

Microsoft Dynamics 365
Business Central
integration with Field Service



Bridging the gap between **Field Service** and ERP systems

The division between Field Service and Enterprise Resource Planning (ERP) systems **has long presented significant challenges, including:**

- Lack of financial visibility
- Inefficient scheduling
- Delayed invoicing
- Data inconsistencies
- Costly and slow integrations



Field Service benefits

Financial



346%

Productivity gain with less than 6 months payback¹

Productivity



40%

Productivity increase for dispatchers and 14% increase for technicians¹

Efficiency



100

Hours saved by more efficient management with 12% less second visits

Administrative



\$2.8m

Interest savings from faster invoicing² and \$829K in savings from retiring old systems³

¹Productivity gains realized after Dynamics 365 Field Service is fully implemented. ²Interest savings are from accounts receivable. ³Savings from reduced licensing costs. Source: "The Total Economic Impact™ of Microsoft Dynamics 365 Field Service," a commissioned study conducted by Forrester Consulting on behalf of Microsoft, December 2023. All quantified monetary benefits represent the three-year, risk-adjusted present value for a composite organization based on customer interviews.

With the Dynamics 365 Business Central and Field Service integration you can:



Streamline operations and improve efficiency



Reduce inventory costs, improve service and invoicing



Maintain product and resource information consistency



Reduce integration implementation costs

The integration between Business Central and Field Service provides



Real-time visibility

Through comprehensive integration from front-line operations to back-office functions, organizations gain immediate visibility into all aspects of their operations



Improved scheduling

With Copilot-assisted scheduling in Field Service dispatchers can match the right technician to the right job at the right time



Streamlined financial operations

Automated billing and invoicing not only accelerate the payment cycle, improving cash flow management, but also reduce errors, enhancing overall profitability, and transforming every work order into an opportunity for growth



Empowered frontline workers

Access to a modern mobile app empowers frontline workers to see their work on the go, access it offline, and make updates while on the job – providing more accurate data for the back office



Fast and cost-effective integration

This out-of-the-box integration reduces the cost and time associated with traditional integrations, leading to quicker time to value and less ongoing maintenance cost

Dynamics 365 Business Central

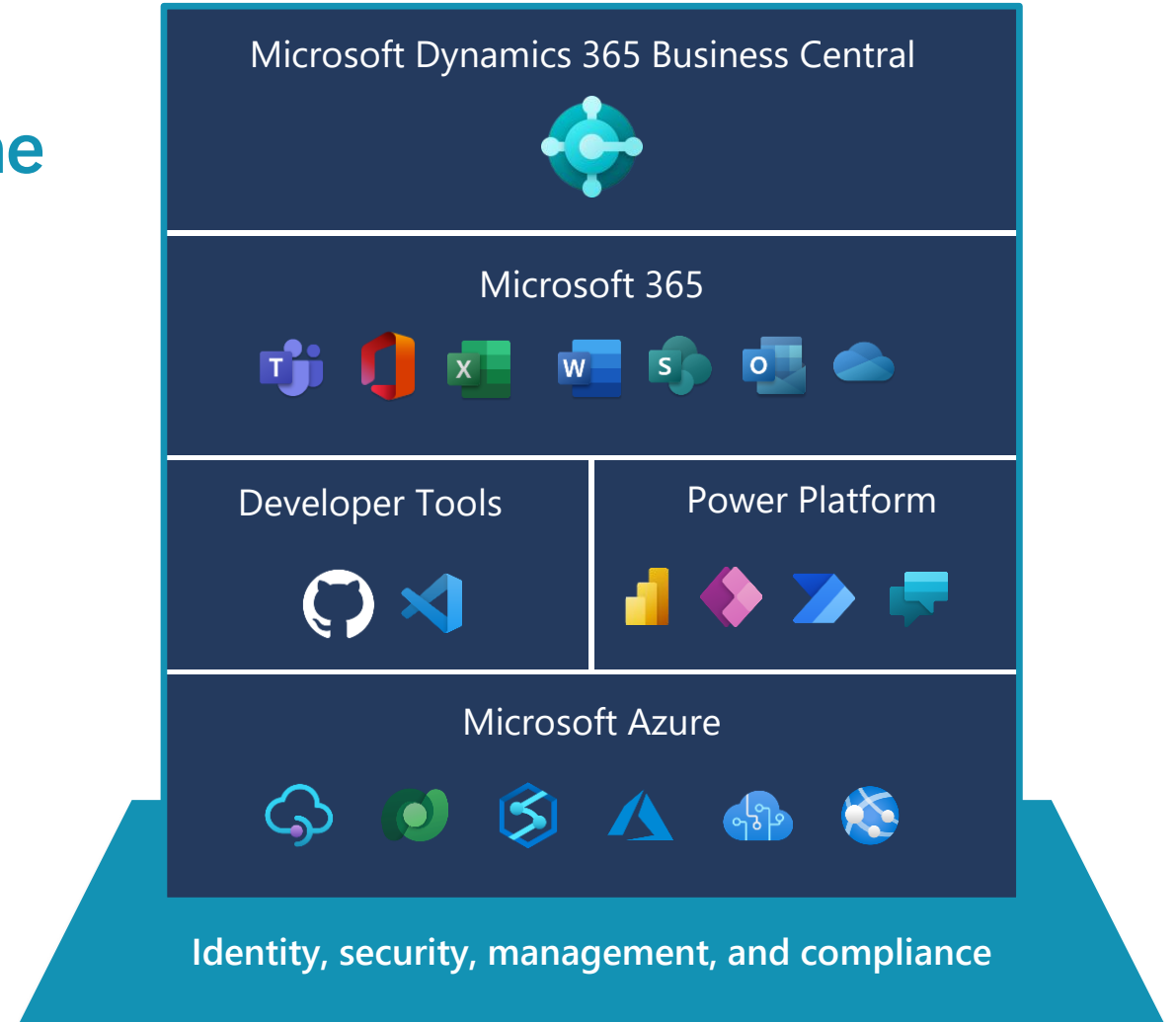
Connect finance, sales, service, and operations teams with a comprehensive business management solution trusted by **over 40,000 small and medium-sized businesses.**



Named **“the Best ERP System”** in 2024 by Forbes Advisor

Dynamics 365 Business Central outcompetes with the only fully integrated stack, on the world's most trusted and comprehensive cloud

- Works seamlessly with the Microsoft applications you already use and know – Outlook, Teams, Excel and Power Platform
- AI infused throughout the solution brings you continuous insights to speed decision making
- A single system that works across international locations
- Scalable and extensible to grow and adapt with your growing business



Business Central Differentiation: reliability, performance, and scale

The best cloud platform for ERP



Performance and Scale



Security

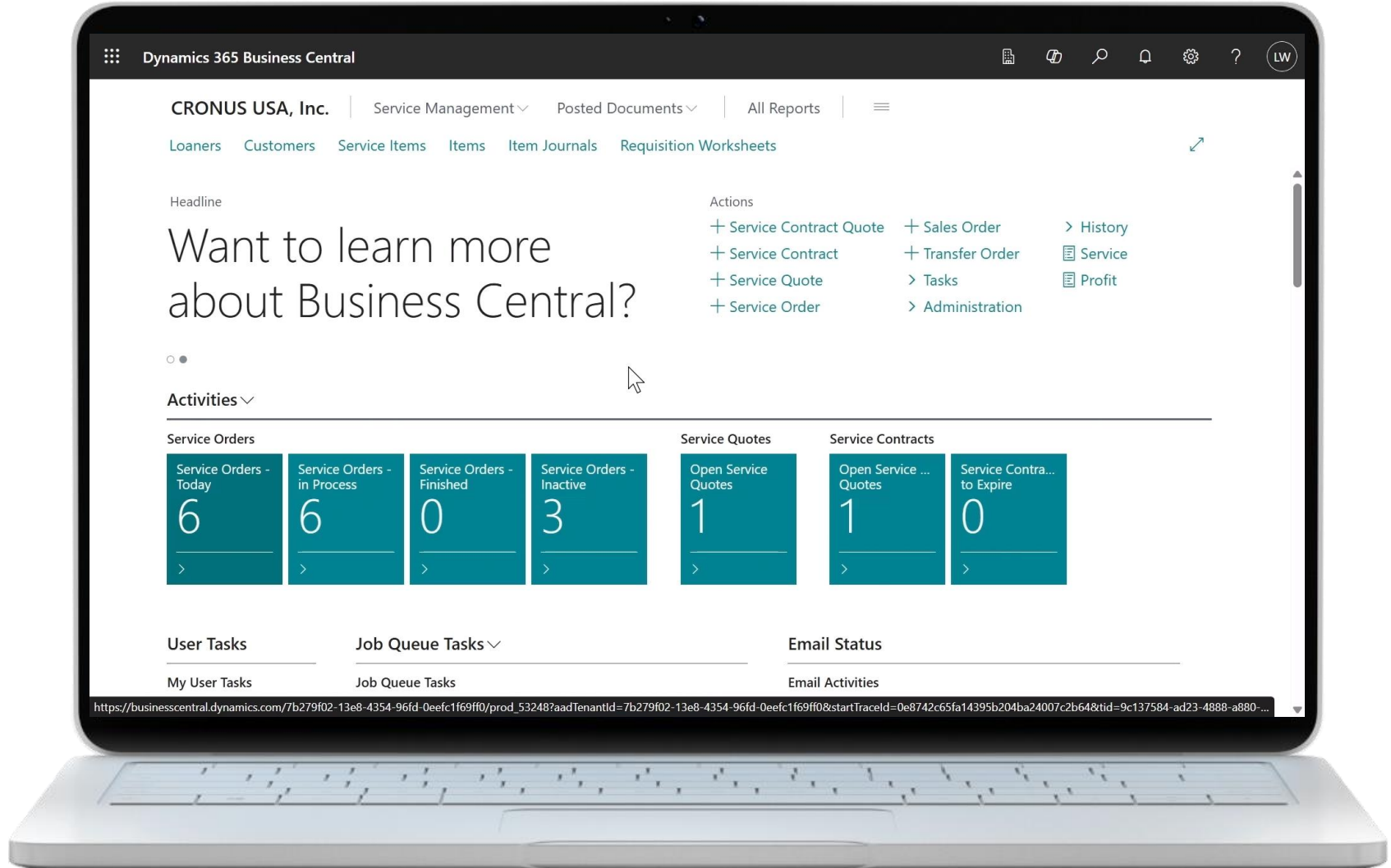


Business Continuity
and Disaster Recovery



Compliance

Microsoft Dynamics 365 Business Central and Field Service



Business Central and Field Service integration capabilities

Create new opportunities to **improve efficiency, customer satisfaction, and growth** by integrating Dynamics 365 Field Service and Business Central

Data synchronization

- Connect one or more Business Central companies with Field Service
- Bi-directional synchronization of items/products, resources/bookable resources, locations/warehouses
- Synchronization of inventory levels and view Business Central item availability in Field Service

Resource and inventory management

- Visually schedule Business Central resources in Field Service
- Inventory availability in Field Service

Work order and service management

- Easy setup integration with service and project Management
- Service, project task and work order alignment
- Account for executed work order consumption of products and services in Business Central
- Consumption and invoicing of work orders

Invoicing and Compliance

- Issue accurate and tax compliant invoice for work executed on work order in Business Central based on data from Field Service

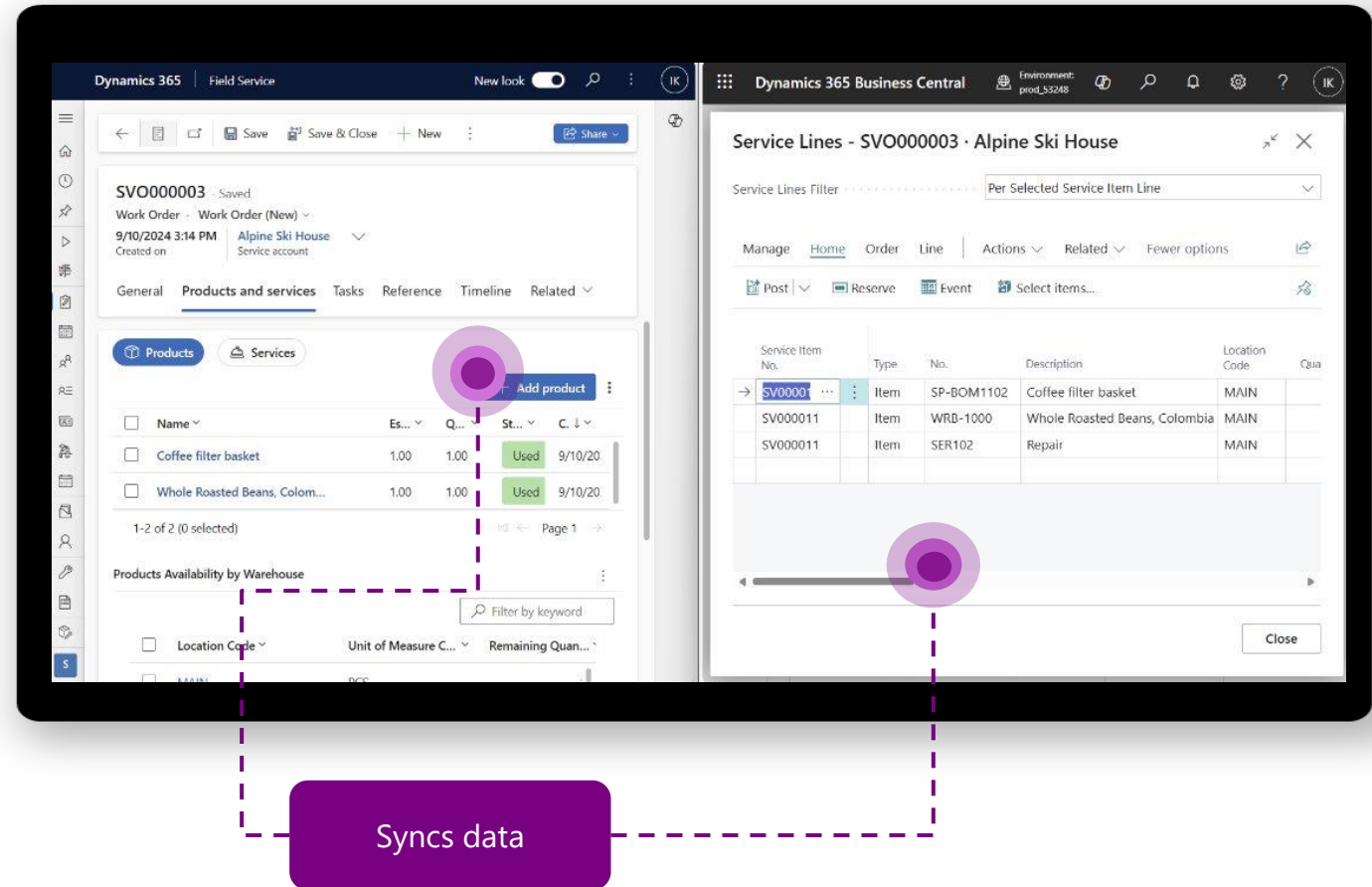
Service and Work Order alignment

Seamlessly integrated solution to benefit your workers

Bidirectional synchronization of service orders and work orders

Service item lines aligned with work order incidents

Service lines aligned with work order products and services



Inventory availability in Field Service

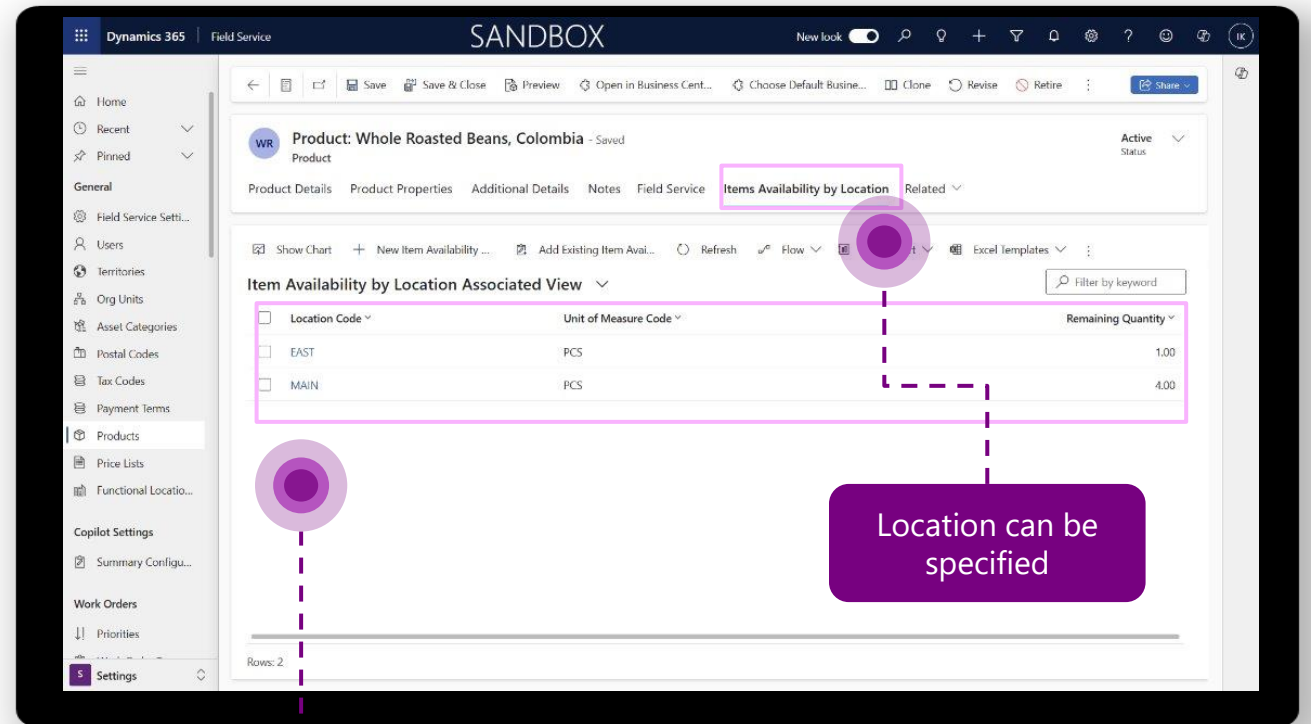
Optimize work order scheduling, service, and purchasing operations.

Location to warehouse mapping

- Unidirectional synchronization
- Excludes in-transit locations
- Excludes locations with warehouse pick mandatory

New item availability by location API

New synthetic relation added between products and item availability



Shows available inventory



Dynamics 365 Copilot

A new era of AI in field service is here

Copilot works alongside your frontline to...

Streamline work order creation

Optimize technician scheduling

Accelerate responses to customers

Suggest next steps with intelligent recaps

Make frontline's work more effortless and collaborative

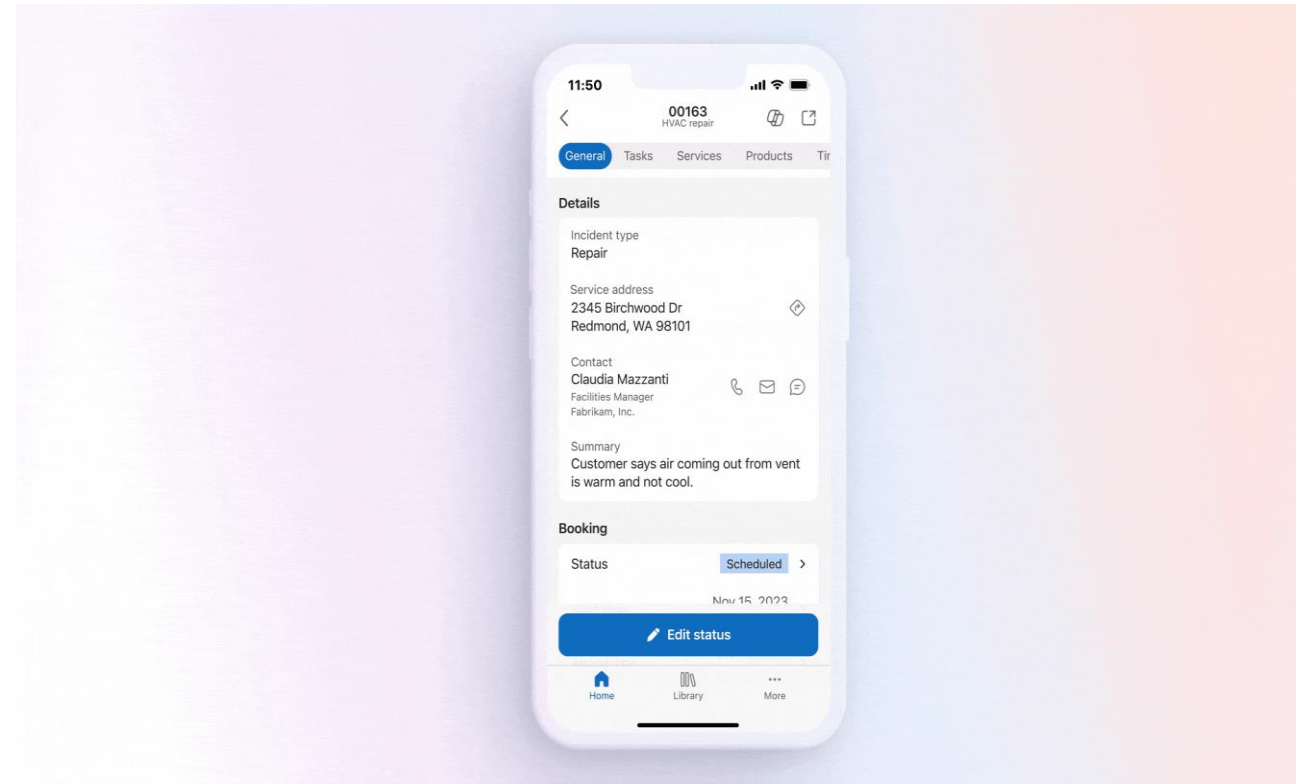
Boost technician productivity with Copilot in D365 Field Service mobile

Quickly receive a summary of key points in a work order

Swiftly make progress updates by speaking to Copilot in natural language and describing the completed task

Copilot will accelerate data entry by providing suggestions to efficiently check off service tasks

Work in Teams integration with Copilot



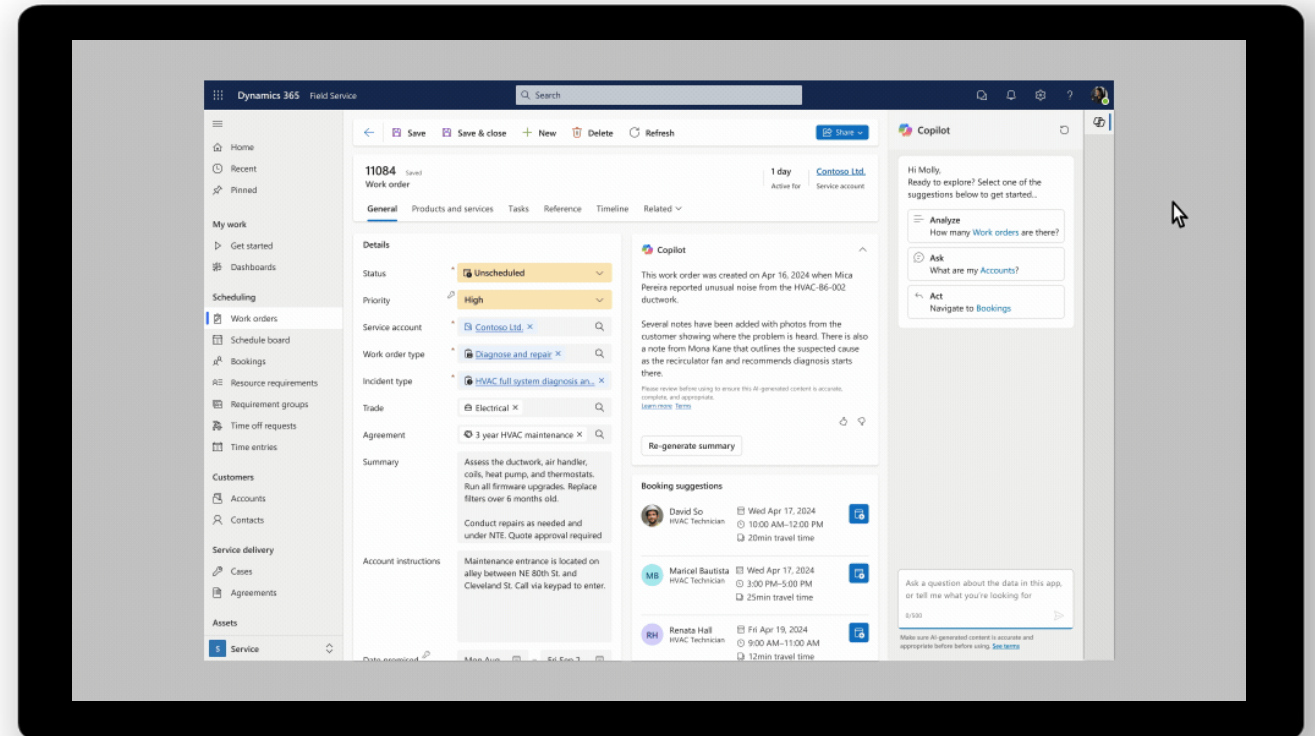
Streamlining work order management with Copilot

Interact with Copilot about work orders using natural language

Copilot assists in retrieving work order details, summarizes and presents them

You can ask Copilot to help creating work orders based on customer emails and scheduling them

Copilot can also draft email updates to customers recapping details of scheduled work orders or suggesting next steps



Why Dynamics 365 Field Service with Business Central?

"We create value when we are with our customers. Customers do not experience the value of our order processing – they only experience value when we solve a problem in their company.

We perform many thousands of service tasks a year, so we spend many hours on planning and order processing. Therefore, it is important for us to streamline these tasks."

Claus Torbøl, CEO Guldager





I was excited to integrate Dynamics 365 Field Service with Dynamics 365 Business Central as it is essential for our operational efficiency. The interface runs smoothly and seamlessly, enhancing our workflow and collaboration.

Hannes Feichtenschlager

IT manager, Stangl Reinigungstechnik GmbH



Let's get started

- Download and install the [Field Service Integration app from AppSource](#)
- Learn more about the integration [on the blog](#)
- Explore the Dynamics 365 [Field Service webpage](#)
- Watch integration videos on [YouTube](#)



Thank you

