

Microsoft Dynamics 365 for Field Service

Duración: 3 Días Código del Curso: M-MB240

Temario:

Dynamics 365 for 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.

Many organizations rely on mobile work forces to deliver their products and services to their customers. Dynamics 365 for Field Service helps organizations better position themselves in the market by providing a variety of tools that assist in efficiently identifying and scheduling resources as well as assisting in managing workloads for mobile workers.

This course will equip students with the skills necessary to execute, identify and configure the key components that are used to deliver Field Service and mobile solutions. Key topics include identifying what a typical work order lifecycle looks like as well as the organizational considerations that will drive configuration decisions. Additionally, this course will focus on components that are commonly used in relation to work orders including agreements, inventory components, purchasing, and mobility strategies.

This course helps students better understand the bigger picture and end goals focused around work order delivery and execution that aid in designing more efficient solutions that align with customer and organizational goals.

Any organization that requires resources to execute services needs to efficiently be able to identify and schedule based on requirements defined by organizational needs. Dynamics 365's Universal Resource Scheduling solution enables organizations more effectively manage and schedule these resources by providing a configurable toolset.

This course will equip students with the skills necessary to configure and consume the tools available to more efficiently manage organizational resources. Key topics include identifying where to begin and as well as the organizational considerations that will drive resource scheduling decisions. A primary focus will be on how to best leverage the tools that are available to locate and schedule resources such as using the schedule board and the schedule assistant. Additionally, we will examine customization scenarios such as enabling items for scheduling, defining schedule board options, working with multiple schedule boards, and extending the core scheduling functionality.

This course helps students better understand what is important to organizations when scheduling resources and focuses on implementation considerations that aid in designing more efficient solutions that align with customer and organizational goals.

Objetivos:

■ After completing this course, you will be able to:

■ M-MB240T01

■ 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.

■ Configure the system to support resource needs.

■ Define commonly reported issues and template them for easier consumption.

■ M-MB240T02

■ Identify the key areas involved in a work order lifecycle.

■ Generate agreements that can be used to automatically create work orders.

■ Leverage the inventory management capabilities of Dynamics 365 for Field Service.

■ Create and work Purchase Orders through their lifecycle.

■ Deploy and Configure the Field Service Mobile Application.

■ M-MB240T03

■ Identify the core components used to schedule items.

■ Configure the application to best leverage the scheduling features.

■ Leverage scheduling features to locate and schedule resources for work.

■ Tailor the application to best represent organizational needs.

■ Develop solutions that can be used to schedule single or multiple resources.

■ Identify the extension options available as part of Universal Resource Scheduling.

Prerequisites:



Contenido:

M-MB240T01

Module 1: Configure Field Service

Lessons

- Introduction to field service
- Defining products and services
- Defining tax codes
- Mapping and location information
- Configuring resource components
- Defining account preferences
- Defining bookable resources
- Resource pools, crews and facilities
- Creating incidents
- Using service tasks
- Defining products, services and skills
- Configure field service work orders
- Creating work orders
- Managing work orders
- Using field service agreements
- Set up bookings
- Set up invoices
- Manage customer assets
- Manage inventory
- Purchasing and returns
- Field Service Mobile Application overview
- Install and deploy Field Service Mobile Projects
- Manage Mobile Projects
- Deploy the Mobile client
- URS overview and configuration
- Enabling entities for URS
- Entity customization and automation considerations
- Using the Schedule Board
- Scheduling items
- Rescheduling and substituting resources
- Crew and resource pool scheduling
- Configure the schedule board
- Create additional schedule boards
- Leverage Dynamics 365 views with the schedule board
- Configure schedule board queries and filters
- Working with requirement groups
- Resource Scheduling Optimization overview
- Defining optimization goals
- Defining optimization scopes
- Defining optimization profiles

Module 2: Resource scheduling configuration

Lessons

- Introduction to field service
- Defining products and services
- Defining tax codes
- Mapping and location information
- Configuring resource components
- Defining account preferences

M-MB240T02

Module 1: Field Service Work Orders

Lessons

- Introduction to field service
- Defining products and services
- Defining tax codes
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- Defining bookable resources
- Resource pools, crews and facilities
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Module 2: Field Service Agreements

Lessons

- Introduction to field service
- Defining products and services
- Defining tax codes
- Mapping and location information

M-MB240T03

Module 1: Universal Resource Scheduling

Lessons

- Introduction to field service
- Defining products and services
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Module 2: Managing scheduling options

Lessons

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Module 3: Defining and configuring bookable resources

Lessons

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Module 3: Inventory and Purchasing

Lessons

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Module 3: Customizing the Schedule Board

Lessons

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Module 4: Working with and configuring incidents

Lessons

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Module 4: Field Service Mobile

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Module 4: Resource Scheduling Optimization

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Más información:

Para más información o para reservar tu plaza llámanos al (34) 91 425 06 60

info.cursos@globalknowledge.es

www.globalknowledge.com/es-es/

Global Knowledge Network Spain, C/ Retama 7, 6ª planta, 28045 Madrid