Field Service Management (FSM) Implementation

1: Field Service Management Implementation Planning

Topics:

- FSM features, process, and data review
- Field service industry good practices
- FSM implementation good practices
- Process Integrations
- Foundation data planning

Labs:

- Lab 1.1 Prepare to Implement Field Service Management

2: Implementing Field Service Processes

Topics:

- Validate Foundation Data
- Configure Field Service Process, Assignment, and Add-ons
- Configure Work Order Creation
- Configure Time Recording

Labs:

- Lab 2.1 Validate Foundation Data
- Lab 2.2a Configure Approval Workflow
- Lab 2.2b Field Service Configuration
- Lab 2.3a Configure Mandatory Skills
- Lab 2.3b Create a Work Order Template
- Lab 2.4 Create an Advanced Maintenance Plan
- Lab 2.5 Configure Advanced Time Recording

3: Optimizing Inventory & Scheduling Operations

Topics:

- Scheduling and Dispatch Configurations
- Dynamic Scheduling Configuration
- Parts Sourcing and Transfer Process automation

Labs:

- Lab 3.1a Configure Central Dispatch
- Lab 3.1b Configure Dynamic Scheduling
- Lab 3.2 Automate Transfer Order Line Task Assignment using Flow Designer

4: Implementing Field Service Mobile

Topics:

- Agent Mobile Application Overview
- Field Service Mobile Configurations
- Mobile Migration Considerations

Labs:

- Lab 4.1 Configure VIP Tasks Applet

5: Implementing Related Processes

Topics:

- Customer Experience Configurations
- Appointment Booking Configuration
- Configure Targeted Communications
- Configure Field Service Knowledge Base and Contextual Search

Labs:

- Lab 5.1a Configure Appointment Booking
- Lab 5.1b Appointment Booking – Advanced Availability Configuration
- Lab 5.2 Create a Targeted Communication and Notification

- Lab 5.3 Configure Contextual Knowledge for the Field Service Knowledge Base