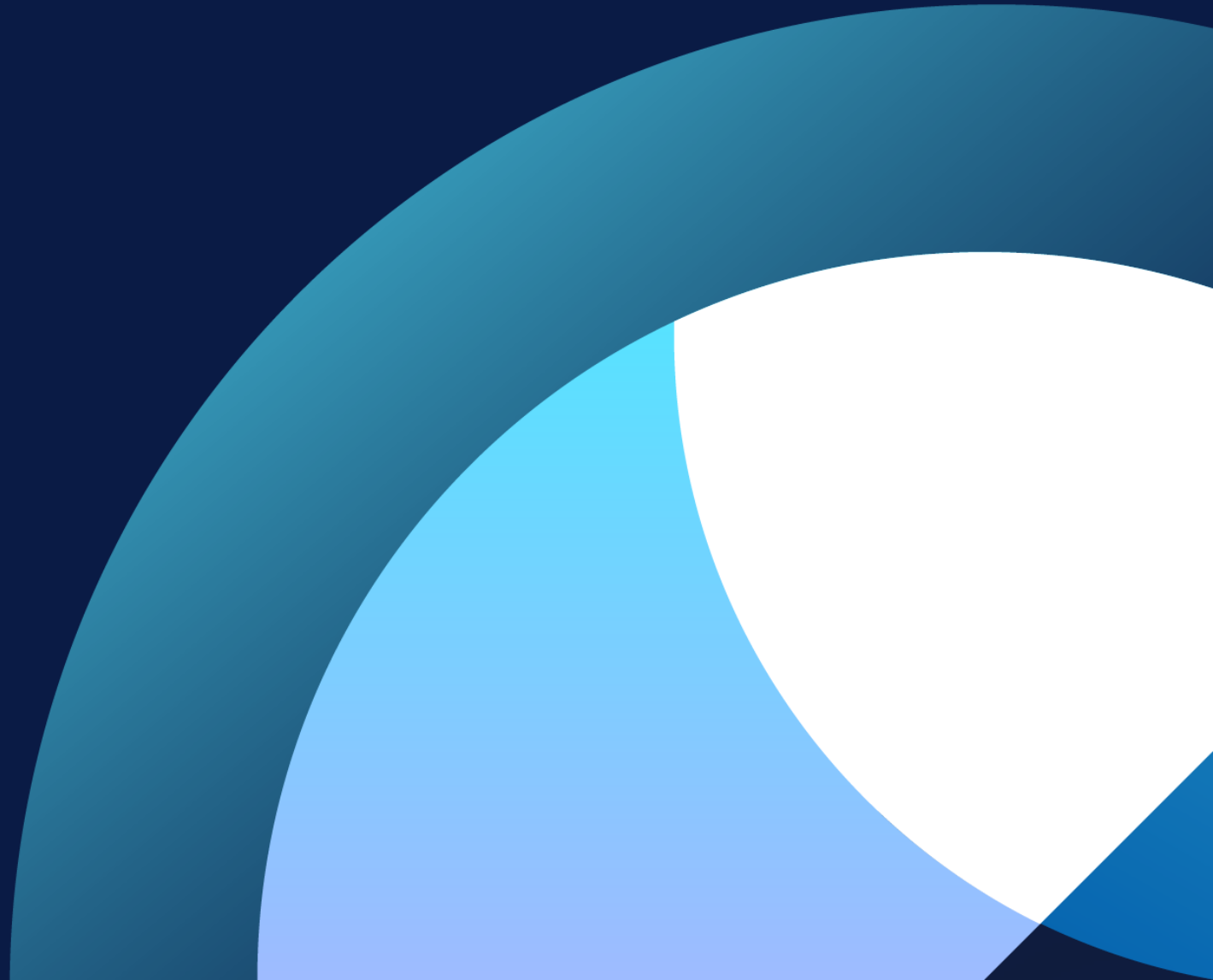
Jason Cohen

Demo: Field Service and Finance & Operations Integration

Jason Cohen

Integration Extensibility

Harsh Birla



Extensibility

Each business is
unique

F&O extension

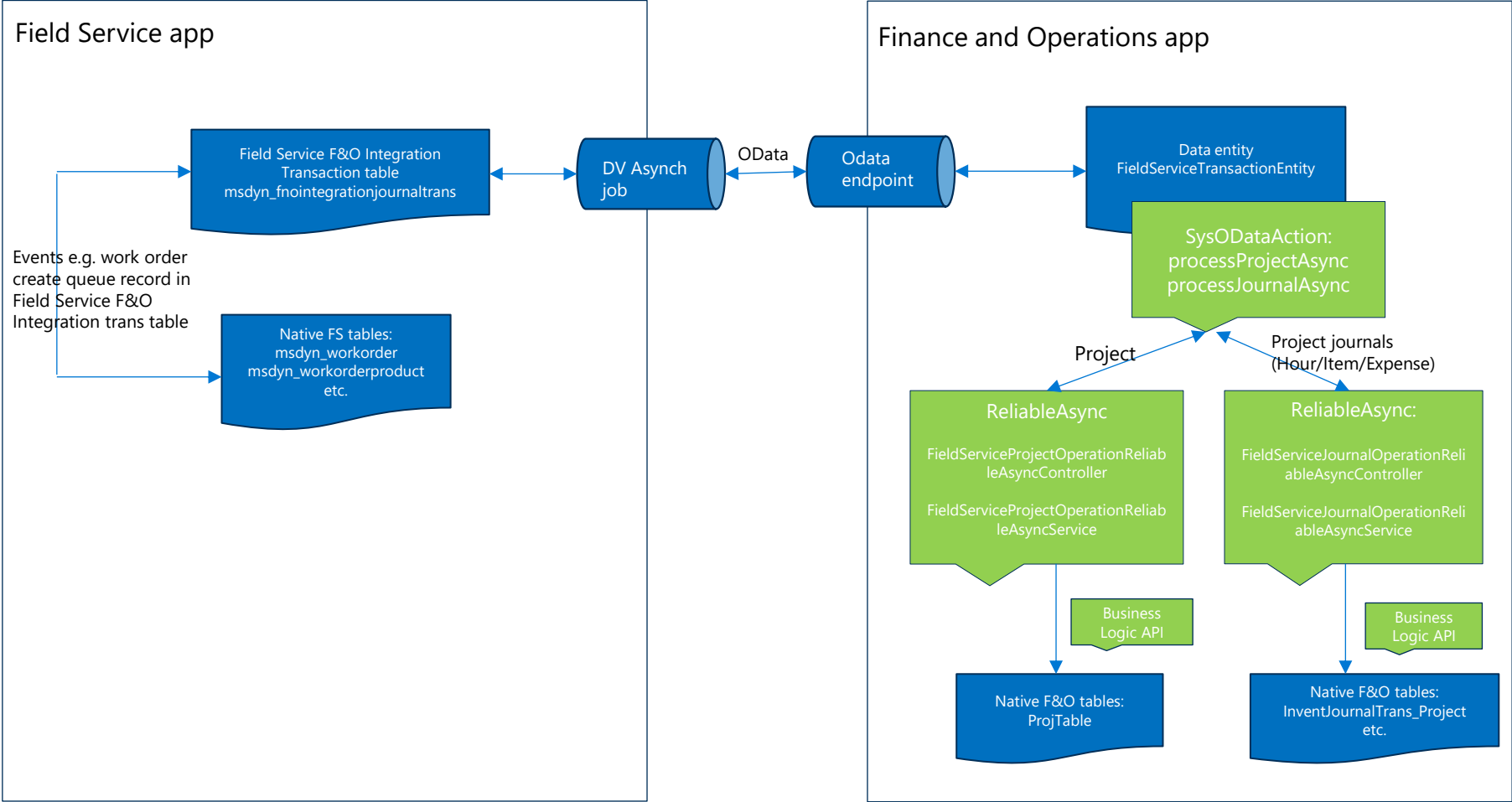
Power platform
Dataverse
extension

Unified
development
environment (UDE)

Application
Lifecycle
Management
(ALM)

Environment
Lifecycle
Management
(ELM)

Underlying technical design



Dual-write & F&O Virtual Entities

Example 1

Consider scenario to add a new custom field in Dynamics 365 Field Service **work order table**, move and store that custom field value to Dynamics 365 F&O through integration in sub-project in F&O.

Example 2

Consider scenario to add a new custom field in Dynamics 365 Field Service **work order product** table, move and store that custom field value to Dynamics 365 F&O through integration in project > item journal in F&O

Example 3

Consider scenario to add a new custom field in Dynamics 365 Field Service **work order product** table, the value of this field needs to come from Dynamics 365 F&O after creating project item journal in F&O. For example, sales tax group is assigned in Dynamics 365 F&O based item setup etc. Once the journal line is created/(and posted), you need to view Sales tax group in Dynamics 365 Field Service work order product table.

GitHub

Sample examples are published at [Dynamics 365 FastTrack Implementation Assets – Field Service integration with F&O Extensibility examples](#)

Implementation Best Practices

Dean Hardy



Integration Best Practices

Dual Write

Category-
based
Transactions

Project
Selection

Worker
Alignment

Security roles

Limitations

Additional Resources

Dean Hardy



Resources

TechTalks

[Unified Admin Experience for Finance and Operations | May 16, 2024 \(dynamics.com\)](#)

[Unified Development Experience for Finance and Operations | May 30, 2024 \(dynamics.com\)](#)

[Unified Dev ALM for Finance and operations | June 27, 2024 \(dynamics.com\)](#)

[Finance and Operations Extensibility | October 26, 2018 - TechTalk \(youtube.com\)](#)

Docs

[Field Service integration with finance and operations applications](#)

[Set up Field Service integration with finance and operations applications](#)

[Enable Dual Write](#)

[Dynamics-365-FastTrack-Implementation-Assets/Integration](#)

Training

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

[Finance – Training | Microsoft Learn](#)

Community Resources

[Viva Engage : Dynamics 365 and Power Platform Preview Programs : Field Service Integration](#)

[Viva Engage - Dynamics 365 Field Service](#)

QUESTIONS



Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria

Děkuji **Tak** Dank u Tänan Kiitos **Merci** Danke Ευχαριστώ A dank

Mahalo ἡΤΙΠ. **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

Thank you!

감사합니다 Paldies Choukrane Aċiū Благодарам ありがとうございます

谢谢 Баярлалаа **Dziękuję** Obrigado Mulțumesc **Спасибо** Ngiyabonga

Ďakujem Tack Nandri Kop khun Teşekkür ederim Дякую Хвала Diolch

Your feedback is essential.

We would appreciate if you would take a moment to complete the brief session evaluation using this QU code or the link in the Meeting Chat.

Thank You!

Dynamics 365 Field Service integration with finance and operations applications



