

MS-MB240T00: MICROSOFT DYNAMICS 365 FIELD SERVICE



DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
4 Days	Intermediate	Dynamics 365	Instructor-led	NA

INTRODUCTION

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.

AUDIENCE PROFILE

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

COURSE CONTENT

Module 1: Configure Microsoft Dynamics 365 Field Service

One of the main advantages to Dynamics 365 Field Service is the ability to configure it based on your organization needs. This might include Identifying key configuration considerations, defining products and services, and other related factors and the defining the necessary Work Order Types, sub-statuses, service territories, and account configuration that will support the desired Functionality.

Learning objectives

In this module, you will:

- 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

This module will focus on how bookable resources are used in universal resource scheduling. Configuring resources, working with bookable resources, setup of supporting components such as

characteristics and roles, and working with facilities, crews, and resource pools is also covered.

Learning objectives

In this module, you will:

- 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

Handle more advanced scheduling options that might involve multiple resources, or specific facilities. Use resource pooling to provide place holders for scheduling groups of resources. Schedule crews to work on specific items. Schedule specific facilities that might be used to help deliver a specific service.

Learning objectives

In this module, you will:

- 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, agreements,

inventory, and purchasing in Dynamics 365 Field Service

Leverage agreements to assist in creating Work Orders on a predefined schedule such as in preventative maintenance scenarios. Additionally, by leveraging inventory, they can more effectively manage inventory levels at warehouses and ensure that technicians have what they need to deliver services to their customer while in the field. Dynamics 365 has several foundational elements that can be configured to better tailor a Field Service implementation to meet the desired needs of an organization.

Learning objectives

In this module, you will:

- 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
- Create and manage agreements
- Define and manage inventory and warehouses

Module 5: Incident types in Dynamics 365 Field Service

Define and create incident types to use as templates when you are creating work orders in Dynamics 365 Field Service.

Learning objectives

In this module, you will:

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 how to create and perform inspections in Dynamics 365 Field Service.

Learning objectives

In this module, you will:

- 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

Dispatchers and schedulers need to easily identify and schedule resources to work on jobs. They should be able to identify which scheduling method will best be used based on the scenario that they are trying to schedule. When scenarios arise that require assistance, dispatchers can use the schedule assistant to provide recommendations based on requirements that are defined for the job. Many times, items that are scheduled will need to be rescheduled or assigned to a different resource. With Dynamics 365, schedule board dispatchers can easily identify which items need to be rescheduled and either reschedule them or rebook them to a different resource.

Learning objectives

In this module, you will:

- 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

Tailoring the schedule board for easier scheduling is made possible with multiple schedule boards, views, and schedule board options. We'll look at how we configure the filters, queries, and entities for use with the schedule board.

Learning objectives

In this module, you will:

- 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

Learn how to setup and deploy Resource Scheduling Optimization in this module. Topics include configuration options, defining optimization goals and scope as well as optimizing schedules.

Learning objectives

In this module, you will:

- 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

Dynamics 365 Field Service Mobile application is built on Microsoft Power Platform and provides tools that help frontline workers serve customers in the field. While working in the field, they can access important information such as work orders, customer asset lists, accounts, and contacts.

Learning objectives

In this module, you will:

- 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

Learn how to customize and configure the Dynamics 365 Field Service Mobile application forms, views, and site map.

Learning objectives

In this module, you will:

- 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

Organizations that use Dynamics 365 Field Service to manage work orders can also enable their technicians to make remote assist calls in context of work orders.

Learning objectives

In this module, you will:

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

Module 13: Customer assets in Dynamics 365 Field Service

Learn how to create and associate customer assets with work orders in Dynamics 365 Field Service.

Learning objectives

In this module, you will:

- 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

Connected Field Service for Dynamics 365 integrates IoT devices with Dynamics 365 for Customer Engagement to help organizations create a proactive approach to servicing customers. It enables the registration, monitoring, and management of these devices into your organization's established business processes.

Learning objectives

In this module, you will:

- 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 create custom apps for Dynamics 365 Field Service.

Learning objectives

In this module, you will:

- 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 request and gather customer feedback by using Dynamics 365 Customer Voice.

Learning objectives

In this module, you will:

- 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.

ASSOCIATED CERTIFICATIONS & EXAM

This course will prepare delegates to write the Microsoft MB-240: Microsoft Dynamics 365 Field Service Functional Consultant exam.