

MB-240T00 - A: Dynamics 365 Field Service

Course Summary

Description

Dynamics 365 Field Service helps organizations better position themselves in the market by providing a variety of tools that assist in identifying and scheduling resources and managing workloads for mobile workers. This course will equip students with the skills necessary to identify and configure the key components that are used to deliver Field Service and mobile solutions. Key topics include identifying the organizational considerations that will drive configuration decisions and common configuration aspects. This course helps students better understand the bigger picture and end goals focused around implementations that aid in designing more efficient solutions that align with customer and organizational goals.

Objectives

After taking this course, students will be able to:

- Identify the key components involved in Field Service Implementations.
- Define the products and services that will be delivered to customers.
- Determine which pricing options to use in specific scenarios.
- Determine which resources are required.

Topics

- Configure Field Service
- Resource scheduling configuration
- Defining and configuring bookable resources
- Configuring incidents
- Inventory and Work Order Management
- Field Service Agreements
- Inventory and Purchasing
- Field Service Mobile
- Universal Resource Scheduling
- Managing scheduling options
- Customizing the Schedule Board
- Advanced Scheduling Options

Audience

This course is designed for IT professionals with experience or interest in delivering Field Service solutions for large-scale customers.

Prerequisites

A basic understanding of Dynamics 365 features, functionality, and navigation

Duration

Three Days

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Course Outline

I. *Configure Field Service*

- A. Introduction to field service
- B. Defining products and services
- C. Defining tax codes

II. *Resource scheduling configuration*

- A. Mapping and location information
- B. Configuring resource components
- C. Defining account preferences

III. *Defining and configuring bookable resources*

- A. Defining bookable resources
- B. Resource pools, crews and facilities

IV. *Configuring Incidents*

- A. Creating incidents
- B. Using service tasks

V. *Inventory and work Order Management*

- A. Configure field service work orders
- B. Creating work orders
- C. Managing work orders

VI. *Field Service Agreements*

- A. Using field service agreements
- B. Set up bookings
- C. Set up invoices

VII. *Inventory and Purchasing*

- A. Manage customer assets
- B. Manage inventory
- C. Purchasing and returns

VIII. *Field Service Mobile*

- A. Field Service Mobile Application overview
- B. Install and deploy Field Service Mobile Projects
- C. Manage Mobile Projects
- D. Deploy the Mobile client

IX. *Universal Resource Scheduling*

- A. URS overview and configuration
- B. Enabling entities for URS
- C. Entity customization and automation considerations

X. *Managing scheduling options*

- A. Using the Schedule Board
- B. Scheduling items
- C. Rescheduling and substituting resources
- D. Crew and resource pool scheduling

XI. *Customizing the Schedule Board*

- A. Configure the schedule board
- B. Create additional schedule boards
- C. Leverage Dynamics 365 views with the schedule board
- D. Configure schedule board queries and filters
- E. Working with requirement groups

XII. *Advanced Scheduling Options*

- A. Working with resource scheduling optimization
- B. Defining optimization goals
- C. Defining optimization scopes
- D. Defining optimization profiles
- E. Single resource scheduling