

MB-240 Microsoft Dynamics 365 Field Service



Microsoft Business Applications

Instructor-Led Virtual Courses

 365 Talent Portal

Microsoft Learning Partner

5 half days – 20 hours in total

About This Course

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.

Audience Profile

Microsoft Dynamics 365 Customer Engagement Functional Consultants, Solution Architects and Business Analysts who are looking to learn about the Field Service module of Microsoft Dynamics 365 and/or to take the MB-240 certification exam.

Prerequisites

Prior knowledge of Microsoft Dynamics 365 or CRM systems.

At Course Completion

After completing this course, you 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.

Course Agenda

Module 1: Configure Field Service

In this introductory module, we will introduce key concepts of Dynamics 365 Field Service, including products, services, and tax codes.

Lessons

- Introduction to configuring Field Service
- Defining products and services
- Defining tax codes

you will be able to:

- Create and manage products and services
- Configure tax codes for your organization

Module 2: Resource Scheduling Configuration

In this module, we will explore the concept of resource scheduling, and learn how to configure the system to schedule resources efficiently.

Lessons

- Mapping and location information
- Configuring resource components
- Defining account preferences

you will be able to:

- Configure resource scheduling for your organization
- Define account preferences
- Enable location mapping

Module 3: Defining and Configuring Bookable Resources

In this module, we will learn how to create and manage bookable resources, including resource pools and crews.

Lessons

- Defining bookable resources
- Resource pools, crews and facilities

you will be able to:

- Define bookable resources
- Create pools and crews
- Manage facility records

Module 4: Configure Incidents

In this module, we will learn how incidents can improve the scheduling efficiency and consistency of your organization.

Lessons

- Creating an incident
- Using service tasks

you will be able to:

- Create an incident for common service tasks
- Schedule using incidents

Module 5: Inventory and Work Order Management

In this module, we will learn how to create and use work orders to schedule resources.

Lessons

- Configure Field Service work orders
- Creating work orders
- Managing work orders

you will be able to:

- Configure work orders
- Schedule resources using work orders

Module 6: Field Service Agreements

In this module, we will introduce agreements, and learn how to configure them for your organization.

Lessons

- Using Field Service agreements
- Set up bookings
- Set up invoices

you will be able to:

- Use an agreement to schedule work orders
- Generate invoices for customers

Module 7: Inventory and Purchasing

In this module, we will learn about management of customer assets.

Lessons

- Manage customer assets
- Manage inventory
- Purchasing and returns

you will be able to:

- Create customer asset records
- Manage inventory, purchasing and returns

Module 8: Field Service Mobile

In this module, we will learn how to use and configure the Field Service Mobile application for a mobile workforce.

Lessons

- Mobile client overview
- Install and deploy Field Service mobile projects

- Manage mobile projects
- Deploy the mobile client

you will be able to:

- Manage mobile projects
- Install and deploy the mobile client
- Describe the value of the mobile app for a mobile workforce

Module 9: Universal Resource Scheduling

In this module, we will introduce the concept of Universal Resource Scheduling, and describe how it can be leveraged for an organization.

Lessons

- URS overview and configuration
- Enabling entities for URS
- Customize entities for URS

you will be able to:

- Describe Universal Resource Scheduling
- Enable an entity for URS

Module 10: Managing Scheduling Options

In this module, we will learn how to use the schedule board to reschedule, substitute resources, and schedule pools and crews.

Lessons

- Using the schedule board
- Schedule items
- Rescheduling and substituting resources
- Crew and pool scheduling

you will be able to:

- Configure and use the schedule board to schedule resources
- Reschedule work orders
- Substitute resources

Module 11: Customizing the Schedule Board

In this module, we will learn how to configure the schedule board to best meet the organization or scheduler's needs.

Lessons

- Configure the board
- Create additional schedule boards
- Use views to enhance the schedule board
- Configuring schedule board queries and filters
- Working with requirement groups

you will be able to:

- Customize the schedule board
- Create additional boards

- Add views to a schedule board

Module 12: Advanced Scheduling Options

In this module, we will dive deeper into the options for customizing the scheduling of work orders based on unique business requirements.

Lessons

- Working with resource scheduling optimization
- Defining optimization goals
- Defining optimization scopes
- Defining optimization profiles
- Single resource scheduling

you will be able to:

- Define optimization for an organization
- Schedule single resources

To register, please contact us on training@365talentportal.com