
Microsoft Dynamics 365 for Field Service

Duration: 4 Days **Course Code: M-MB240**

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.

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.
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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 00 966 92000 9278

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