



# Microsoft Dynamics 365 Field Services (MB-240T00)

## COURSE 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.

## WHO WILL BENEFIT FROM THIS COURSE?

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

## COURSE OBJECTIVES

Students will learn to:

- Configure Microsoft Dynamics 365 Field Service
- Configure bookable resources in Dynamics 365 Field Service
- Schedule crews, facilities, and resource pooling in Dynamics 365 Field Service
- Work order management in Dynamics 365 Field Service
- Incident types in Dynamics 365 Field Service
- Inspections in Dynamics 365 Field Service
- Manage scheduling options in Dynamics 365 for Field Service
- Customize the schedule board in Dynamics 365 Field Service
- Deploying Resource Scheduling Optimization
- Get started with the Dynamics 365 Field Service Mobile application
- Customize and configure the Dynamics 365 Field Service Mobile application
- Integrate Dynamics 365 Remote Assist with Dynamics 365 Field Service
- Customer assets in Dynamics 365 Field Service
- Set up Field Service to create work orders from IoT data
- Create custom apps for Dynamics 365 Field Service
- Gather customer feedback with Dynamics 365 Customer Voice

## COURSE OUTLINE

Module 1: Configure Microsoft Dynamics 365 Field Service

- Identify key service configuration considerations
- Users and security roles
- Define work order types, statuses and sub statuses
- Define incident and service task types
- Define Field Service products, services, and pricing options
- Define service territories
- Configure Field Service account preferences



#### Module 2: Configure bookable resources in Dynamics 365 Field Service

- Identify the different types of resources available
- Define supporting resource components such as characteristics, roles, and organizational units
- Setup an individual bookable resource
- Geocode resources, starting and ending locations, and viewing in the map
- Define pools, crews, and facilities

#### Module 3: Schedule crews, facilities, and resource pooling in Dynamics 365 Field Service

- Define and use resource pools in scheduling scenarios
- Use the facility scheduling feature to book specific facilities for work
- Define and schedule crews using the schedule board

#### Module 4: Work order management in Dynamics 365 Field Service

- Identify the work order lifecycle
- Identify the different options available for creating work orders
- Use related records such as service accounts, incidents, products and services, and other items with work orders
- Apply entitlements
- Create and manage agreements
- Create and manage service level agreements (SLAs) for work orders
- Define and manage inventory and warehouses

#### Module 5: Incident types in Dynamics 365 Field Service

- Learn about the purpose of incident types in Dynamics 365 Field Service.
- Learn how to create incident types.
- Create service tasks and use them in an incident type.
- Add products and services to an incident type.
- Define the duration of an incident type.
- Use incident types on work orders.

#### Module 6: Inspections in Dynamics 365 Field Service

- Learn about the purpose of inspections in Dynamics 365 Field Service.
- Learn how to create inspections.
- Associate inspections with work orders and customer assets.
- Perform inspections by using the Field Service mobile app.

#### Module 7: Manage scheduling options in Dynamics 365 for Field Service

- Identify scenarios where the different field service scheduling options could be used
- Navigate, filter, and modify basic schedule board settings
- Manually schedule and reschedule items on the schedule board
- Use the resource availability search (schedule assistant) to schedule items on the schedule board

#### Module 8: Customize the schedule board in Dynamics 365 Field Service

- Define each pane in schedule board
- Edit schedule board views and tooltips
- Edit map pane

- Schedule board alerts
- Extend schedule board with JavaScript and HTML

#### Module 9: Deploying Resource Scheduling Optimization

- Set up and deploy Resource Scheduling Optimization.
- Learn about the configuration options and define optimization goals, scopes, and schedules.

#### Module 10: Get started with the Dynamics 365 Field Service Mobile application

- Learn how to deploy and use the mobile application.
- Learn about Service assets.
- Use online and offline data.

#### Module 11: Customize and configure the Dynamics 365 Field Service Mobile application

- Customize and edit the mobile application.
- Configure offline data and barcodes.
- Enable location tracking and push notifications.

#### Module 12: Integrate Dynamics 365 Remote Assist with Dynamics 365 Field Service

- Launch Remote Assist mobile from a booking.
- Review relevant work order information.
- Post call information.

#### Module 13: Customer assets in Dynamics 365 Field Service

- Discover the purpose of customer assets in Field Service.
- Learn how to create customer assets.
- Learn how to associate customer assets with work orders.
- Learn how to configure customer asset hierarchies.
- Learn how to use functional locations.

#### Module 14: Set up Field Service to create work orders from IoT data

- Learn about the installation and setup of Connected Field Service.
- Read device data.
- Set device alerts.
- Learn about using the mobile app.

#### Module 15: Create custom apps for Dynamics 365 Field Service

- Learn how to use Microsoft Power Platform to customize Dynamics 365 Field Service.
- Learn how to create Microsoft Power Apps applications for Dynamics 365 Field Service.
- Learn how to deploy the customer experiences homepages portal for Field Service.
- Discover how to customize Field Service.
- Learn how to set up and customize schedule boards.
- Learn how to enable a custom table for scheduling.

#### Module 16: Gather customer feedback with Dynamics 365 Customer Voice

- Learn how to improve relationships with your customers by reviewing feedback data.
- Learn how to use templates in Customer Voice to create projects, surveys, and emails.
- Discover how to collect feedback by using Microsoft Power Automate, Omnichannel for Customer Service, and Customer Service Insights.
- Find out how to use Customer Voice to understand your clients' needs and requirements.

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