
Microsoft Dynamics 365 for Field Service

Duration: 3 Days **Course Code: M-MB240**

Overview:

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.

Target Audience:

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

Objectives:

- After completing this course, you will be able to:
 - Determine which pricing options to use in specific scenarios.
 - Identify the key components involved in Field Service Implementations.
 - Determine which resources are required.
 - Define the products and services that will be delivered to customers.
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Prerequisites:

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Content:

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.

- Introduction to configuring Field Service
- Defining products and services

- 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.

- Mapping and location information
- Configuring resource components

- 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.

- Defining bookable resources

- 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.

- Creating an incident

- 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.

- Configure Field Service work orders
- Creating work orders

- 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.

- Using Field Service agreements
- Set up bookings

- 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.

- Manage customer assets
- Manage inventory

- 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.

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

- 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.

- URS overview and configuration
- Enabling entities for URS

- 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.

- Using the schedule board
- Schedule items
- Rescheduling and substituting resources

- 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.

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

- 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.

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

- Define optimization for an organization
 - Schedule single resources
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Further Information:

For More information, or to book your course, please call us on 0800/84.009

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