

Share a 360-degree relationship view and real-time guidance, to improve resolution time and earn client trust.

- ✓ Resource Optimization
- ✓ Transform Service Delivery
- ✓ Empower Technicians

DYNAMICS 365 FIELD SERVICE

Utilize the world class end-to-end business services using our dynamics 365 consultation to give your customers remarkable experience.



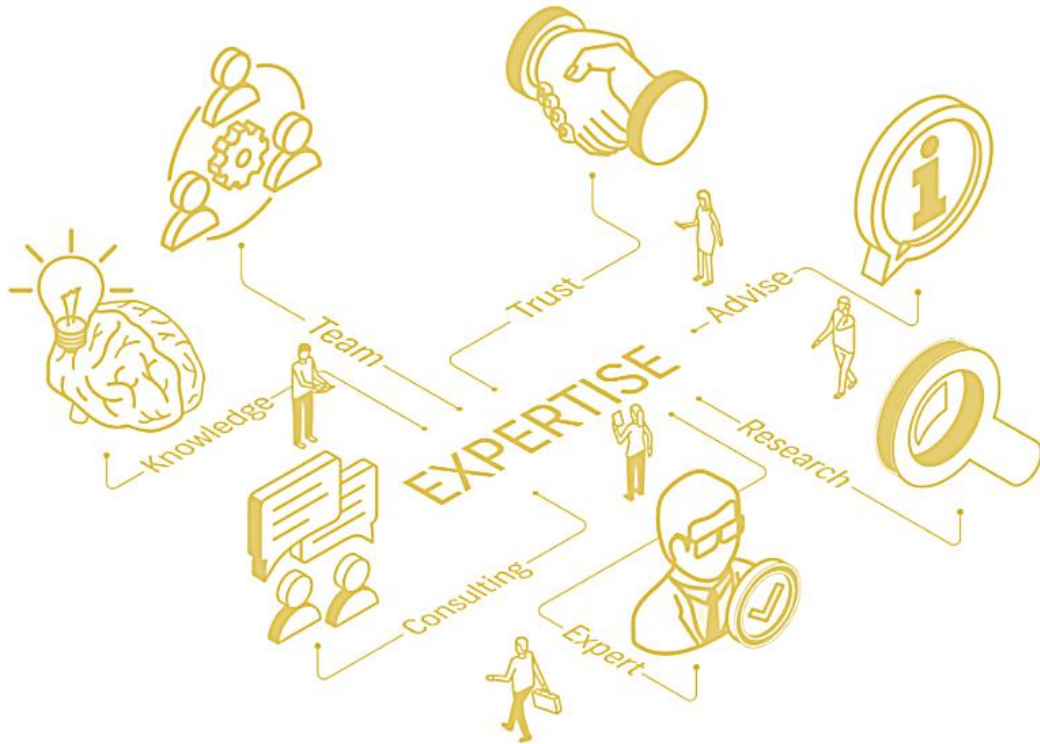
Cognitive Convergence

<http://www.cognitiveconvergence.com>

+1 4242530744

shahzad@cognitiveconvergence.com

About Us



Cognitive Convergence is a subject matter expert in Dynamics 365 consulting having certified and experienced consultants which will create custom, robust, and scalable apps for different business needs in no time.

Our core Dynamics 365 Field service consulting are:

- ✓ Schedule optimization
- ✓ Asset management
- ✓ Invoice processing
- ✓ Improve first-time fix rate
- ✓ Complete more service calls per technician per week
- ✓ Schedule onsite visits when it's convenient for the customer
- ✓ Reduce travel time, mileage, and vehicle wear and tear
- ✓ Organize and track resolution of customer issues
- ✓ Detect service issues remotely with IoT.
- ✓ Keep customers updated with the status of their service call and when it's resolved
- ✓ Use insights to schedule preventive maintenance.
- ✓ Manage follow-up work and take advantage of upsell and cross sell opportunities

Current Location: Lahore, Pakistan

Planned Front-end Office: California/Washington States- USA

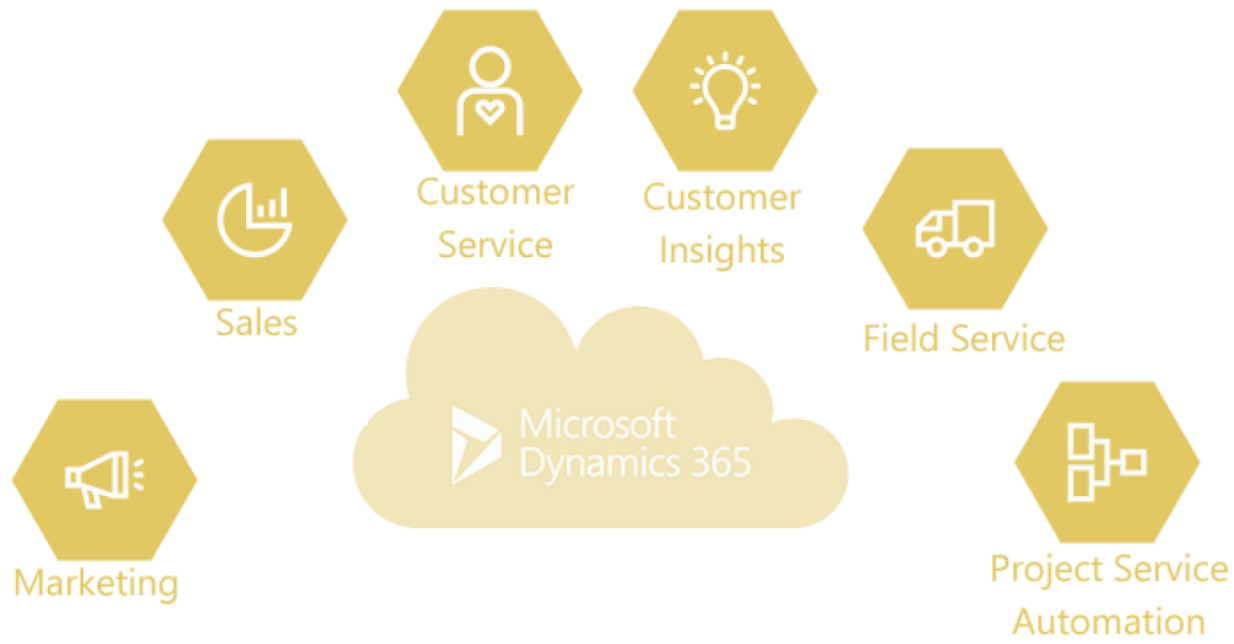
Microsoft Dynamics 365

Microsoft Dynamics CRM, an excellent customer relationship management (CRM) software. Its helps to:

- ✓ Accelerate the business growth with connected business applications to optimize the operations.
- ✓ Drive better outcomes across the business by combining the data with AI.
- ✓ Encryption, and role-based access to auditing and logging.
- ✓ Handle customer databases efficiently.
- ✓ Generate new leads.
- ✓ Tackle customer service problems.
- ✓ Deliver more value in less time.
- ✓ Enable teams to accelerate results.
- ✓ Customer insights.
- ✓ Editable grids.
- ✓ Web API enhancements.
- ✓ Activity sorting control.
- ✓ Programmatic management of product properties.
- ✓ Define access permission for modular business apps.
- ✓ Use form scripts to add icons with tooltip text for view columns



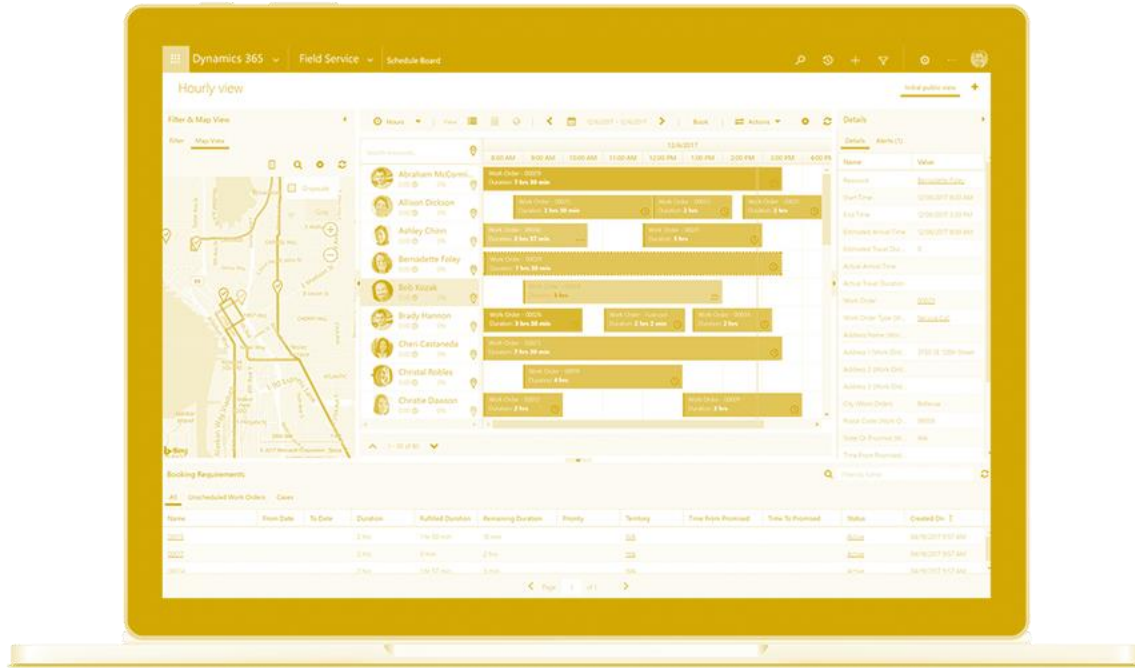
Modules of Dynamics 365



- ✓ Customer Service
- ✓ Field Service
- ✓ Finance and Operations
- ✓ Marketing
- ✓ Project Operations
- ✓ Retail
- ✓ Sales
- ✓ Human Resources
- ✓ Supply Chain Management
- ✓ Business Central
- ✓ Commerce



Field Service Overview



Field Service (formerly known as Field Service Lightning) business application **helps organizations deliver onsite service to customer locations**

- ✓ Combines workflow automation, scheduling algorithms, and mobility
- ✓ Set up mobile workers for success
- ✓ Improve first-time fix rate
- ✓ Complete more service calls per technician per week
- ✓ Manage follow-up work and take advantage of upsell and cross sell opportunities
- ✓ Reduce travel time, mileage, and vehicle wear and tear
- ✓ Organize and track resolution of customer issues
- ✓ Communicate an accurate arrival time to customers
- ✓ Provide accurate account and equipment history to the field technician
- ✓ Keep customers updated with the status of their service call and when it's resolved
- ✓ Schedule onsite visits when it's convenient for the customer
- ✓ Avoid equipment downtime through preventative maintenance



Benefits of D365 Field Service

LET'S GIVE YOU SNAPSHOT OF THE ENTIRE FEATURES
DYNAMICS 365 FIELD SERVICE BRINGS:



Some benefits of Dynamics 365 Field Service are:

- ✓ Create records that represent your field service workers, dispatchers, and agents, and add details about their skills, location, and availability
- ✓ Set up multilevel service territories that represent the regions where mobile workers can provide services
- ✓ Track the location and status of your inventory, warehouse, service vehicles, and customer sites
- ✓ Schedule one-time or recurring work orders for customers, and add details about worker preferences, required skills, and parts
- ✓ Real-time remote expert collaboration using mixed reality.
- ✓ Create maintenance plans and templates to standardize your field service tasks
- ✓ Generate service reports to keep customers informed about service progress
- ✓ Smart route planning



Time Entries



- ✓ Process of recording the actual time that a resource consumes.
- ✓ Allow cost and sales prices to be calculated as tasks progress
- ✓ Help the Project manager keep on top of projects and tasks
- ✓ Notify Resource managers of any potential vacation or absences
- ✓ Help field service organizations better track the time
- ✓ Time entries are useful for:
 - reporting
 - understanding utilization
 - billing and invoicing for service
- ✓ Users can track against any level in the project.
- ✓ Team members create and submit time entries for approval

Dimensions & Time Entry



Dimensions:

- ✓ Dimensions section shows the dimensions that time can be entered against
- ✓ Out of the box supported dimensions
 - Project
 - Project Task
 - Role
 - Type
 - Entry Status
- ✓ Do not allow inline editing

Time Entry Status

- ✓ **Draft:** New time entries are automatically assigned a status of **Draft**. Only time entries that have a status of **Draft** can be deleted.
- ✓ **Submitted:** When a time entry is submitted, the status is updated to **Submitted**.
- ✓ **Approved:** When a submitted time entry is approved, the status is updated to **Approved**.
- ✓ **Returned:** If a time entry is rejected, the status is updated to **Returned**, and the entry becomes available for correction and resubmission.



Time Off Requests



- ✓ Formal request from an employee to take time off.
- ✓ Exact content depends on the organization's requirements
- ✓ Best practices
- ✓ Having a policy when multiple people want the same day off
- ✓ Setting up rules when people can ask for time off
- ✓ Separating requests for holidays from those for medical reasons
- ✓ Not asking for too much personal information
- ✓ Users with **Field Service-Administrator** or **Field Service-Resource** security roles can approve time-off requests



Unpaid & Paid Time off request



Unpaid Time Off

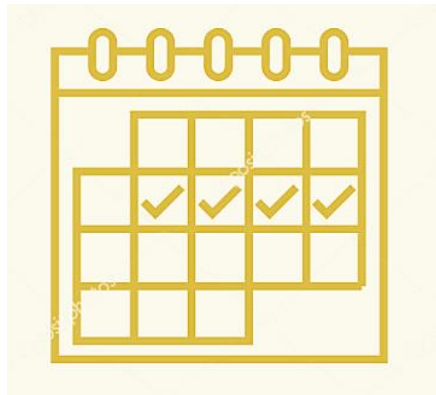
- ✓ Unpaid time off requests are time away from work without wages
- ✓ Laws for unpaid time-off vary state-to-state
- ✓ Includes any absence from work not covered by existing employee benefits
- ✓ Employee eligibility matters for unpaid time-off

Paid Time off request

- ✓ Benefited program that permits employees to take time off work for a specific number of days
- ✓ Workers can take a leave from work while still earning wages.
- ✓ Amount of time off given to staff members, limited to a set amount of PTO hours each calendar year
- ✓ Includes:
 - Medical Leave
 - Bereavement leave
 - Annual leave
 - Parental leave
 - Vacation requests



Bookings Overview



Booking Statuses:

- ✓ Precisely reflect your processes bespoke booking statuses and accompanying colors can be set.
- ✓ Set statuses will appear on the scheduling board.
- ✓ Addition to confirmed bookings, other statuses could include:
 - proposed bookings,
 - showing travelling time,
 - work in progress
 - and completed jobs.



Booking Rules:

- Allowing systems admins to define warning alerts or error message,
- Triggered when users create or edit resource bookings based on custom conditions.



Bookings Structure



Territories:

- ✓ Organizations works across different geographical areas; service territories can be configured to help scheduler.
- ✓ Quickly find the best qualified resources within a defined territory.

Post Code Records:

- ✓ Relate to service territories meaning that accounts can be automatically assigned to a territory when the address is entered.
- ✓ Post code field on an account record, Dynamics 365 will automatically populate the service territory field when a match is made.



Work Orders



Work Order

- ✓ Work orders record details what work needs to be done and manages the required resources.
- ✓ Work orders are raised for any type of field service work such as:
 - installations,
 - maintenance
 - and repairs.

Incident Types

- ✓ Service templates which enable users to quickly raise work orders for frequent routine service jobs.
- ✓ Every incident type template details the service tasks that need to be:
 - completed,
 - the required skills for this job type
 - the estimated work order duration.

Priority

- ✓ As implied, this option will prioritize work orders. It includes:
 - Assigning a custom color
 - Showing in the schedule board
 - Help schedulers visually distinguish the priority of each job.



Work Orders Types



Work Order Type

- ✓ Categorize different types of work orders such as:
 - Installations
 - Repairs
 - Upgrades
 - Maintenance
 - Other types that enable work order information to be filtered in views, reports and dashboards as well as the schedule board.

Work Order Sub-Statuses

- ✓ Each work order record progresses its status values will be set.
- ✓ Field Service app has 6 standard settings including:
 - Open - Unscheduled,
 - Open - In Progress
 - Closed - Posted.



Work Order-Services

Service Task Types

- ✓ Detailed in an incident type template, and ultimately the work order.
- ✓ Duration for each item will roll up to define the overall work order duration.
- ✓ **For example:** Within an equipment repair incident type, a series of service tasks may be defined that detail each check and action an engineer should follow to investigate and resolve the issue.
- ✓ **Time Groups:** can be specified as multiple time windows for scheduling field service work e.g., 9am - noon, noon - 4pm or 4pm - 7pm



Inventory

- ✓ Efficiently manages your assets
- ✓ Tracks asset movement and related work orders.
- ✓ Helps reduce the costs associated with each service operation

Benefits

- ✓ **Inventory measurement** at all levels including truck, depot, and warehouse
- ✓ **Automated inventory** management can be configured based on field use, transfers, new purchases, replacements, returns, and so on.
- ✓ **Integration with IoT** for implementing connected inventory
- ✓ **Efficient inventory** forecasting and cost management



Microsoft Dynamics 365 for Field Service



Product Overview



Product

The product includes the following:

- Warranty information
- Price
- Model number
- Serial numbers

Accountable warehouse tracks:

Quantity Available - how many units remain to be sold.

Quantity Allocated - how many units are currently listed on work orders as allocated work order products.

Quantity on Hand - sum of quantity available and quantity allocated. Basically, unsold units.

Quantity on Order - how many units are currently listed on purchase orders but haven't been received and added to inventory. Basically, units that are on the way.



Products Properties

Customer Asset

- ✓ Capability tracks serviceable items that are installed at a location which will often be a customer's premises.
- ✓ Asset record tracks each activity specific to this item including a work history that details all visits including installation, servicing and repairs.
- ✓ Record can also be used to store an image asset.

Price List

- ✓ Customer will be charged for your product and services.
- ✓ Field Service price list is associated with work orders and includes standard Dynamics price list capability.
- ✓ Services includes:
 1. Functionality to allow for a minimum charge amount to reflect a base charge for all call outs,
 2. A minimum charge duration and flat fee pricing for fixed cost visits.



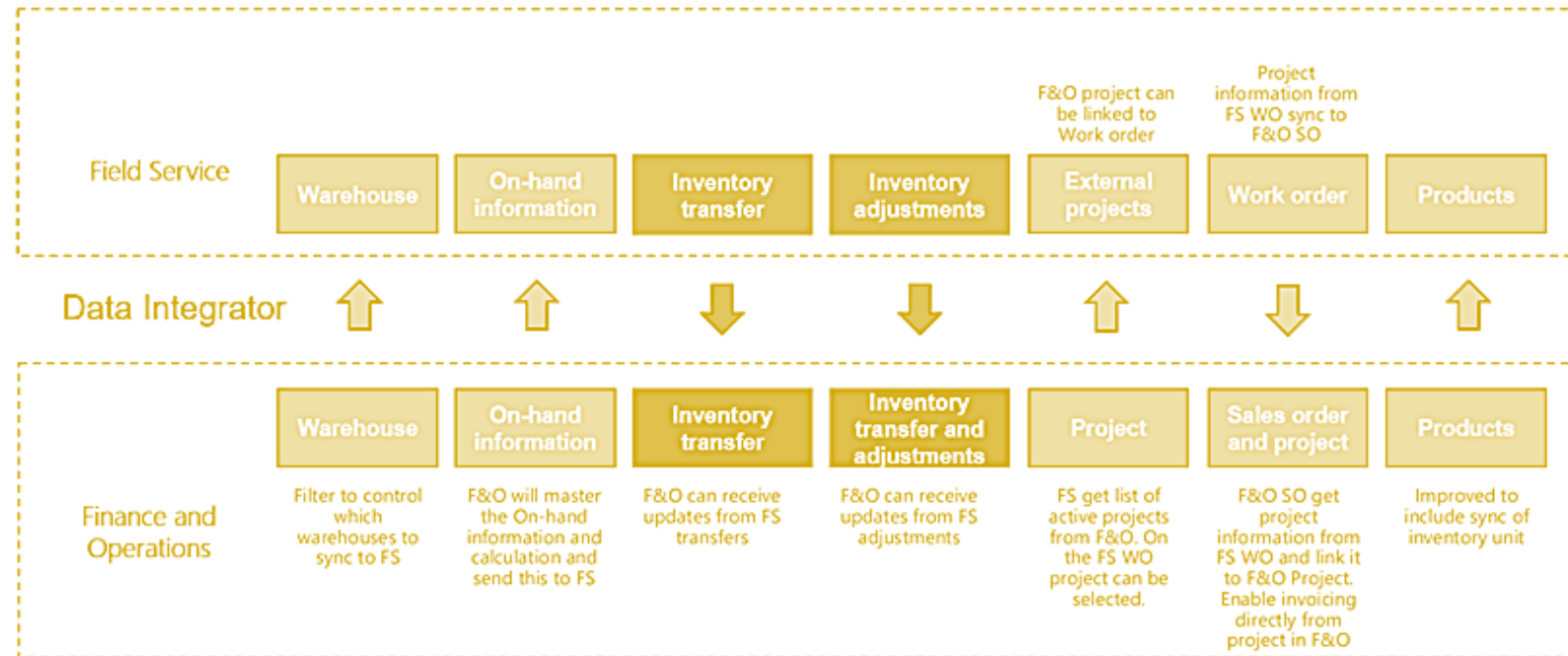
Inventory Migration

Transfers

- ✓ Transfer inventory from a source warehouse to a destination warehouse.
- ✓ Common example of this is transferring inventory from a warehouse to a technician's truck.

Adjustments

- ✓ Manually add or subtract inventory from warehouses.
- ✓ Used for routine checkups to reflect shrinkage and defects.
- ✓ Helps compare expected inventory to actual inventory,
- ✓ Helps adjusting for the difference.



RMAs



RMA - Return Merchandise Authorization

- ✓ RTV - Return to Vendor
- ✓ RMA should be created in Field Service when a product is returned.
- ✓ There are three ways of returning a product:
 - Return to warehouse,
 - RTV,
 - Change equipment ownership.
- ✓ All product returns should begin with an RMA.
- ✓ The RMA is associated to the:
 - Product,
 - Unit,
 - Quantity,
 - Related work order,
 - Price list for the return,
 - Type of return.



RMA Inventory



RMA Receipts

- ✓ Responsible for the return
- ✓ Allocated a date when the product would be taken by someone.
- ✓ Captured in RMA Receipt along with the quantity.
- ✓ After this RMA receipt is processed, the correct inventory or equipment adjustment is carried out.



RTVs



Field Service supports three out-of-the-box returns:

- Return to warehouse
- Return to vendor
- Change of equipment ownership
- ✓ Return is not finalized until an RMA receipt is created.
- ✓ RMA receipt confirms that the correct product and quantity are received
- ✓ Common **examples** for why returns may be initiated include:
 - Part or equipment is defective.
 - Customer is dissatisfied.
 - Repair is needed and the repair will not take place on site, but back at the service provider's or manufacturer's location.
 - Equipment was at the customer's location as part of a lease that is ending and will not be renewed.



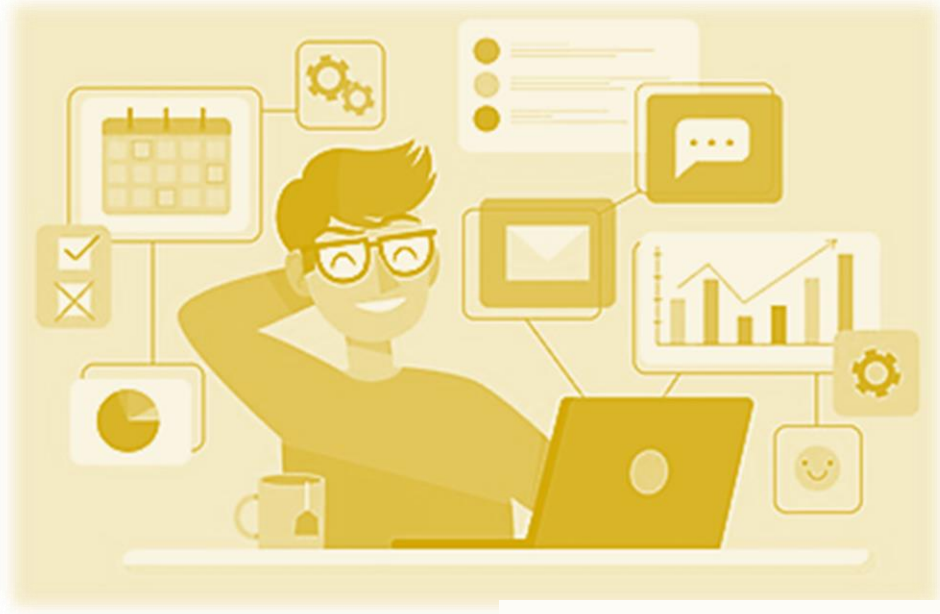
Inventory

Warehouse

- ✓ Provides a detailed inventory and transaction history.
- ✓ Represent a fixed warehouse, or a vehicle used by field service engineers.
- ✓ Each product in the warehouse this reports the physical quantity at the warehouse on the van, the quantity allocated, volume on order and the actual quantity available.
- ✓ Products carried on a van; engineers can use the Field Service mobile app to add items to a work order that will update the inventory accordingly.



Purchase Orders



Purchase orders (POs) are used to order products to a warehouse or directly to a work order to complete on-site work.

- ✓ Track items that need to be ordered from suppliers with associated system statuses including submitted, received and billed.
 - ✓ Enabling more precise tracking of purchase order statuses in line with custom-made processes.
 - ✓ The purchase order process includes:
 - Requesting products from a vendor by creating a purchase order and adding Purchase Order Products.
 - Gaining approval.
 - Documenting receipt of products by creating a PO receipt and PO Receipt Products.
- Add the received products to warehouse inventory or as work order products.



Purchase Orders Structure



- ✓ From the purchase order receipt, add related purchase order receipt products.
- ✓ Purchase order receipt doesn't need to contain all products requested or all quantities requested.
- ✓ Products will often be received as they arrive.
- ✓ Products may arrive sooner, and larger quantity shipments may arrive in multiple shipments.
- ✓ Multiple purchase order receipts can be created for a single purchase order.



Billings-External



Customer billing

- ✓ Simple billing of project services
- ✓ Integrated view for preparation, timesheet and billing itself
- ✓ Clear correction of all services before billing
- ✓ Partial payments for projects
- ✓ Billing fixed prices, time and material or a combination
- ✓ Generate automatic timesheets as basis for billing
- ✓ Adapt timesheets via parameters
- ✓ Totaling on sub-project Level in the timesheet
- ✓ Distinction between projected time and billable time
- ✓ Continuous integration in Microsoft Dynamics CRM pricing, product catalogue and order management
- ✓ Manual transfer of invoice line items or transfer to an ERP system (optional)
- ✓ Create travel expense reports



Billings-Internal



Employee billing

- ✓ Employee performance report
- ✓ Billing monthly, quarterly or in differing time periods
- ✓ Compensation for travel expenses
- ✓ Billing external service providers
- ✓ Performance reports of external resources (e.g., freelancers)
- ✓ Billing monthly, quarterly or in differing time periods
- ✓ Management of performance periods for financial administration



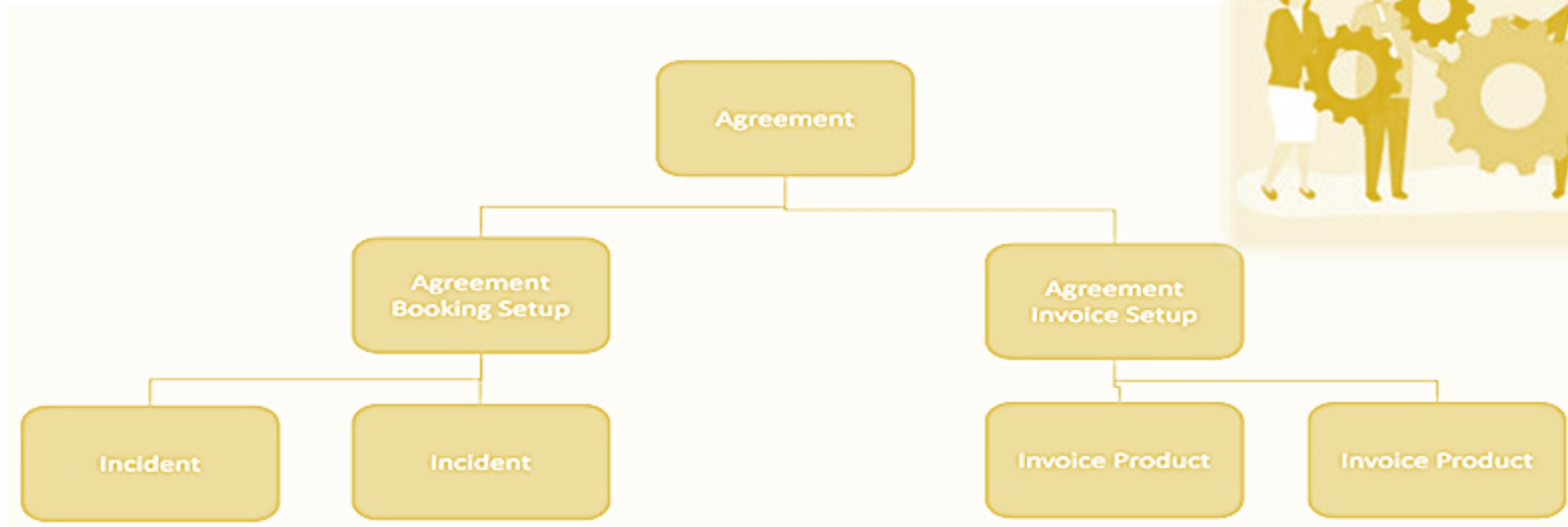
Invoicing

- ✓ Invoice printout directly in CRM
- ✓ Transfer billing information to an ERP System
- ✓ Distinction between intercompany invoices and external invoices
- ✓ VAT management, also according to foreign business activities
- ✓ Consideration of performance periods



Agreements

- ✓ Provides the framework to automatically generate work orders and invoices.
- ✓ Agreement record can define the frequency that work orders are generated and the detail of the work order for maintenance work.
- ✓ Agreement records details customer information including:
 - billing account,
 - start / end dates
 - and pricing.



Agreements Set-up

Agreement Booking Set-Up:

- ✓ Defining the type of activity that much be performed.
- ✓ Priority level and if a work order should be automatically scheduled
- ✓ Many days in advance a work order will be generated for flexibility to fit in with a customer's availability.

Payment Terms:

- ✓ Used with purchase orders enabling purchase managers to set these when creating a purchase order.

Tax Codes:

- ✓ Specifying how tax will be applied to your products, agreements and services

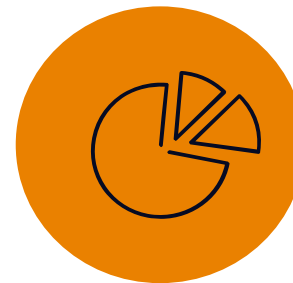


Field Service Schedule Dashboard

Resource and operations managers need to be able to monitor key operational metrics so that they can gauge resource and scheduling performance

✓ Field Service and resource scheduling optimization provide three reports focused on different scenarios and user personas:

1. Resource and utilization, included with Field Service
2. Resource scheduling optimization admin, included with resource scheduling optimization
3. Optimization summary, included with resource scheduling optimization



Schedule Dashboard - KPIs

Performance

- ✓ Loading the schedule board
- ✓ Selecting schedule board tabs
- ✓ Dragging and dropping work orders
- ✓ Rescheduling bookings

Whom does this feature benefit?

- ✓ Management team and the dispatchers
- ✓ Company resources
- ✓ Your business as a whole

Usability and accessibility

- ✓ Schedule board made up of Power Apps Component Framework (PCF)
- ✓ Control based on the Unified Client Interface.
- ✓ More flexible, supportable, and accessible.
- ✓ Work better on different screen sizes and across form factors



Resource Management



Bookable Resource:

- ✓ Anything that needs to be scheduled is classified
- ✓ as a bookable resource.
- ✓ Individuals who may be users, contacts and accounts.
- ✓ Includes company assets and crews of worker

Bookable Resource Categories:

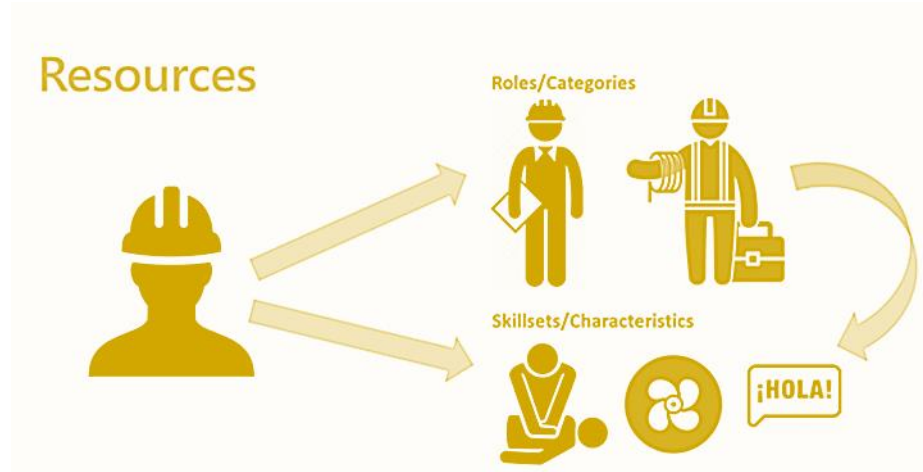
- ✓ Each bookable resource can be grouped by type.
 - Technician (Individuals)
 - Supervisor (Individuals)
 - Subcontractor (Individuals)
 - Vehicle (for field service job)
 - Equipment (for field service job)

Resource Pay Types:

- ✓ Tracking the organization's costs associated with a resource booking.



Resource Properties



Characteristics:

- ✓ Define the skills and competencies of each resource.
- ✓ Includes tracking of individual qualifications, certifications and experience.
- ✓ Help schedulers find and book the best suited individuals for each requirement.

Proficiency Models

- ✓ Proficiency Models are also known as Rating models.
- ✓ Values that can be optionally added to a bookable resource characteristic.
- ✓ Rating model is the 'container record' that holds the different values that a user can rate a resource as for a skill or certification.
- ✓ There are 3 Rating Values:
 - Familiar
 - Good
 - & Proficient



Resource Templates



Work Hours Templates

- ✓ Create and manage a project
- ✓ Apply a calendar template to the project.
- ✓ Calendar template defines the following project attributes:
 - Working hours, including start and end time
 - Working days
 - Calendar exceptions such as non-working days
- ✓ Calendar template that's applied to a project is a copy of the calendar template defined in the organization's settings.
- ✓ Two key requirements:
 - Define the desired working hours of the template using a new or existing bookable resource.
 - Create a new calendar template and associate the template with the bookable resource.



Resource Groups

 RESOURCE REQUIREMENT
AR12 Certification

General | Scheduling | Field Service | Related

Name	AR12 Certification
Owner	 First name Last name
From Date	--- 
To Date	--- 
Duration	---
Effort	1.0000
Status	 Active
Resource Type	---
 Requirement Group	 Building Job



Requirement Group Templates

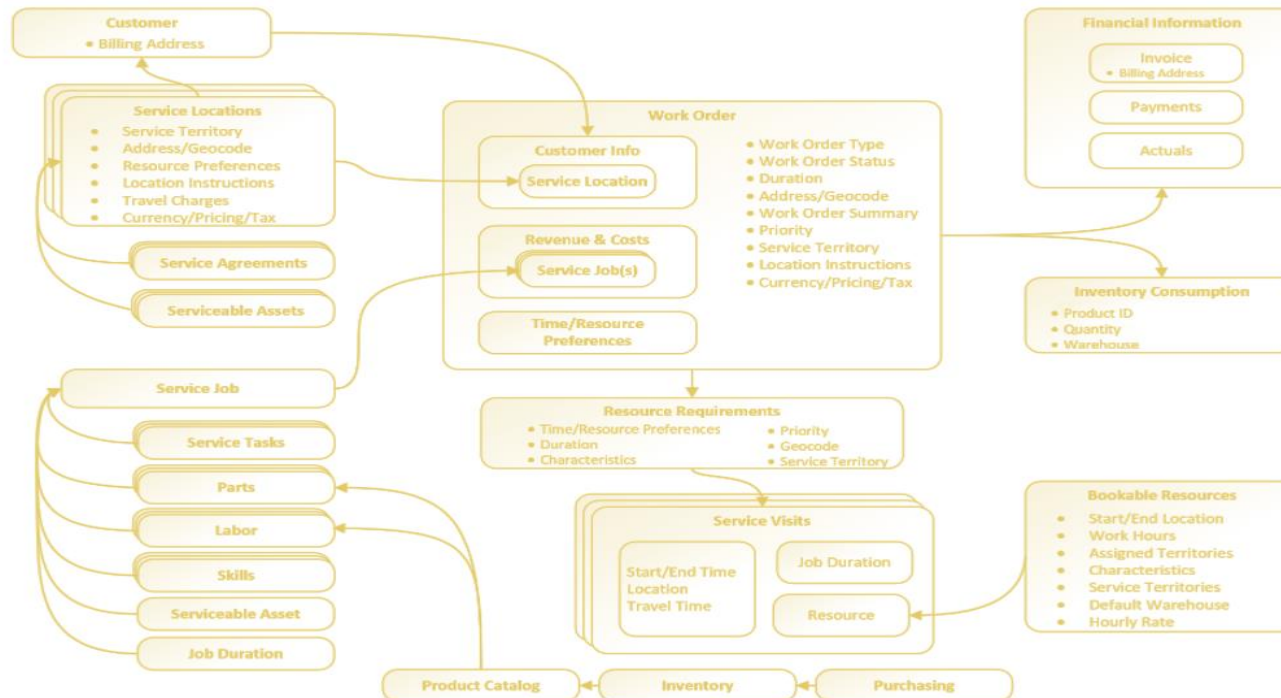
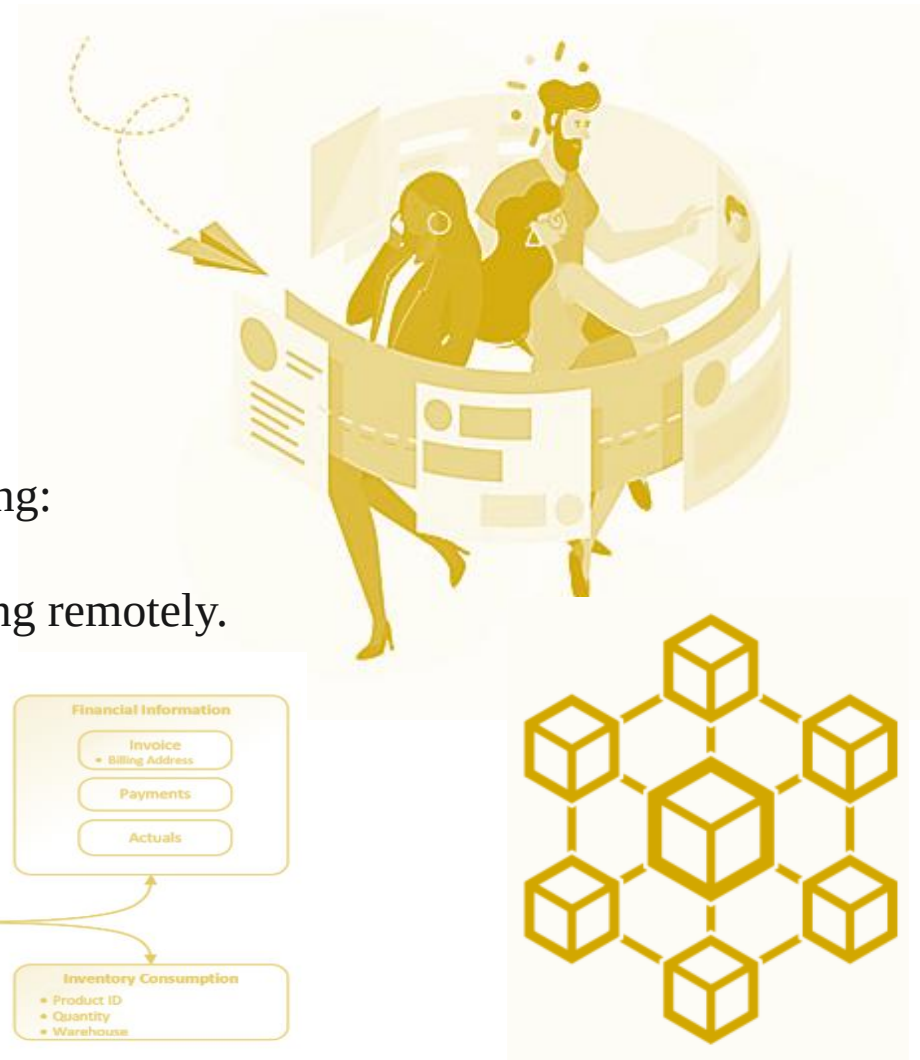
- ✓ Groups of resources that would be appropriate for a job
- ✓ Schedule all those resources with a single search.
- ✓ Mix and match the different types of resources such as:
 - Individual field technicians,
 - Whole crew,
 - Equipment,
 - Or facilities needed for a job.
- ✓ To schedule multiple resources with requirement groups, follow these steps:
 1. Create a requirement group template.
 2. Create a new requirement group.
 3. Book the requirement with the scheduling assistant.



Resource Example

For example:

- ✓ Use a requirement group to find resources for a work order requiring:
 - One field technician with skill A *and* skill B
- or-
- Two field technicians, one with skill A and the other with skill B.
- ✓ Use a requirement group to find resources for a sales demonstration requiring:
 - Two people in the same sales territory, with both working onsite.
 - Two people in the same sales territory, with one onsite and one working remotely.

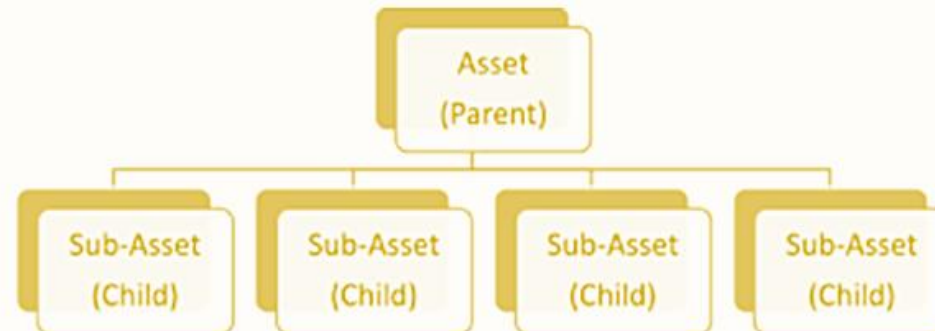


Assets

- ✓ Helps in keep tracking of the equipment
- ✓ Useful in maintaining a list of serviceable items related to a service location.
- ✓ With connected field service, connect customer assets to sensors that monitor the asset's health and trigger IoT alerts and work orders
- ✓ Components defined as a Sub-Asset of an Asset behave like “child” equipment associated with a “parent” equipment
- ✓ One Asset can have many sub-assets
- ✓ Allows to link a product to a service account
- ✓ Sub-assets can be removed or reassigned to another Parent Asset
- ✓ configured in a hierarchy to maintain service history at the sub-component level.



Asset Hierarchy



IoT Devices

Connected Field Service for Dynamics 365 integrates Internet of Things (IoT) devices with Dynamics 365 for Customer Engagement

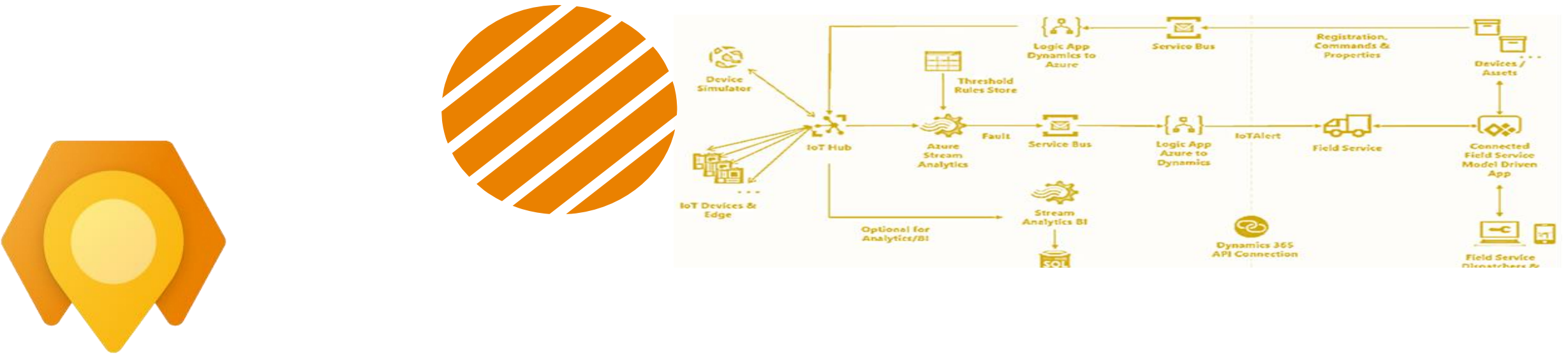
- ✓ IoT Central device dashboard can be updated with relevant service and scheduling information

Pros

- ✓ Simple architecture
- ✓ Short time to market
- ✓ Doesn't require specialized skills

Cons

- ✓ Customizations are not possible
- ✓ Device-level services are not exposed

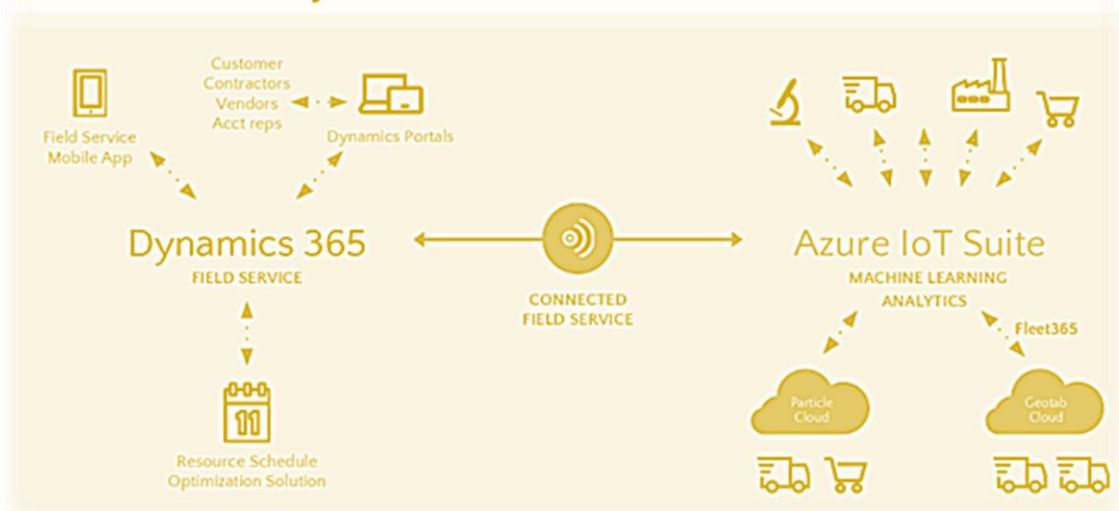


Powerful IoT Capabilities

- ✓ Connected Field Service is very powerful in allowing IoT scenarios
- ✓ Fully customizable and extensible.
- ✓ Enabled for any entity to be IoT-enabled for straightforward IoT integration
- ✓ Brings several new entities and custom actions specific to IoT.
- ✓ New custom actions allow:
 - Device registration scenarios,
 - Ability to parse incoming messages for String,
 - Number,
 - Boolean data types,
 - Capabilities to handle duplicate messages that may be received from an IoT device.
- ✓ IoT device data in custom dashboards to display:
 - aggregates,
 - determine trends,
 - or other metrics.



Microsoft Dynamics 365 for Field Service

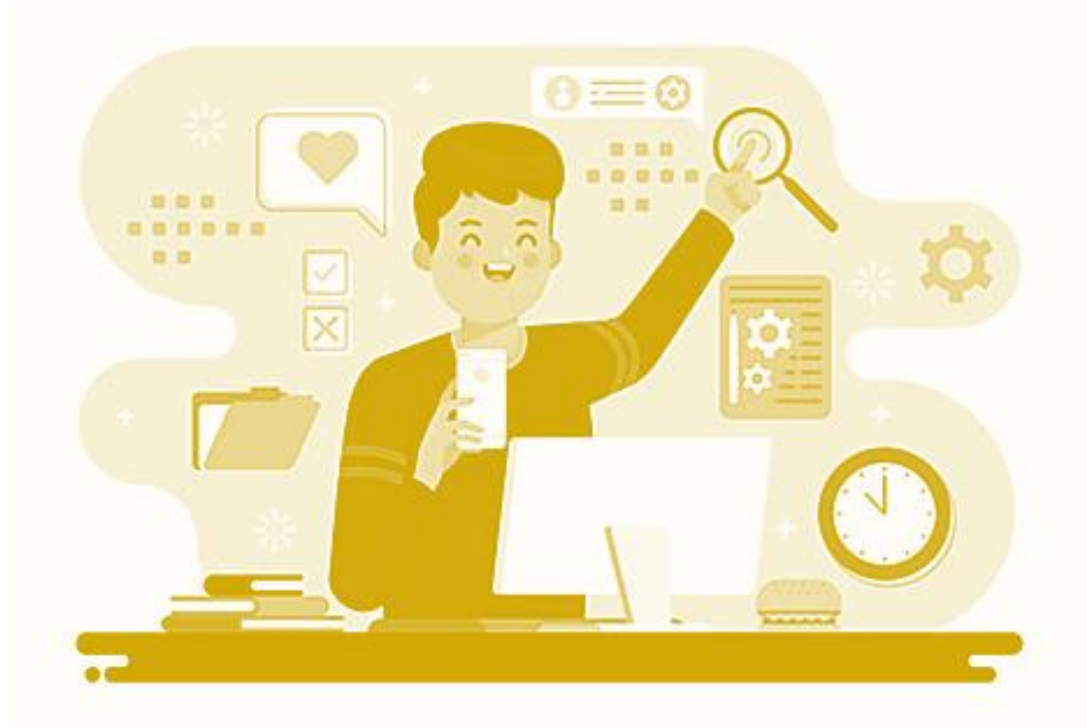


Functional Location

- ✓ Allows for more location granularity on a few relevant Field Service entities, such as
 - Within a service account
 - On an asset
 - On a specific work order
- ✓ Represented by hierarchical relationships
- ✓ functional locations can be used without being associated to service accounts
- ✓ Assets can also be associated directly to a functional location
- ✓ Functional locations help flesh out work order details
- ✓ Multiple accounts can be associated to a functional location tree
- ✓ Field Service technicians can see functional locations from their Field Service mobile apps



Reporting of Field Service



- ✓ Helps you get a birds-eye understanding of ongoing work across your organization, such as:
 - Number of open work orders at any given point in time
 - Average time to complete a work order
 - Average time it takes for technicians to travel to a customer location
 - Whether or not you are meeting customer expectations around travel time or other needs
 - Individual technician performs on all key metrics
 - Insights around specific territories, from work order volume to travel time and more



Dashboard of Field Service



- ✓ Field service dashboard neatly presents the various options.
- ✓ Settings needed to create the work orders and track them.
- ✓ Overview of current progress by configuring key field service metrics.
- ✓ Measures such as:
 - business value and
 - feature details to monitor KPIs.

Business value

- ✓ In order for service managers and dispatchers to ensure they are providing effective service.
- ✓ This new dashboard provides out-of-the-box field service metrics and measures.

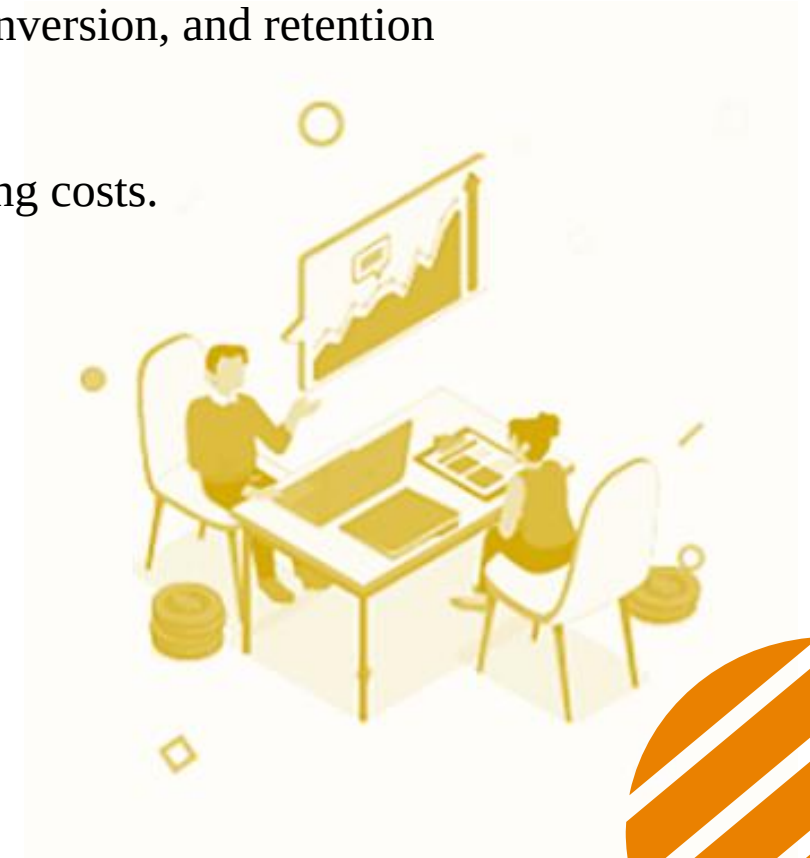
Dynamics 365 Development Services

1. Dynamics 365 Consulting/Customization

- ✓ Create and customization of schema features, metadata, business logic, design user-friendly dashboards, forms and views, notification templates, and optimization.
- ✓ Offer customization such as adding new fields, custom workflows, data collection and data processing.
- ✓ Extensively result-driven **services** help businesses transform various business operations.
- ✓ Successfully maintain quality customer services, enhance customer acquisition, conversion, and retention
- ✓ Customize the applications to deliver the best solutions
- ✓ Help different organizations to transform the business by earning profit and reducing costs.
- ✓ Assist clients with Dynamics 365 implementation



Gold
Microsoft Partner
 Microsoft



Dynamics 365 Development Services



2. Dynamics 365 – Power Platform Development

For each module Dynamics 365, we offer:

- ✓ Custom solution development via Power Apps, process automation/workflow management
- ✓ Turn ideas into organizational solutions by enabling everyone to build custom apps that solve business challenges by using Power Apps (Canvas & Model-Driven).
- ✓ Boost business productivity to get more done by giving everyone the ability to automate organizational processes by using **Power Automate**
- ✓ Dashboard-graphs implementation via **Power BI** & Make informed, confident business decisions by putting data-driven insights into everyone's hands.
- ✓ Easily build chatbots to engage conversationally with your customers and employees by developing intelligent chatbots via Power **Virtual Agents**.

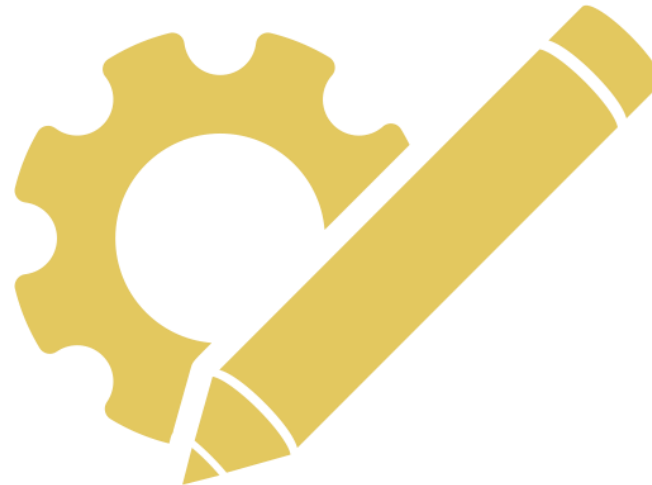


Dynamics 365 Development Services



3. Dynamics 365 Mobility Solutions

- ✓ Custom development for almost every type of computer device
- ✓ Advanced structural development service for different kinds of devices like:
 - Dynamics 365 for phones
 - Dynamics 365 for tablets
- ✓ Adopt Native App Development Approach for different devices
- ✓ Choose modern Front-end frameworks to make the solution compatible with every device operating with any modern operating system.



Dynamics 365 Development Services

4. Dynamics 365 Custom Integration

- ✓ Helped several organizations to migrate data from a particular CRM solution to Dynamics 365 CRM in a cost-effective manner.
- ✓ Incorporate the best practices and methodologies to map and move data from target CRM to Dynamics 365.
- ✓ Integrates Dynamics 365 with third-party applications and ERP systems to fulfill the rising demands of businesses.
- ✓ Streamline business analysis and integration for data syncing & data migration from 3rd party app

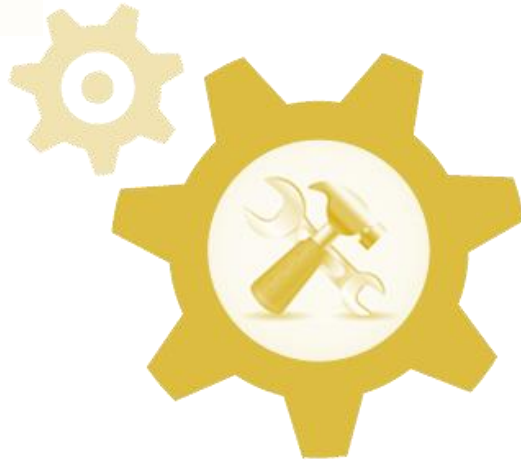


Dynamics 365 Development Services



5. Dynamics 365 Support

- ✓ Technical, functional as well as production support for the implementation of Microsoft Dynamics 365 CRM.
- ✓ Post-implementation support service assistance.
- ✓ Assist clients in solving arising or reoccurring issues to ensure the smooth operation of the app.
- ✓ Great ROI – with Microsoft Dynamics support, managed services offerings represent a significant saving.
- ✓ In-depth assistance and consultancy across all CRM related requirements



Dynamics 365 Development Services



6. Dynamics 365 User Training

- ✓ Highly experienced in designing, developing, and delivering custom-made, client-branded, collaborative learning solutions for any Dynamics 365.
- ✓ Develop training programs for users of any module of Dynamics 365 that reflect their way of working, incorporating the individual business processes and workflows for each role group.
- ✓ Training services include:
 - Training needs analysis (TNA)
 - Rapid Scope® – scoping your D365 training requirements
 - Development of bespoke deliverables including reference guides, quick cards, trainer packs, and three different eLearning options
 - Assistance with Skill the Trainer and Go-Live Support
 - Delivery in the form of classroom, presentation, eLearning, and various online solutions
 - Localization and translation services for global D365 rollouts



Dynamics 365 Development Services

7. PowerApps Component Framework –PCF for Dynamics 365

- ✓ Enhanced user experience for the users to work with data on forms, views, and dashboards
- ✓ Create code components that can be used across the full breadth of Power Apps capabilities
- ✓ Utilize the reusability of the code components
- ✓ Reuse these components many times across different tables
- ✓ Forms which provide support of modern web practices.
- ✓ Reusability, Access to a rich set of framework APIs that expose capabilities like:
 - Device features like camera, location, and microphone; and easy-to-invoke user experience elements like dialogs, lookups, and full-page rendering.
 - component lifecycle management,
 - contextual data,
 - Metadata Seamless server access via Web API;
 - Utility and data formatting methods;



Contact Us

Dynamics 365 Consulting services of Cognitive Convergence offers strategic opportunities to clients, investors, and partners that is:

- ✓ Unique and industry defining
- ✓ Mutual interest centric business approach
- ✓ Significantly enhance company's footprint
- ✓ Turn grow revenues by entering new and exciting Technology Domains, App development ideas, Solution Development, and Joint venture projects
- ✓ 1st mover advantage with
 - Talent: 100%
 - Timing: 100%
 - Technology: 100%
 - Technique: 100%



THANK YOU

Shahzad Sarwar

<http://www.cognitiveconvergence.com>

+1 4242530744

shahzad@cognitiveconvergence.com

For questions or queries, contact us, we will be sure to get back to you as soon as possible.