

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.

PREREQUISITES

Before attending this course, delegates must have:

- Basic understanding of Dynamics 365 features, functionality, and navigation.
- Familiarity with field service principles, industry terminology, and work order lifecycle processes is beneficial.

COURSE OBJECTIVES

After completion of this course, delegates will be able to:

- Configure field service applications, including work orders, customer assets, and service agreements.
- Schedule and dispatch work orders efficiently using resource pools, crews, and facilities.
- Manage the Field Service mobile app for frontline workers.
- Handle inventory and purchasing through the built-in inventory management system.
- Implement Microsoft Power Platform solutions to enhance field service operations.

COURSE CONTENT

Module 1: Work order management in Dynamics 365 Field Service

Use agreements to help creating Work Orders on a predefined schedule such as in preventative maintenance scenarios. Additionally, by using 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.

Lessons

- Overview of the Field Service work order lifecycle.
- Create and define work orders.
- Work with work order-related records.
- Create work orders with Field Service in Outlook.
- Collaborate on work orders with Microsoft Teams.

- Work with incidents.
- Scheduling considerations.
- Work with inventory and warehouses.
- Customer assets.
- Check your knowledge.
- Summary

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.
- Apply entitlements.
- Create and manage agreements.
- Create and manage service level agreements (SLAs) for work orders.
- Create work orders with Field service in Outlook.
- Define and manage inventory and warehouses.

Module 2: Define agreements in Dynamics 365 Field Service

This module examines the process of creating agreements in Dynamics 365 Field Service.

Lessons

- Introduction.
- Create agreements.
- Booking setups.
- Define a recurrence pattern.
- Define invoices.
- Activate the agreement.
- Check your knowledge.
- Summary.

In this module, you will:

- Learn about creating agreements and booking setups.
- Define a recurrence pattern and invoices.
- Activate agreements.

Module 3: Use service-level agreements and entitlements in Dynamics 365 Field Service

This module examines how to set up service-level agreements and

entitlements in Dynamics 365 Field Service.

Lessons

- Introduction.
- Price lists.
- Create an entitlement.
- Create a work order and add work order products and services.
- Entitlement conflicts.
- Service-level agreements for work orders.
- Create service-level agreements.
- Check your knowledge.
- Summary.

In this module, you will:

- Learn about price lists.
- Create entitlements and work orders.
- Learn about service-level agreements.

Module 4: 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.

Lessons

- Introduction.
- Define incident types.
- Create incident types.
- Use incident types.
- Check your knowledge.
- Summary.
- 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 5: Inspections in Dynamics 365 Field Service

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

Lessons

- Introduction.
- Create inspections.
- Associate inspections.
- Perform inspections.
- Check your knowledge.

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 6: Customer assets in Dynamics 365 Field Service

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

Lessons

- Introduction.
- Create customer assets.
- Associate customer assets.
- Set up customer asset hierarchies.
- Use functional locations.
- Check your knowledge.
- Summary

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 7: Configure bookable resources in Dynamics 365 Field Service

This module focuses on how bookable resources are used in universal resource scheduling.

We also cover configuring resources, working with bookable resources, setup of supporting components such as characteristics and roles, and working with facilities, crews, and resource pools.

Lessons

- Overview of bookable resources.
- Setup and configuration.
- Define bookable resources.
- Work with crews, facilities, and pools.
- Configure entities for URS.
- Check your knowledge.
- Summary.

In this module, you will:

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

Module 8: 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.

Lessons

- Overview of scheduling capabilities.
- Overview of the schedule board.
- Schedule and reschedule.
- Reschedule and move items.
- Check your knowledge.

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 9: 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 will look at how we configure the filters, queries, and entities for use with the schedule board.

Lessons

- 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.

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 10: 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.

Lessons

- Resource Scheduling Optimization overview.
- Setup and deployment options.
- RSO configuration options.
- Define optimization goals.
- Define optimization scopes.
- Define optimization schedules.
- Check your knowledge.

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 11: Use Resource Scheduling Optimization for Dynamics 365 Field Service

This module explains how to work with the schedule board, booking conflicts, and use single resource optimization, and then provides some basic troubleshooting steps.

Lessons

- Resource Scheduling Optimization scenarios.
- Use RSO from the schedule board.
- Work with locked bookings and resolve conflicts.
- Single resource scheduling.
- Troubleshooting tips.
- Check your knowledge.
- Summary.

In this module, you will:

- Learn how to deploy and use the mobile application.
- Resource Scheduling Optimization (RSO) scenarios.
- Using RSO schedule boards.
- Working with locked bookings and resolving conflicts.
- Single resource scheduling and troubleshooting tips.
- Use online and offline data.

Module 12: 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.

Lessons

- Schedule multiple resources and facilities.
- Define resources.
- Work with fulfillment preferences.
- Work with requirement groups.
- Crew facility resource pool scheduling.
- Check your knowledge.
- Summary.

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 13: 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. Configuration options might include Identifying key configuration considerations, defining products and services, and other related factors and the defining the necessary Work Order Types, substatuses, service territories, and account configuration that will support the desired Functionality.

Lessons

- 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.
- Configure Field Service settings.
- Check your knowledge.
- Summary.

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 14: Work order management in Dynamics 365 Field Service

Use agreements to help creating Work Orders on a predefined schedule such as in preventative

maintenance scenarios.

Additionally, by using 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.

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- Work with incidents.
- Scheduling considerations.
- Work with inventory and warehouses.
- Customer assets.
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- Summary

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- 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.
- Create work orders with Field service in Outlook.
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Module 15: Define agreements in Dynamics 365 Field Service

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- Define invoices.
- Activate the agreement.
- Check your knowledge.
- Summary

In this module, you will:

- Learn about creating agreements and booking setups.
- Define a recurrence pattern and invoices.
- Activate agreements.

Module 16: Use service-level agreements and entitlements in Dynamics 365 Field Service

This module examines how to set up service-level agreements and entitlements in Dynamics 365 Field Service.

Lessons

- Introduction.
- Price lists.
- Create an entitlement.
- Create a work order and add work order products and services.
- Entitlement conflicts.
- Service-level agreements for work orders.
- Create service-level agreements.
- Check your knowledge.

In this module, you will:

- Learn about price lists.
- Create entitlements and work orders.
- Learn about service-level agreements.

Module 17: Create custom apps for Dynamics 365 Field Service

Learn how to use Microsoft Power Platform to create custom apps for Dynamics 365 Field Service.

Lessons

- 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.

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 18: 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.

Lessons

- Introduction.
- Deploy the mobile application.
- Work with enhanced mobile application.
- Service customer assets.
- Work offline and update offline data.
- More mobile application capabilities.
- Check your knowledge.

In this module, you will:

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

Module 19: 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.

Lessons

- Introduction.
- Edit the mobile application.
- Offline configuration.
- Barcode scanning and global search.
- Audit locations.
- Configure push notifications.
- Check your knowledge.
- Summary.

In this module, you will:

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

Module 20: Get started with making Remote Assist calls

Learn about the features of Remote Assist and how it can help technicians solve issues quickly.

Lessons

- Introduction.
- Remote Assist users and roles.
- Compare different device options.
- Make Remote Assist calls.
- Get answers to questions.
- Check your knowledge.
- Summary.

In this module, you will:

- Learn about users and roles.
- Discover different device options.

Module 21: 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.

Lessons

- 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.

In this module, you will:

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

Module 22: Explore Dynamics 365 Field Service

This module introduces learners to Dynamics 365 Field Service, focusing on work orders, inspections, and the Field Service mobile app.

Lessons

- Introduction.
- Describe use cases for Dynamics 365 Field Service.
- Explore a Dynamics 365 Field Service business scenario.
- Describe the work order lifecycle.
- Describe incident types and service tasks.
- Describe Copilot in Field Service.
- Describe inspections in Dynamics 365 Field Service.
- Describe the Dynamics 365 Field Service mobile app.
- Describe the Dynamics 365 Field Service app for Outlook for work order creation and scheduling.
- Knowledge check.
- Summary and resources.

In this module, you will:

- Describe a typical field service lifecycle.
- Examine the lifecycle of a work order.
- Explain inspections.
- Describe the Field Service mobile app.

Module 23: Describe Dynamics 365 Field Service scheduling capabilities and related apps

This module introduces learners to the scheduling capabilities of Dynamics 365 Field Service. It also discusses asset management and Connected Field Service.

Lessons

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| <ul style="list-style-type: none">– Introduction.– Describe resource and scheduling processes.– Explore a Dynamics 365 Field Service-related apps business scenario.– Describe asset management and customer assets. | <ul style="list-style-type: none">– Describe Connected Field Service for Dynamics 365.– Knowledge check.– Summary and resources. <p>In this module, you will:</p> <ul style="list-style-type: none">– Describe the scheduling capabilities available in Dynamics 365 Field Service. | <ul style="list-style-type: none">– Schedule qualified resources.– Describe the available asset management capabilities.– Explain the relationship between Customer Assets and Connected Field Service. |
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ASSOCIATED CERTIFICATIONS & EXAM

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