

A stylized logo graphic consisting of a dark blue chevron pointing right, with a white line forming a square shape inside the chevron's path, and a long white line extending from the right side of the square.

STONERIDGE CONNECT

2017 Client Conference



Dynamics 365 for Field Service



About the Speaker

Dan Leeman

CRM Consultant

Total Industry Experience: 3 years

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<https://stoneridgesoftware.com/team/dan-leeman/>

Tues Fri Sat

7 Soccer
game

Dance(N)

10 am - BAC

Rehearsal

12⁰⁰ pm - Dance

715-915

445-700

5 pm - Float

Wed Ballet

515-815 Ballet

1 pm Soccer
Game

430-730 Ballet

Thurs

7-9 Ballet

The Opportunity

52% of companies are still using manual methods to handle field service.

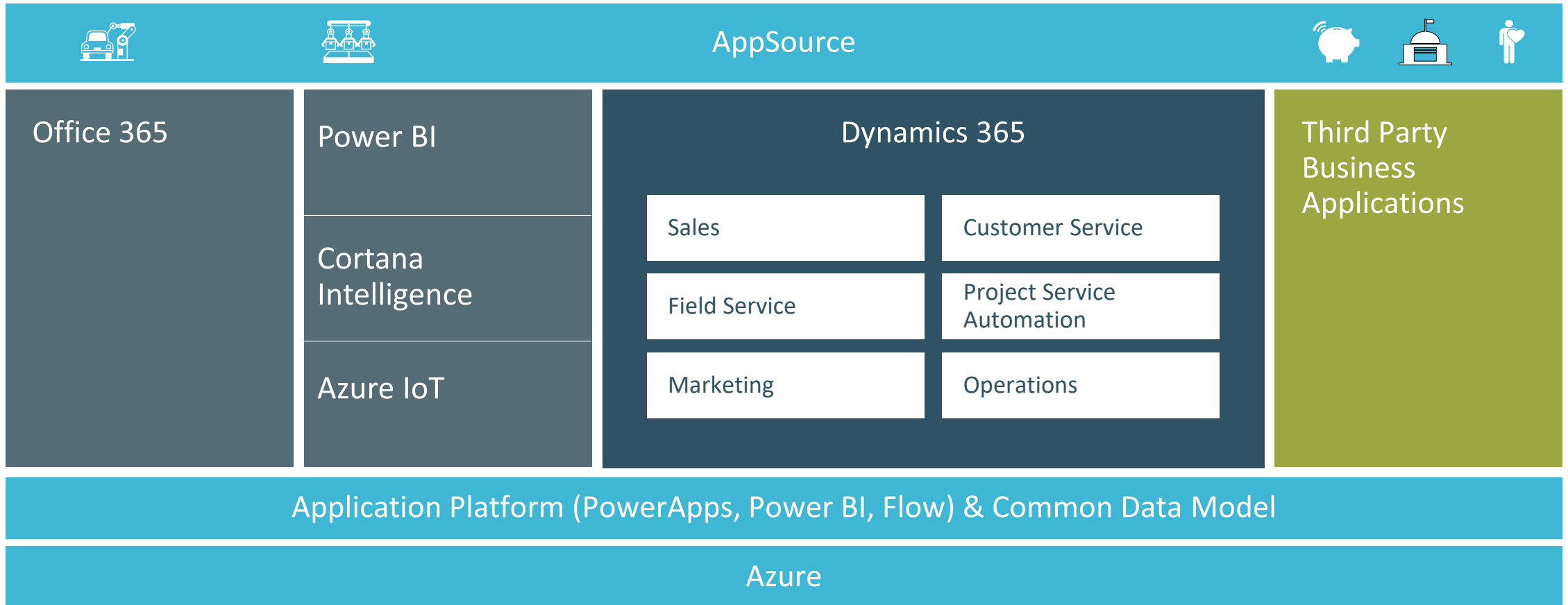
45% of service agents are frustrated with speed of current tools

38% of service agents are frustrated with lack of access to information

Who should use Field Service?

- Focused on service
 - Installation
 - Diagnostics
 - Maintenance
 - Repair
- Employees who travel to customer sites
- Schedule and dispatch person or team

Microsoft Business Cloud



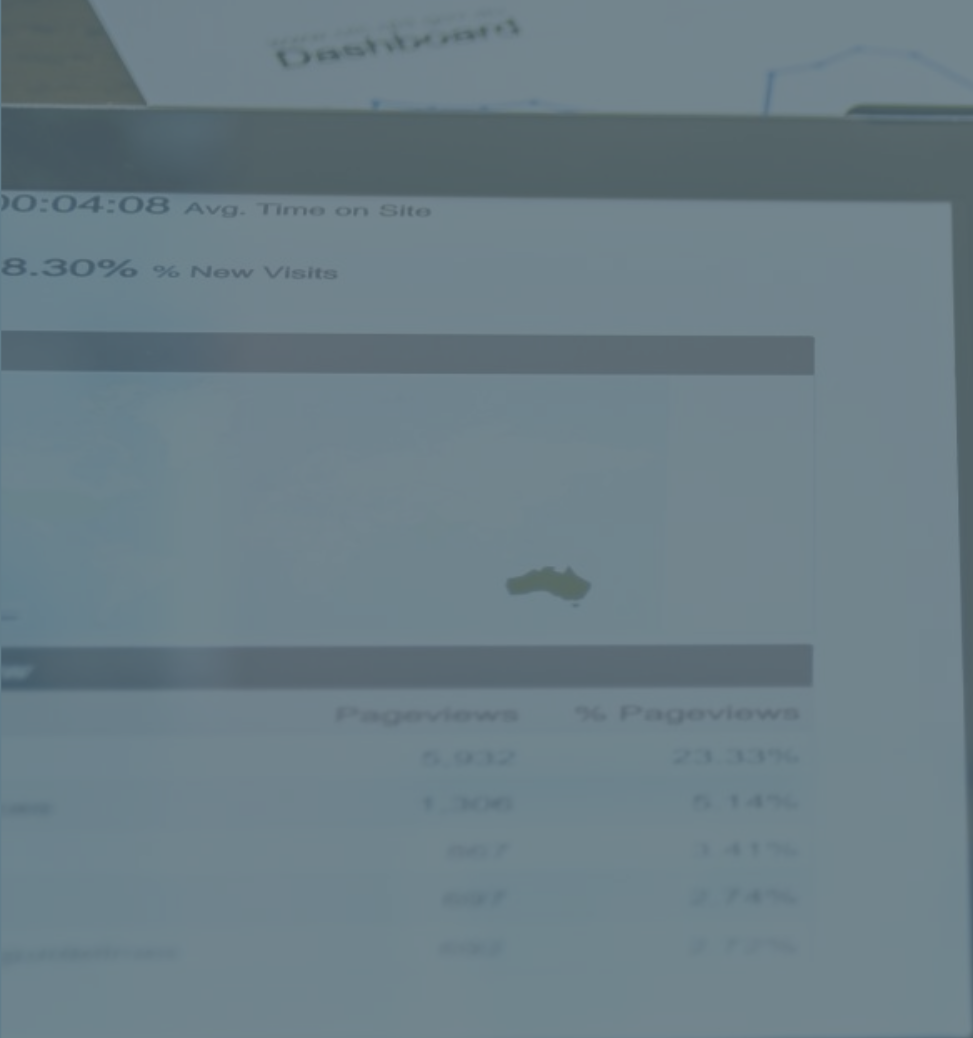


Dispatcher

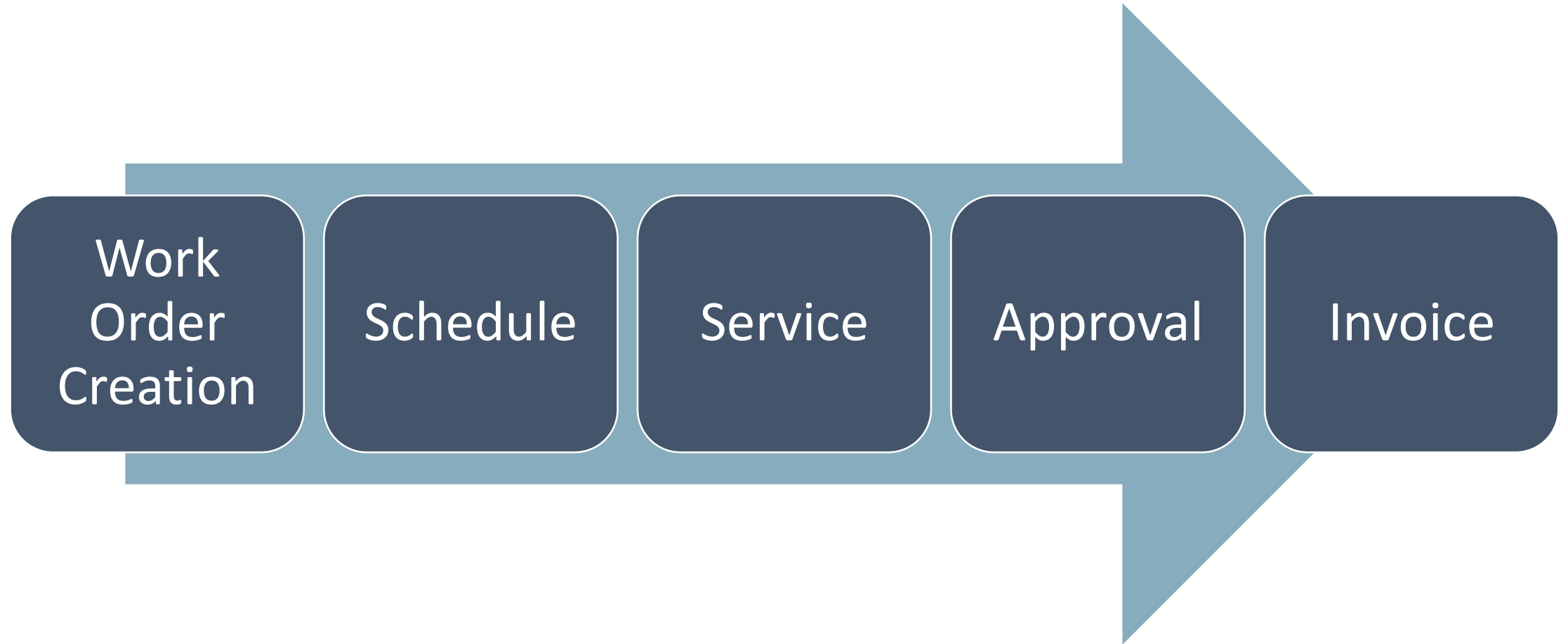
Technician



Management

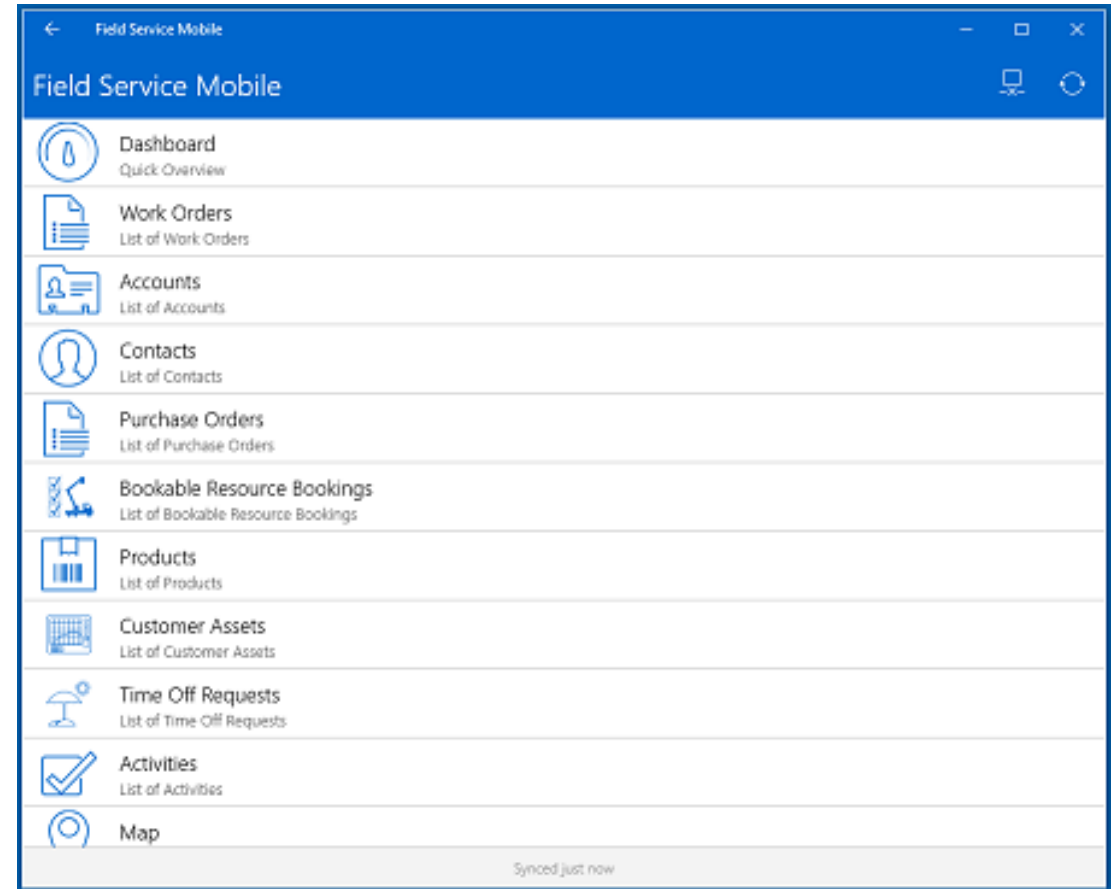


Field Service Process

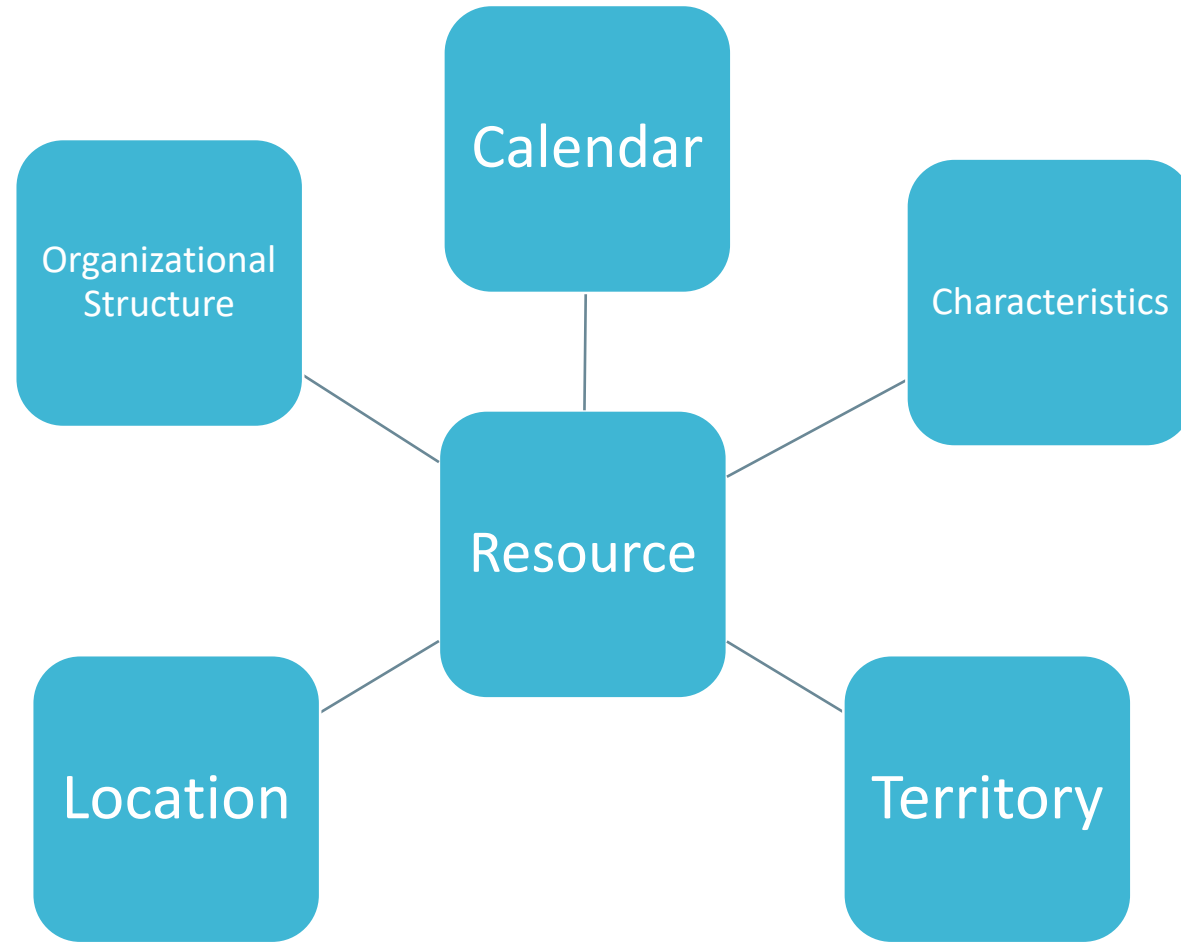


Resource Types

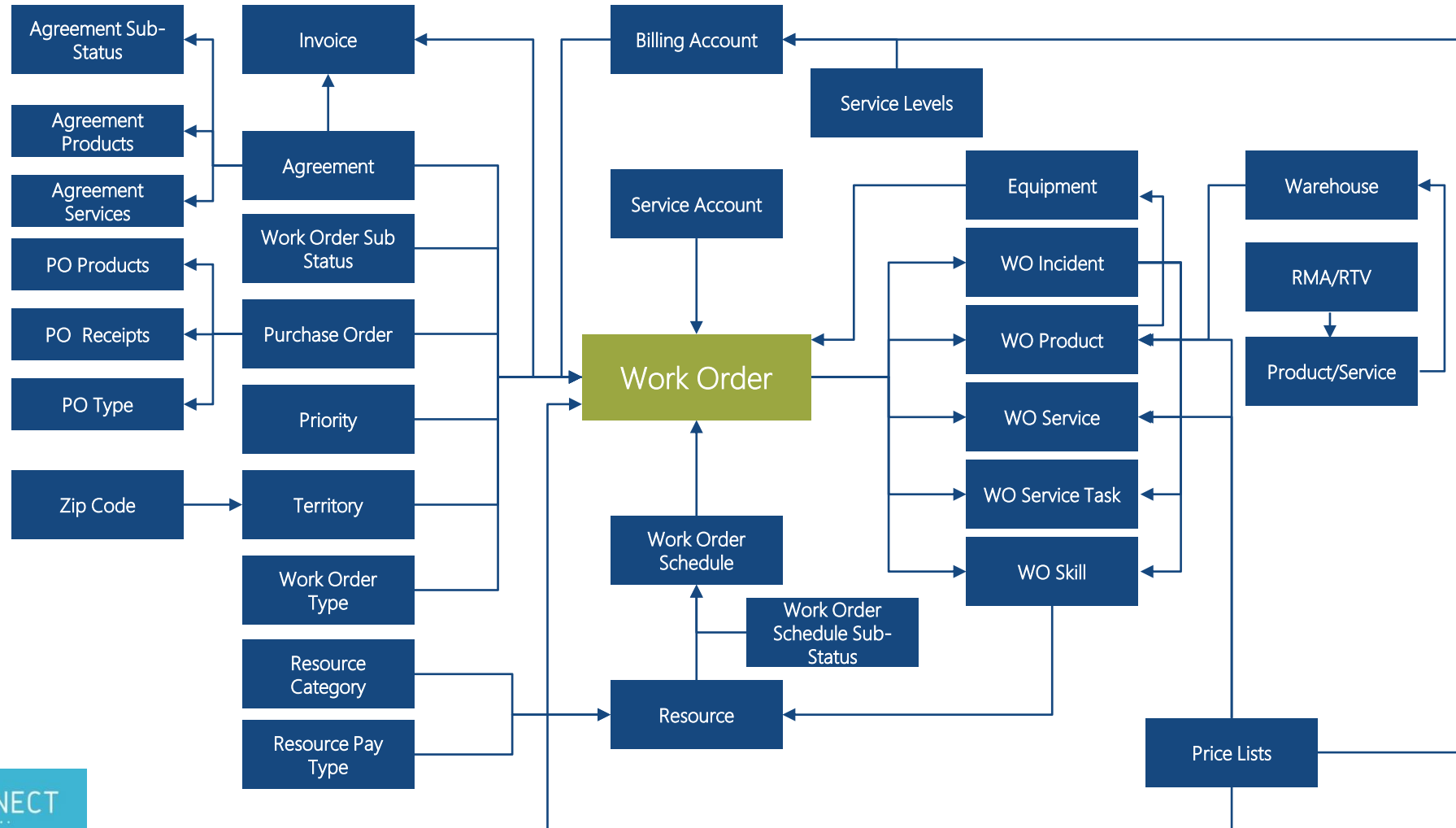
- Users
- Contacts
- Equipment



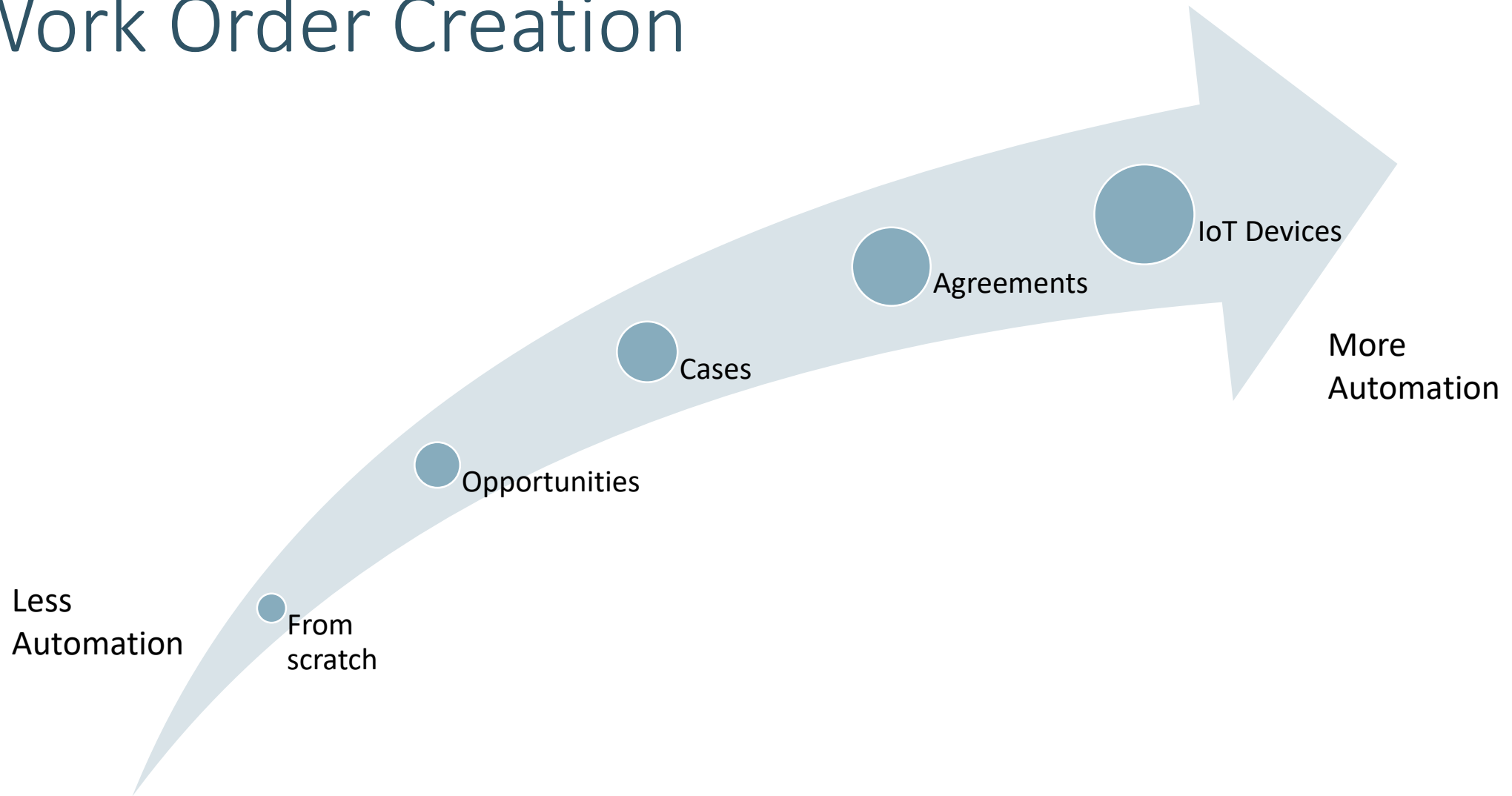
Resources



STONERIDGE CONNECT



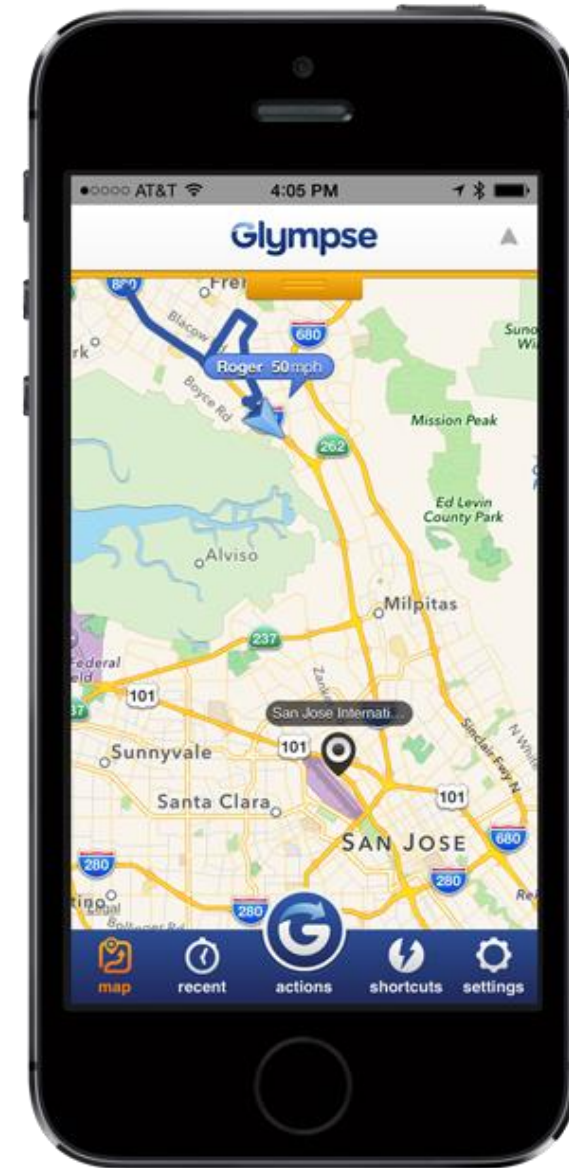
Work Order Creation



Demo

- Work Order Creation
- Agreements
- Scheduling

Customer Communication

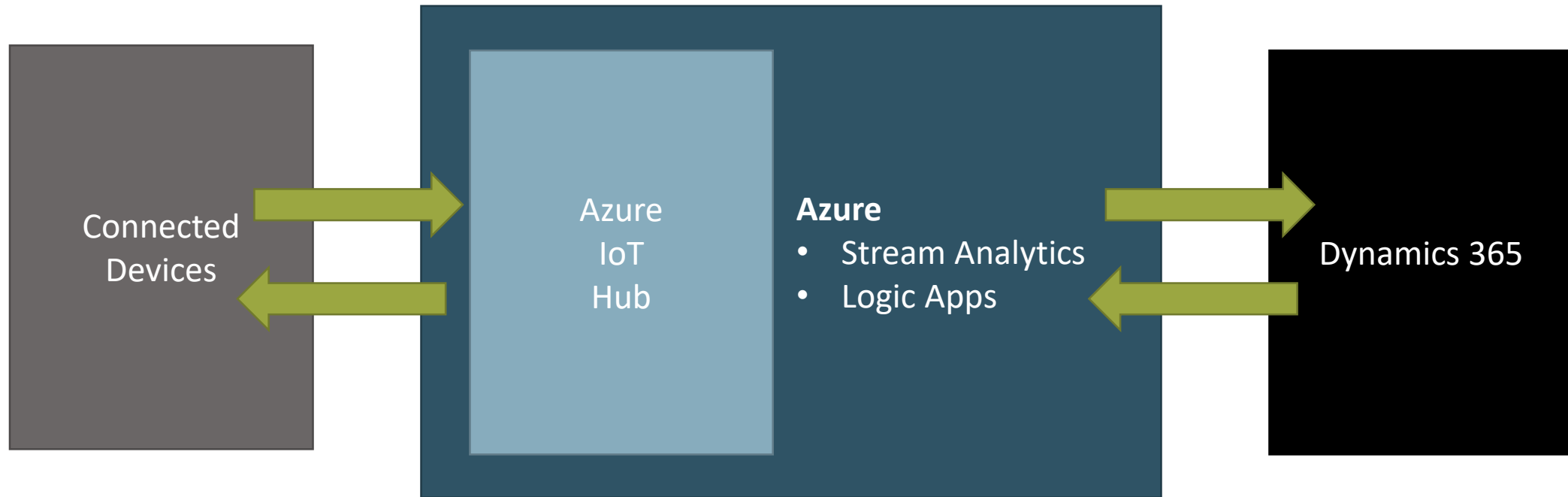


DEMO

- Delivering Services
- Mobile Application
- Approvals and Invoicing

There will be **50 Billion**
internet-connected devices by 2020,
a 100% increase over 2015.

Azure and IoT



Demo

- Connected Field Service Simulator
- <https://www.youtube.com/watch?v=P2HXGfk5nVA>



Device ID

IoT_Device

Refresh

Humidity



Temperature



Messages Received:

STONERIDGE CONNECT

Messages Sent:

[illegible]



Device ID

IoT_Device

Refresh



Humidity



Temperature



Messages Received:



Messages Sent:

```
CURRENT STATUS -> Temperature: 100 Humidity: 40  
CURRENT STATUS -> Temperature: 100 Humidity: 40  
CURRENT STATUS -> Temperature: 65 Humidity: 40  
CURRENT STATUS -> Temperature: 65 Humidity: 40
```

IOT DEVICE : INFORMATION

IoT_Device

Owner
Dan Leeman

General

Name	IoT_Device
Account	Stoneridge Software
Category	Thermostat
Time Zone	(GMT-06:00) Central Time (US & Canada)
Device ID	IoT_Device
Registration Status	Registered

NOTES

Enter a note

No Notes found.

IoT Alerts

Description	Customer Asse..
Temperature reading of 100 exceeded a threshold of 70	IoT_Device
Temperature reading of 94 exceeded a threshold of 70	IoT_Device
Temperature reading of 95 exceeded a threshold of 70	IoT_Device
Temperature reading of 102 exceeded a threshold of 70	IoT_Device

1 - 4 of 12

Tab



- + NEW
- DEACTIVATE
- DELETE
- OPEN PROCESSES
- CREATE COMMAND
- PROCESS
- ADD TO QUEUE
- QUEUE ITEM DETAILS
- ASSIGN
- ...

IOT ALERT : INFORMATION

Temperature reading of 100 exceeded a thresh...

Owner
Dan L

Created (Active for 11 minutes)

Create Case

Create Work Order

Schedule Work Order

- ✓ Device IoT_Device
- ✓ Description* Temperature reading of 100
- ✓ Alert Time 4/19/2017 11:06 AM

CFS - IoT Alert Process

General

Description*	Temperature reading of 100 exceeded a threshold of 70
Alert Type	Anomaly
Alert Token	63c90ef3-0e8b-4fe7-9ccc-82f69b449d6c
Alert Time	4/19/2017 11:06 AM
Alert URL	--
Alert Data	{"deviceid":"IoT_Device","readingtype":"Temperature", "reading":100.0,"eventtoken":"63c90ef3-0e8b-4fe7-9ccc-82f69b449d6c", "threshold":70.0,"ruleoutput":"AlarmTemp","time":"2017-04-19T16:06:19.207Z"}

NOTES

Enter a note

No Notes found.

Connected Device Reading

Add a Po...

Active

Thermostat simulator

IoT Alert: Temperature re

simulatoriotfsb4bc8823a7fb447dba86ef03a0fbfde3.azurewebsites.net/?host=IoTFS99915a04eaf5453592cad116a4170481&key=YCl6pjtlfz0e2bN9YPie%2Fepd2GRI43ehebtSOkwx

Apps

Bookmarks

Personal

CRM

Internal CRM

O365

KLN

Other bookmarks


Field Service IoT

Thermometer

Connection

Reboot

Connection Status: Connected



Device ID

IoT_Device

Refresh

Humidity

40%

Temperature

100°F

Messages Received:

Messages Sent:

CURRENT STATUS -> Temperature: 100 Humidity: 40
CURRENT STATUS -> Temperature: 100 Humidity: 40
CURRENT STATUS -> Temperature: 100 Humidity: 40
CURRENT STATUS -> Temperature: 100 Humidity: 40
CURRENT STATUS -> Temperature: 100 Humidity: 40
CURRENT STATUS -> Temperature: 100 Humidity: 40

Ask me anything

11:32 AM 4/19/2017

Questions?

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