



TECH FALCON
Member of Lootah Holding

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**BENEFITS OF
IMPLEMENTING
DYNAMICS 365
FIELD SERVICE
MOBILE APP**



ASSIGN RESOURCE SECURITY ROLE



Dynamics 365 for Field Service is the ideal tool for keeping track of all of your field service operations. It enables you to effectively manage a large mobile workforce and deliver items and services to customers' doorsteps. Dynamics 365 offers field service management in mobile apps, which makes it much more efficient to process. It makes sure that your frontline workers are assigned appropriate security roles so that they can have access to all the required credentials at their fingertips. Microsoft Dynamics 365 comes with a set of preset security roles, each of which is a collection of privileges grouped together to simplify security management. The ability to create, read, write, remove, and share records of a certain entity type is defined by the majority of privileges. Each privilege also specifies how broadly it applies: to individual users, business units, the entire business unit hierarchy, or the entire organization.



BUILD OFFLINE PROFILES

When working in remote locations, frontline workers have to struggle for internet access, Dynamics 365 has kept it in mind to make your operations easier not just online, by with offline profiles too. With offline capabilities, all important data is downloaded in the device and any updates made by frontline workers are stored locally on the device and synced to the server when the internet connection is restored. Using downloaded data is substantially faster than accessing data from a server via the internet, resulting in improved overall performance. Create an offline profile and then populate it with people and teams.

DON'T REMOVE DEFAULT IDENTITIES:

These default entities were provided on purpose to guarantee that the frontline worker had access to the correct data. Instead of eliminating entities you don't require, concentrate on adding them to the offline profile.

USE OFFLINE PROFILES:

Use offline profiles as foundation for your custom entities. Default entities can still receive updates over time if they work within the given profile.

USE OFFLINE JAVASCRIPT:

To run workflows and sync offline data on the device without internet connectivity, use offline JavaScript. Power Automate flows, on the other hand, only execute when the device is connected to the internet or when the next sync occurs.



USE FORMS AND CONTROLS

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ENHANCE CUSTOMER COMMUNICATIONS

Customers are at the core of every contact with Dynamics 365 for Field Service. Customers have a complete view of their cases thanks to the highly interactive customer portal and connectivity with powerful APIs. Log into your field service portal and look at the KPIs to see what's going on with clients in real-time. Get a 360-degree picture of your consumers and total organizational alignment between your sales, marketing, and field service teams. Give consumers the visibility and data they need into service requests and their status. Enhance the customer experience by providing them with self-service alternatives that are personalized to their needs. Customers should be able to see a live map and a photo of the technician en route. You will be able to notify them of a rescheduled or canceled appointment through text or email.

