

COPILOT FOR FIELD SERVICES



USE COPILOT IN THE DYNAMICS 365 FIELD SERVICE WEB APPLICATION – SIDE PANE CHAT

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Agenda

- Business Value
- Enable Copilot in Modern Apps
- Chat with Copilot
- Live demo
- Resources
- Call for Action



Business Value

Why enable “Copilot Side Pane Chat on 365 Field Service web application”?



Copilot is an advanced AI assistant designed to boost your productivity in the Dynamics 365 Field Service web app. You can interact with Copilot through a chat interface in natural language.

- **Summarize work orders:** Copilot provides concise summaries of work orders, saving you time and ensuring you have all the key details at a glance.
- **Update on recent record changes:** Stay informed with real-time updates on any changes to records, helping you stay current and responsive.
- **Preparation for onsite visits:** Copilot assists you in preparing for onsite visits by compiling necessary information and reminders, ensuring you're fully equipped.
- **Answer related queries:** Engage in natural language conversations with Copilot to get quick and accurate answers to any questions related to your tasks.



Enable Copilot in Modern Apps



Prerequisites and Licensing

- As an administrator enable “copilot for model-driven apps feature for your environment”
- Depending where your environment is hosted, you must enable “Move data across regions ”
- Dynamics 365 Field Service License is required to access

Add Copilot for app users in model-driven apps

Power Platform admin center

Environments > ContosoFS > Settings > **Features**

Learn more about [Features](#)

Copilot

[Preview](#)

Enable new AI-powered Copilot features for people who make apps. [Learn more](#)

☒ On

Allow users to analyze data using an AI-powered chat experience in [canvas](#) and [model-driven apps](#). [Learn more](#)
[Requires Copilot licensing](#)

On
Default
Off
On

Insert the Copilot answer component, which allows users to receive an AI-powered answer to a

Copilot for Microsoft 365

Allow data and objects in this environment to be used with Copilot for Microsoft 365. [Learn more](#)

☐ Off

AI Builder

Enable the usage of AI Builder model types that are in preview [Learn more](#)

☒ On

AI prompts

Enable the AI prompts feature in Power Platform and Copilot Studio

☒ On

AI form fill assistance

Allow AI to generate form field suggestions for model-driven apps. By default, this feature will gradually roll out to users. [Learn more](#)



Chat with Copilot

Dynamics 365Field Service

Search

SANDBOXNew look

Copilot

HomeRecentPinnedMy WorkGet StartedDashboardsSchedulingWork OrdersSchedule BoardBookingsResource Require...Requirement Grou...Time Off RequestsTime EntriesCustomersAccountsContactsService DeliveryCasesAgreementsService

<ListIconSaveSave & Close+ NewCalendar BookDeleteRefreshShare

00075 - SavedWork Order · Work Order
GeneralProducts and servicesTasksReferenceTimelineRelated

Details

Status*UnscheduledPriority🔗No priorityService account*Contoso healthWork order type*Contoso HealthIncident type*contoso health_OxygenAgreement---Summary---Account instructions---

Promised window🔗9/18/20248:00 AM

CopilotPREVIEWGenerate

Requirements⌚ 16min durationFind availability

Contacts✓Reported by---
Account contacts are populated from the service account's primary contact

Assets✓Primary asset---

Chat

Hi Contoso User,
Ready to explore? Select one of the suggestions below to get started...

AskWhat are my open leads?

AskWhat are my open opportunities?

AnalyzeWhich opportunities closed in the past 30 days?

You can ask questions about these tables and their records: Insights, Field service historical analytics, Resource duration (preview), Predictive duration (preview),...
[Show more](#)

View Prompts

Ask a question about the data in the app. Use / to reference data
0/500

Make sure AI-generated content is accurate and appropriate before using.
[See terms](#)

Chat with Copilot

Copilot

Chat

Hi Contoso User,
Ready to explore? Select one of the suggestions below to get started...

Analyze
What are the top 10 accounts with the highest revenue?

Analyze
Which opportunities closed in the past 30 days?

Analyze
What leads have closed in the last 30 days?

You can ask questions about these tables and their records: Insights, Field service historical analytics, Resource duration (preview), Predictive duration (preview),...

Show more

View Prompts

Which unscheduled work orders are of high priority?
51/500

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Work Orders - not posted

Edit columns

Edit filters

Filter by keyword

<input type="checkbox"/>	Work Order Number	Primary Incident Type	Service Account	System Status	Pr...	B...	C. ↓
<input type="checkbox"/>	00077		Contoso Energy	Unscheduled	Hi...		9/17/20.
<input type="checkbox"/>	00076		Contoso Banking	Completed	Hi...		9/17/20.
<input type="checkbox"/>	00075	contoso health Oxygen	Contoso health	Unscheduled	Hi...		9/17/20.

What leads have closed in the last 30 days?

You can ask questions about these tables and their records: Insights, Field service historical analytics, Resource duration (preview), Predictive duration (preview),...

Show more

Which unscheduled work orders are of high priority?

The high priority unscheduled work orders are from Contoso Energy and Contoso Health. The work orders were created on 9/17/2024. Top 3 records: Work order "00077" from Contoso Energy created at 10:12:16 AM. Work order "00075" from Contoso Health created at 7:43:22 AM. [Reference](#)

AI-generated content may be incorrect

Chat with Copilot

 View Prompts

What is the estimated products cost in this
WO?

47/500












00075 - Saved

Work Order · Work Order ▾



General Products and services Tasks Reference Timeline Related ▾

Details

Status	*  Unscheduled ▾
Priority	 High ▾
Service account	*  Contoso health × 
Work order type	*  Contoso Health × 
Incident type	*  contoso health Oxygen × 
Agreement	--- 
Summary	---


9/17/2024 7:43 PM
Created on


[Contoso health](#) ▾
Service account

 Copilot **PREVIEW** 

Generate

Requirements

 16min duration

 Find availability

Contacts

Reported by

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

Assets

estimated revenue.?

 Ask

What are my open opportunities?

You can ask questions about these tables and their records: Insights, Field service historical analytics, Resource duration (preview), Predictive duration (preview),...

[Show more](#)

What is the estimated products cost in this WO?

The estimated total cost of products in this work order is \$2500. The top 3 records show different costs for products in this work order.

1. Estimated total cost: \$2500
2. [No more records to summarize]

AI-generated content may be incorrect

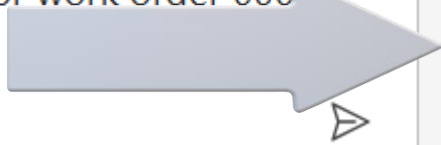


Chat with Copilot

 View Prompts

Who is the technician for work order 00075?

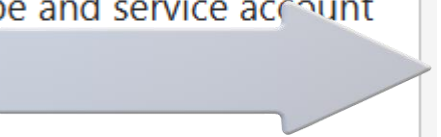
43/500



 View Prompts

What is the incident type and service account for work order 00075?

67/500



Who is the technician for work order 00075?

The technician for work order 00075 is Contoso User. The work order service tasks include: "Get cylinder current capacity", "Disconnect cylinder", and "New cylinder installation". [Reference](#)

AI-generated content may be incorrect



What is the incident type and service account for work order 00075?

The work order 00075 is associated with primary incident type "contoso health Oxygen" and service account "Contoso health". [Reference](#)

AI-generated content may be incorrect





Live Demo



Resources

Resources

Copilot In Field Services

Side Pane Chat

[Use Copilot side chat in D365 Field Service web application](#)

Add Copilot to APPs

[Add Copilot chat for app users in model-driven apps](#)

Field Services

Product documentation

[Dynamics 365 Field Service](#)



Call for Action

Call for action

Embrace Copilot in Field Services as a Core Solution

- View Copilot as essential, not just an add-on.
- Activate Copilot Feature incrementally and discover business advantages

Feedback is needed

- Please don't keep the feedback to yourself. Share it with us instead.

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria
Děkuji **Tak** Dank u Tänan Kiitos **Merci** Danke Ευχαριστώ A dank
Mahalo ἰτι. **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

Thank you!

감사합니다 Paldies Choukrane Ačiū 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