



DYNAMICS 365 FIELD SERVICE LICENSING

Field Service connects and empowers people who're constantly out-and-about.

Using deep data insights and tool integration, Field Service can help your clients' sales reps, merchandisers, technicians, and brand ambassadors to offer their customers more proactive, personal services.

Field Service is licensed per user and/or device.

Licenses include the latest version of Field Service Mobile. Not to be confused with Dynamics 365 Mobile Client, this is an exclusive Microsoft product specifically designed for Field Service.

When you license Field Service, you also get 2,000 Customer Voice responses per tenant per month. Additional response packs (in packs of 1,000 responses/tenant/month) can be purchased as required.

FIELD SERVICE USE RIGHTS

USE RIGHTS	TEAM MEMBERS	FIELD SERVICE
Access		
Dynamics 365 for Outlook and Dynamics 365 App for Outlook	●	●
Dynamics 365 Mobile Client Application	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●
Microsoft Dynamics 365 Web application	●	●
Read		
All Dynamics 365 application data	●	●
Custom table data	●	●
Tables: Create, Update, Delete		
Accounts		●
Activities	●	●
Announcements	●	●
Calendar: Share	●	●
Cases for Field Service: Create cases with limited edit capability. No case SLAs, entitlements, or case routing. Users only licensed with Field Service license cannot act as customer service agents and resolve cases		●
Contacts	●	●
Custom Tables	15 max	●
Customer Assets		●
Dispatch		●
Inventory Management		●
Invoices		●
Leads (create only)		●
Notes	●	●
Opportunities		●
Orders		●
Personal Views	●	●
Product		●
Product Families/Hierarchies		●
Product Relationships		●
Purchase Orders		●
Quotes		●
Repairs and Returns Management		●
Resources		●
Routing Capabilities		●
Saved Views	●	●
Schedule		●
Service Agreements		●
Territories		●
Work Hours		●
Work Order Management	●	●
Tables: Actions		
Activity Feeds: Post & follow activity feeds	●	●
Add or remove a connection (stakeholder, sales team) for an account or contact	●	●
Business units: define and configure		●
Chat with support team (as chat client for self-service, requires; third party solution)	●	●
Dialog: start dialog	●	●
Entitlements: manage		●
Field Service Mobile application		●
Field Service Mobile application Offline sync: use		●
Knowledge base: create, update, publish, configure		●
Mail merge: perform mail merge	●	●
Marketing list: associate a marketing list with an account or contact	●	●
Open project position: apply for open project position for Project Operations	●	●
Queue: use a queue item	●	●
Repairs: create and manage (RMA)		●
Resource competencies: update own resource competencies for Project Operations	●	●
Resource Schedule Optimisation: manage		●
Resources (facilities, equipment, people): manage		●
Resources: define and configure		●
Returns: create and manage returns (RTV)		●
Schedule & dispatch capabilities: use scheduling assistant, drag & drop assignment, update resource bookings		●
Schedule board: configure and view		●
Services: define and configure		●
SLA: manage		●
Teams: define and configure		●
Work hours: define and configure		●
Work hours: manage		●
Yammer: use Yammer collaboration (requires the appropriate license; acquired separately)	●	●
General System Use: Actions		
Auditing: configure		●
Business Processes: customise		●
Create and update custom reports, charts, and dashboards		●
Customise and extend out of the box reports, charts, and dashboards		●
Dialogs: define and configure		●
Duplicate Detection: configure rules		●
Dynamics 365 Forms, Tables, and Fields: create		●
Email: create, update, and delete templates	●	●
Forms and Views: customise		●
Import Data in Bulk		●
Microsoft Excel: export data to Excel	●	●
Queue: define and configure		●
Records: use relationships and connections between records	●	●
Search and Advanced Find: use	●	●
Tables: define connections and relationships between tables		●
Word: create, update, and delete templates	●	●
Workflows: define and configure		●
Additional Services and Software		
Dynamics 365 Customer Voice		●
Dynamics 365 Mobile Offline Capabilities		●
Project Operations Team Members App	●	●



ADDITIONAL FIELD SERVICE CAPABILITIES

Dynamics 365 Field Service Resource Schedule Optimisation

Resource Scheduling Optimisation is an optional add-in for Field Service. It gives end users the ability to automatically create schedules for their resources. Ideal for use with both human and non-human assets, it also enables appointments to be optimised for travel time, mileage, and other constraints.

Resource Schedule Optimisation is licensed per resource. It's typically used by schedulers or dispatchers with a Field Service user license.

Schedule Optimisation can be used as much as the licence holder needs, either on a regular basis or ad-hoc.

If you have any questions around licensing, please contact:

The Dynamics Team

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