

Microsoft Dynamics 365 for Field Service

Duration: 4 Days **Course Code: M-MB240** **Delivery Method: Company Event**

Overview:

Learn how to effectively configure a Dynamics 365 for Field Service implementation to maximize the tools and features available to efficiently manage a mobile work force.

Company Events

These events can be delivered exclusively for your company at our locations or yours, specifically for your delegates and your needs. The Company Events can be tailored or standard course deliveries.

Target Audience:

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

Prerequisites:

- Target Audience should have a basic understanding of how to navigate the Dynamics 365 application.
- A basic overview understanding of what the Field Service application is and used for is also helpful.

Content:

Configure Microsoft Dynamics 365 Field Service

- key Field Service configuration considerations
- Define Field Service products and services
- Work with work order types, territories, and status settings
- Resolutions
- Define incident and service task types
- Define account preferences
- Exercise - Configure Field Service settings
- Check your knowledge
- Summary

Configure bookable resources in Dynamics 365 Field Service

- Overview of bookable resources
- Setup and configuration
- Define bookable resources
- Work with crews, facilities, and pools
- Configure entities for URS
- Exercise - Set up and configure bookable resources
- Check your knowledge
- Summary

Schedule crews, facilities, and resource pooling in Dynamics 365 Field Service

- Schedule multiple resources and facilities
- Define resources
- Work with fulfillment preferences
- Work with requirement groups
- Crew facility resource pool scheduling
- Exercise - Schedule multiple resources
- Check your knowledge
- Summary

Work order management, agreements, inventory, and purchasing in Dynamics 365 Field Service

- Overview of the Field Service work order lifecycle
- Create and define work orders
- Work with work order-related records
- Exercise - Create work orders
- Entitlement
- Work with agreements
- Service level agreements (SLAs) for work orders
- Work with inventory and warehouses
- Check your knowledge
- Summary

Incident types in Dynamics 365 Field Service

- Introduction
- Define incident types
- Create incident types
- Use incident types

Manage scheduling options in Dynamics 365 for Field Service

- Overview of scheduling capabilities
- Overview of the schedule board
- Schedule and reschedule
- Reschedule and move items
- Exercise - Schedule items
- Check your knowledge
- Summary

Customize the schedule board in Dynamics 365 Field Service

- Work with multiple schedule boards
- Schedule Board options
- Design and use views with the Schedule Board
- Configure schedule board filter queries
- Exercise - Customize the Schedule Board
- Check your knowledge
- Summary

Deploying Resource Scheduling Optimization

- Resource Scheduling Optimization overview
- Setup and deployment options
- RSO configuration options
- Define optimization goals
- Define optimization scopes
- Define optimization schedules
- Check your knowledge
- Summary

Get started with the Dynamics 365 Field Service Mobile application

- Introduction
- Deploy the mobile application
- Work with the mobile application
- Service customer assets
- Work offline and update offline data
- More mobile application capabilities
- Check your knowledge
- Summary

Customize and configure the Dynamics 365 Field Service Mobile application

- Introduction
- Edit the mobile application
- Offline configuration
- Barcode scanning and global search
- Audit locations
- Configure push notifications
- Check your knowledge
- Summary

Integrate Dynamics 365 Remote Assist with Dynamics 365 Field Service

Customer assets in Dynamics 365 Field Service

- Introduction
- Create customer assets
- Associate customer assets
- Set up customer asset hierarchies
- Use functional locations
- Check your knowledge
- Summary

Set up Field Service to create work orders from IoT data

- Introduction
- Installation and setup
- Configure Connected Field Service
- Device data
- Visualize device readings
- IoT alerts
- Mobile app
- Check your knowledge
- Summary

Create custom apps for Dynamics 365 Field Service

- Introduction
- Create apps from Power Apps
- Deploy the customer experiences portal
- Customize Dynamics 365 Field Service
- Universal Resource Scheduling
- Set up and customize schedule boards
- Check your knowledge
- Summary

Gather customer feedback with Dynamics 365 Customer Voice

- Introduction
- Create a project by using the support template
- Customize email templates with survey variables
- Configure Power Automate to send surveys after a case is resolved
- Create surveys for omnichannel surveys and satisfaction metrics
- Set up post chat surveys
- Exercise - Customize email templates with survey variables
- Check your knowledge
- Summary

- Check your knowledge
- Summary

Inspections in Dynamics 365 Field Service

- Introduction
- Create inspections
- Associate inspections
- Perform inspections
- Check your knowledge
- Summary

- Introduction
- Application setup and user configuration
- Make Remote Assist calls for Field Service work orders
- Make Remote Assist calls
- Use Field Service bookings on a HoloLens device
- Check your knowledge
- Summary

Further Information:

For More information, or to book your course, please call us on 00 971 4 446 4987

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