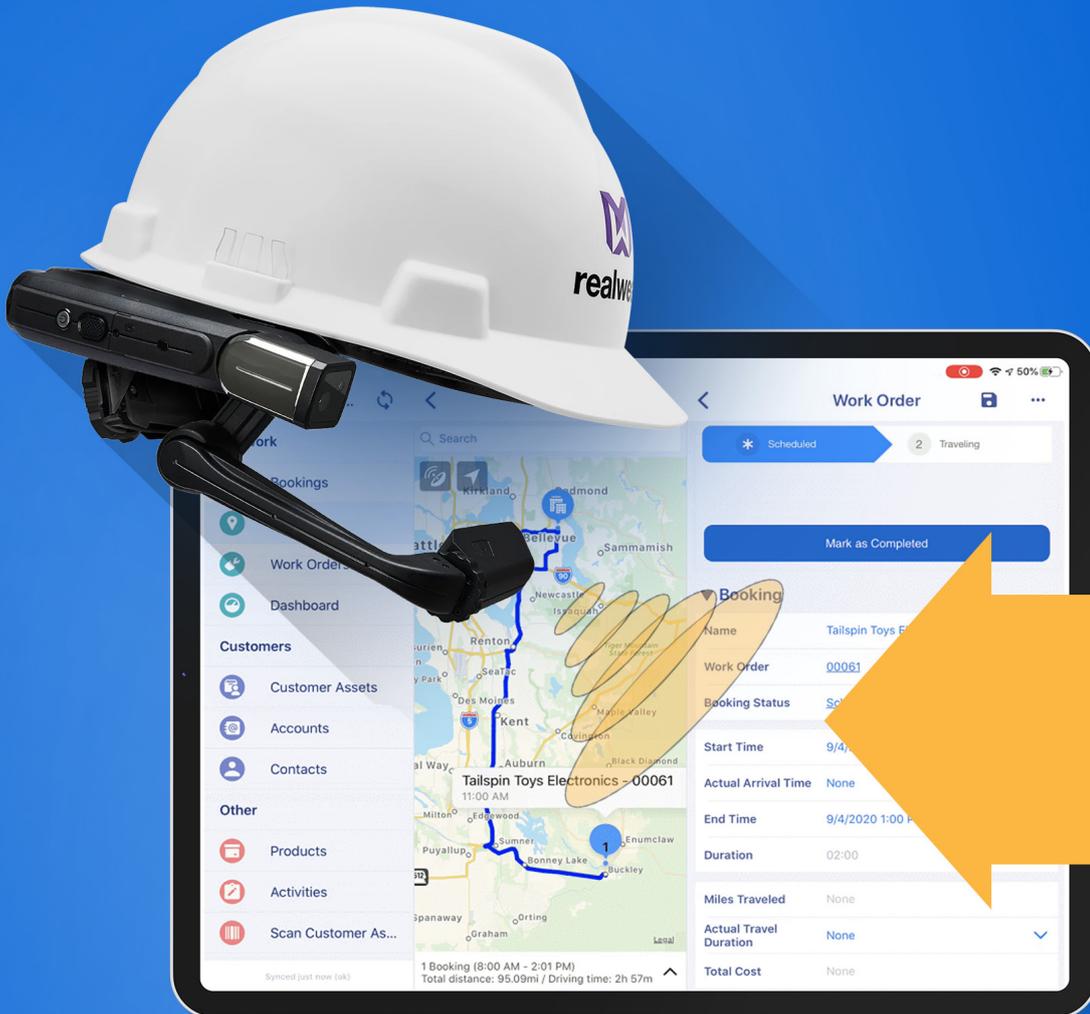


Resco Field Service 2.0 for Dynamics 365 Transition Guide

Moving from the Field Service Mobile
(Xamarin) app to Resco Field Service 2.0



Terms used in this guide



Field Service Mobile

In this document also referred to as the Xamarin app

- Built on Resco technology (limited)
- Developed, published and maintained by Microsoft
- End of life: June 2022



Field Service (Dynamics 365)

In this document also referred to as the D365 app

- Built on Power Apps technology
- Developed, published and maintained by Microsoft



Resco Mobile CRM

In this document also referred to as the Resco Field Service 2.0 app

- Built on Resco technology (full)
- Developed, published and maintained by Resco
- Enables all Resco Field Service 2.0 mobile capabilities



Woodford

Browser-based configuration tool for building and managing mobile [app projects](#) using the [Resco platform](#). It also allows you to manage connected mobile devices and licenses



Mobile app project

- Customization file for the Xamarin and Resco Mobile CRM app dedicated to a particular set of users
- Each app project may contain a different set of data, UI, and features, according to your company's needs

Purpose of the document

This document is intended to help Dynamics 365 Field Service customers and integration partners, consultants, and IT professionals assess, plan, and execute the adoption of Resco Field Service 2.0.

You will learn about:

- Mobile options for Dynamics 365 Field service customers and partners
- The transition from the current, Resco-based, Field Service Mobile app (so-called “Xamarin app”) to an officially licensed Resco Field Service 2.0 app (listed as Resco Mobile CRM in app stores)
- Achieving business continuity and unlocking advanced mobile capabilities with Resco Field Service 2.0

What’s going on with mobility for Dynamics 365 Field Service?

Resco has been filling the mobile gap for Dynamics 365 Field Service since 2015.

Microsoft’s Xamarin app is built on Resco and included with every Field Service license since 2018.

The Xamarin app will be discontinued by Microsoft on **June 30, 2022 and replaced by the D365 app.**

In June 2020, Resco has launched its Resco Field Service 2.0 program, to enable business continuity for companies relying on Resco technology.

Dynamics 365 Field Service customers currently using the Xamarin app have two options:

- Transition to Resco’s Field Service 2.0 app and continue using their current mobile setup with additional benefits and capabilities
- Adopt the new Power Apps-based D365 app from Microsoft, starting from scratch with a different mobile technology

Timeline



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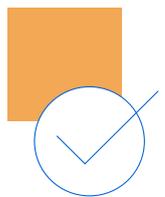
What is Resco Field Service 2.0?

Resco Field Service 2.0 offers Dynamics 365 customers an alternative if they do not want to adopt the D365 app. It enables continuity in your field service operations. You don't need to move to a different technology, switch tools, and fundamentally change your field service mobility setup. Continue working with Woodford and other Resco admin tools you know and love.

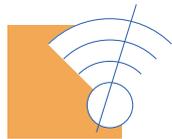
Unlock all options of Resco's technology not available in the Xamarin and D365 app.

Key advantages

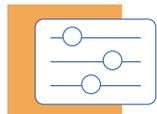
In addition to capabilities available in the Xamarin app, with Resco Field Service 2.0 you can utilize:



Resco Inspections - build and use dynamic forms for rapid data collection and evaluation



Market-leading offline mode and extensive synchronization possibilities



Tailored branding across the entire app



Ability to **create and generate custom reports** directly on mobile devices



Voice-operated RealWear devices

Why transition to Resco Field Service 2.0?

Costs of moving to the D365 app can be significant:

- Having invested significant amount of time and money into your business needs to user scenarios, transitioning to the D365 app requires serious analysis and evaluation. Can everything you already have in place be achieved on an entirely different technology?

Work and energy put into fine-tuning the Xamarin app is not get lost moving to Resco Field Service 2.0

- Even if required capabilities could be achieved on the D365 app, customizing from scratch, setting up offline profiles, creating forms and views, programming report templates, and more will be necessary. With Resco you can effortlessly migrate your entire Xamarin app project to the Resco Field Service 2.0 app.

Extend field service functionality with advanced mobile capabilities.

Resco has committed to pioneer field service productivity. Check out the Resco Field Service 2.0 roadmap [here](#).



What does the transition entail?

- Switching apps – you need to start using Resco Mobile CRM (referred to as the Resco Field Service 2.0 app in this document) instead of Microsoft's Field Service Mobile (referred to as the Xamarin app in this document).
- App projects and configurations created for the Xamarin app will work in Resco Mobile CRM seamlessly.
- Requires additional Resco Field Service 2.0 licenses available at a fair price. Talk to your implementation partner or a Resco account manager for more details.

Basic tech details

The Xamarin app and Resco Field Service 2.0 app are based on the same Resco technology.

The Xamarin app is based on an older release of Resco's technology but that should not cause any issues when migrating to the Resco Field Service 2.0 app.

Both apps work on the same principle - they are based on app projects that define how each app works, looks, and handles synchronized data.

You can simply move your customized and configured app project from the Xamarin app to the Resco Field Service 2.0 app. This means there is **no work necessary to adjust app projects when making the switch**.

How Resco Mobile CRM customizations work



Transition – existing customers

Prerequisites

You are a Dynamics 365 Field Service customer.

You are already using the out-of-the-box or customized app project with the Xamarin app, or you are in the process of customization and rollout.

Overview of the transition process

1. As stated earlier, your existing app projects used with the Xamarin app will also work in the Resco Field Service 2.0 app – no changes needed
2. Pick a transition approach
3. Test your app project used in the Xamarin app with the Resco Field Service 2.0 app
4. Based on your chosen transition approach, perform corresponding steps

Choose your transition approach

There are two standard transition approaches

Gradual switch

Select and switch one mobile user group first, then the rest

Immediate switch

Rollout to all mobile users at once

When to use each approach?

- | | |
|---|--|
| <ul style="list-style-type: none"> • You plan to use features not available in Microsoft's Xamarin app that may require training, e.g. Resco Inspections etc. • You want to change or modify the appearance of the app (make UI customizations) | <ul style="list-style-type: none"> • You plan no significant changes and no new features to add to your app projects • You do not foresee any issues and want a quick transition |
|---|--|

Test your app project with the Field Service 2.0 app

1. Download Resco Mobile CRM from app stores:
[Google Play](#)  | [Apple App Store](#) iOS | [Microsoft Store](#) 
2. Assign yourself a security role for the app project you want to try out (if you have several projects, this step needs to be repeated for each).
3. Log in to Resco Mobile CRM using your Microsoft Dynamics credentials.
4. Try whether everything works as expected.
5. In case something does not work as it is supposed to, please contact [Resco's Support team](#).
6. Start adding advanced Resco Field Service 2.0 features and capabilities.

Gradual switch – specific mobile user group first

A pilot project before rolling out the Field Service 2.0 app (Resco Mobile CRM) to the entire company is recommended if you plan to use additional features that Resco Field Service 2.0 enables:

- Think about the scenarios where you plan to apply new technologies and processes
- Explain the value of the new capabilities to your mobile users
- Add the functionality to your app project and roll it out to the selected user group
- Set up a feedback channel so you can learn and adjust your app based on users' experience

Learn more about solutions available in Resco Field Service 2.0:

- [Resco Inspections](#)
- [Location Monitor](#)

Gradual switch – pilot project

- ▶ Select willing and seasoned mobile users who will test the app and provide feedback.
- ▶ Create adoption and training materials before you start the pilot.
- ▶ Learn from the pilot users' feedback and use that information in the next rollout phases.
- ▶ Have a regular and easy to contribute feedback channels to address issues and adjust your app project based on real-world testing.
- ▶ Ensure that all your field service job execution scenarios are covered.

Gradual switch – user acceptance testing

- You may wish to include this phase if you plan to incorporate advanced Resco Field Service 2.0 functionality not available in Microsoft's Xamarin app.
- Adding new features into your field scenarios may require user onboarding and training.
- Determine a set of sample scenarios for users to go through.
- Evaluate and remove any roadblocks uncovered throughout testing before moving to a widespread rollout.

Gradual switch – production

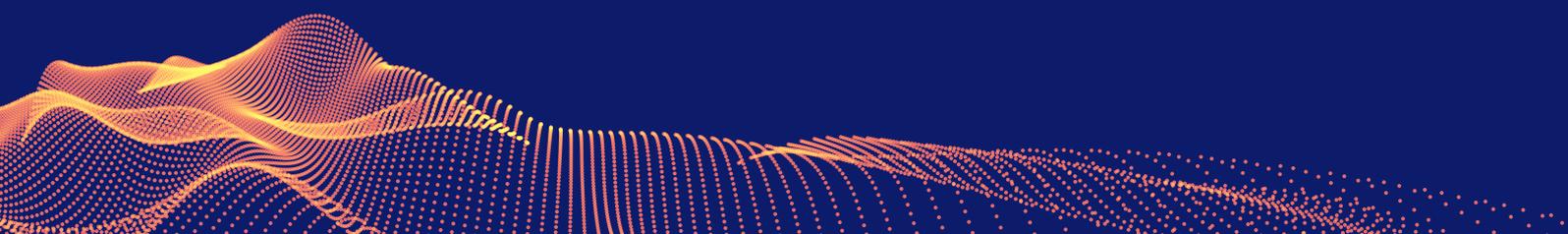
Plan the widespread rollout and determine specific dates.

Communicate:

- Announce the schedule, explain changes, and ensure support and availability of your IT department

Complete the rollout:

- Smaller businesses with fewer customizations might move to production faster
- Larger organizations can also opt for incremental rollout by business units, geographic locations, or any other parameter. Every company is different and requires a tailored approach



Immediate switch

Recommended when you are confident after initial testing of your Xamarin app project in the Resco Field Service 2.0 app

Recommended when you do not plan to introduce additional capabilities that enable new ways of working and new processes, as these may require training and other related activities.

Immediate switch

– test your app project with the Resco Field Service 2.0 app

- 1 Download Resco Mobile CRM from app stores:
[Google Play](#)  | [Apple App Store](#) iOS | [Microsoft Store](#) 
- 2 Assign yourself a security role for the app project you want to try out (if you have several project, this step needs to be repeated for each).
- 3 Log in to Resco Mobile CRM using your Microsoft Dynamics credentials.
- 4 Try whether everything works as expected.
- 5 In case something does not work as it is supposed to, please contact [Resco's Support team](#).
- 6 Start adding advanced Resco Field Service 2.0 features and capabilities.

Immediate switch – production

Plan the rollout and determine specific dates.

Communicate:

- Announce the schedule and ensure support and availability of your IT department

Execute the rollout

- Distribute the Resco Mobile CRM app to your field staff's devices with login instructions

Additional considerations

If you are using **Microsoft Inspection** and want to replace the functionality with Resco Inspections:

- The forms will need to be redesigned using Resco Inspections' form designer tool (Questionnaire Designer)
- The data structure and nature of the tools is different
- Exporting Microsoft Inspection forms and importing them into Resco tool is currently not possible

Enrich your app project

If you like the looks of the default Resco Field Service 2.0 app project, you can make simple configuration tweaks to your existing project to make it similar:

- [Enable Resco Inspections](#)
- [How to create questionnaires \(dynamic forms\)](#)
- [Enable Location Tracking](#)
- Use Resco Field Service 2.0 theme colors

Transition - new customers

When should you consider Resco Field Service 2.0

You are implementing Dynamics 365 Field Service or evaluating field service management solutions (you can only choose between the Resco Field Service 2.0 and D365 app, Xamarin app not available for new customers).

Your scenario involves filling out significant amounts of dynamic forms.

Your field service technicians depend on reliable offline capabilities with granular synchronization requirements.

You handle complex field service job execution scenarios.

You need to generate custom reports on the go, that will match your report template standards.

Overview of the adoption process

- 1 Map out your mobile needs based on your field service scenarios
- 2 Evaluate how well can they be supported by the D3655 app vs. Resco Field Service 2.0 app
- 3 If you decide for Resco Field Service 2.0, get familiar with the Resco technology via our [documentation](#) and [Academy](#)
- 4 Decide on the mobile rollout approach—gradual or immediate
- 5 Translate your mobile needs into app project features and capabilities
- 6 Further steps will be based on your rollout approach, but will include: creating a sandbox environment; creating an app project and trying it; testing with your pilot user group; adjusting based on feedback; training and rollout

You can get help regarding each phase from your software implementation partner or directly from Resco. Simply drop us a line at fieldservice@resco.net or visit the official [Resco Field Service 2.0 product page](#).

Feel free
to reach out to us at
fieldservice@resco.net
if you have any questions
about the transition.

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 @RescoMobileCRM

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