

# 01 / Prepare for implementation

Prepare the work before it reaches the technician. This guide helps you organize assets, scheduling assumptions, mobile access and the handoff between service and finance.

## Dynamics 365 Field Service

### A practical readiness guide

For business owners, process leaders and the people who will use and support the solution. Use this guide to settle responsibilities, surface dependencies and prepare a focused implementation conversation.

| BEFORE                  | DURING AND AFTER                                                                                |
|-------------------------|-------------------------------------------------------------------------------------------------|
| Agree the process       | Validate the complete business journey, including exceptions and approvals.                     |
| Prepare the information | Rehearse migration, reconcile critical records and confirm ownership.                           |
| Prepare the people      | Test real roles, support the first operating cycles and agree how improvement will be measured. |

### Scope before software

Scheduling optimization, connected IoT scenarios and additional applications can require separate licensing or services. We assess geographic coverage, resource types, mobile connectivity and integration needs before defining the deployment.

Prepared by Tripearltech | September 2026

Planning reference only. Product features, licensing and local requirements must be confirmed for your deployment. This guide does not replace an agreed statement of work or a detailed implementation plan.

## 02 / Settle the important decisions

Bring the owners of these areas into discovery. For each decision, record the current situation, the intended process, dependencies and who can approve the design.

| DECISION AREA          | WHAT TO PREPARE                                                                                                    |
|------------------------|--------------------------------------------------------------------------------------------------------------------|
| Work definitions       | Agree service types, priorities, task templates and what evidence makes a job complete.                            |
| Assets and locations   | Validate customer sites, equipment identifiers, hierarchies and the useful history technicians need.               |
| Scheduling assumptions | Confirm skills, territories, working calendars, travel allowances and rules for emergency work.                    |
| Mobile conditions      | Test device access, offline availability and synchronization at sites representative of actual service conditions. |
| Parts and billing      | Define the owner of stock, parts consumption, cost records and the approval that triggers invoicing.               |

### Record one measurable outcome

Choose a practical measure related to the problem you are solving. Define its calculation and source, record a baseline and agree a review date. Avoid treating a software feature as a business result.

Outcome and baseline: \_\_\_\_\_

Business owner: \_\_\_\_\_

Target and review date: \_\_\_\_\_

### Decision gate

The business sponsor accepts the scope, owners and assumptions. Critical unresolved decisions have a named owner and a date for resolution.

## 03 / Use a visible delivery plan

Agree what evidence will be reviewed at each stage. The implementation team prepares the work; the relevant business owners accept whether it meets the agreed need.

| STAGE                | WORK AND ACCEPTANCE                                                                                                                                                           |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Observe              | Follow the service request from intake to completed visit. Review technicians' real constraints and service promises. Gate: field process and pilot scope agreed              |
| Design               | Define work orders, assets, resource rules, mobile access and the parts-to-billing handoff. Gate: operational design accepted                                                 |
| Configure & rehearse | Build the process and test dispatch, offline work, rescheduling, parts usage and job review. Gate: end-to-end service scenarios passed                                        |
| Pilot & launch       | Start with representative resources and service types. Coach dispatchers and technicians, then expand when the pilot is ready. Gate: field and office readiness confirmed     |
| Stabilize & refine   | Review incomplete work, repeat visits and scheduling exceptions. Improve the process with feedback from the people using it. Gate: support and operational ownership accepted |

### Keep change decisions explicit

Record a requested change, why it matters, affected users, alternatives and its effect on cost, schedule and support. Separate approved scope from the future improvement backlog. Do not let informal requests silently change acceptance criteria.

### Name both sides of each handoff

For integrations and cross-team processes, identify who sends information, who accepts it and who responds if it fails. A technically successful exchange can still carry the wrong business meaning.

## 04 / Test the business, not just the screens

Select representative scenarios from your own organization. Include ordinary work, corrections, handovers and the situations that are difficult in the current process.

| CHECK              | EVIDENCE TO KEEP                                                                                                                               |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Process acceptance | Scenario, responsible owner, inputs, expected result and observed result. Include at least one meaningful exception for each critical process. |
| Data quality       | Mapping, record counts or control totals, sample business checks and accepted treatment of historical records.                                 |
| Roles and access   | Tests for each real role, restricted records and approval boundaries. Confirm what users cannot do as well as what they can.                   |
| Connected systems  | Expected update timing, duplicate handling, failed messages, recovery and reconciliation. Test realistic volumes where relevant.               |
| User readiness     | Role-based practice, short job aids, trained internal champions and a support route users can explain.                                         |

### Product-specific focus

Define the owner of stock, parts consumption, cost records and the approval that triggers invoicing.

### Do not leave acceptance implicit

Prioritize defects by business impact. Record the approver and rationale for any accepted workaround. Retest the correction and affected scenarios before closing the issue.

Test owner: \_\_\_\_\_ Acceptance date: \_\_\_\_\_

Outstanding critical issue: \_\_\_\_\_

Decision and responsible approver: \_\_\_\_\_

# 05 / Launch with a plan for support

A target date is not evidence of readiness. Rehearse the transition, agree the go/no-go authority and keep implementation expertise available through the first important operating cycles.

| WHEN          | WHAT TO AGREE                                                                                                                   |
|---------------|---------------------------------------------------------------------------------------------------------------------------------|
| Before launch | Task sequence, owners, data timing, user communication, support contacts and criteria for pausing or recovering the transition. |
| First 30 days | Prioritize issues by business impact, validate critical records and support users through the first real operating cycles.      |
| Days 31-60    | Complete handover, resolve recurring problems and update job aids. Confirm monitoring and escalation ownership.                 |
| Days 61-90    | Compare early performance with the baseline and agree an improvement backlog. Set a manageable review cadence.                  |

## Define support before it is needed

Agree coverage, response arrangements and the distinction between defects, user questions, data corrections and new requirements. Assign ownership for integrations, access changes, product updates and periodic review.

## Bring these details to your first conversation

Current systems and major pain points; business locations and user roles; key process owners; connected providers; known data issues; desired outcomes and timing constraints.

## Plan the next step with Tripearltech.

Consulting, implementation, migration, integration, training and support.

**info@tripearltech.com | +91 99041 30108**

Ahmedabad, India | Serving businesses worldwide

Official product reference: [Microsoft Dynamics 365 Field Service](#). Validate current capabilities and terms during assessment.