

OUTCOME

Microsoft Dynamics 365 Field Operations, Recovery & Client Self-Service Transformation

The organisation needed one digital operating model spanning quotation requests, pricing, case management, scheduling, field attendance, client self-service, agent interactions, compliance checks and outcome reporting. The challenge was not a single screen or workflow; it was coordinating several parties through one governed service lifecycle.



Microsoft Dynamics 365

INDUSTRY

Financial Services / Field Services / Asset Recovery

CUSTOMER

Australian field-services and recovery organisation

LOCATION

Australia

TECHNOLOGY

Microsoft Dynamics 365

SOLUTION

Australian Field Operations Transformation

DELIVERY PARTNER

CISIN

The Business Story

The Challenge

- Requests, commercial review and field execution relied on separate hand-offs.
- Clients and field agents required controlled self-service rather than back-office dependence.
- Scheduling needed to consider territory plus skills / certifications.
- Mandatory tasks, outcomes, SLAs and manual-review rules had to be consistently enforced.

The Solution

- Connect request-to-quote-to-case-to-work-order processing.
- Use client and agent portals for controlled interactions and evidence capture.
- Automate work-order creation, service mapping, notifications and business events.
- Keep back-office governance and auditability while reducing manual administration.

The Outcome

- **End-to-end service lifecycle.** RFQ and quote processing feed case creation, one or more work orders, attendance, outcomes, review and invoice-readiness.
- **Multi-party digital experience.** Power Pages provides client and field-agent experiences for requests, job acceptance, tasks, evidence uploads, communication and status visibility.
- **Resource and requirement matching.** Territory, skills / certifications and requirement characteristics support better resource suggestions and scheduling.
- **Rules and compliance automation.** SLA events, mandatory-task enforcement, outcome rules and manual-review paths are automated through Dataverse and Power Automate.
- **Multi-asset orchestration.** Where the request covers multiple assets, the solution can create corresponding customer assets and work orders under the same case.

Business Impact

One

Connected lifecycle request to field execution

Fewer

Manual hand-offs through workflow automation

Better

Traceability Dataverse + event history

Secure

Self-service client + field agent

Technology Landscape

Dynamics 365 Field Service

Dataverse

Power Pages

Power Automate

Model-Driven Power Apps

Universal Resource Scheduling

DELIVERED IN COLLABORATION WITH



CISIN

CISIN is a technology solutions and services company specializing in Enterprise Integration and API Services, helping organizations connect applications, systems and data through modern integration, API, cloud and legacy modernization solutions.