

MB-240 - Microsoft Dynamics 365 Field Service

Course Duration: 32 Hours (4 Days)

Overview

The MB-240T00: Microsoft Dynamics 365 Field Service course is designed to equip learners with the knowledge and skills needed to set up, manage, and utilize the Field Service functionality in Microsoft Dynamics 365. This course covers a wide range of topics including Configuring Field Service, managing work orders, inventory, purchasing, and Implementing assets and connected devices. It also delves into Advanced scheduling options, Customizing the schedule board, and Utilizing the Field Service mobile application. By engaging with the course, participants will learn how to effectively use Microsoft 365 asset management capabilities to streamline service operations, optimize resource scheduling, and enhance Customer Service. The course is structured to provide practical insights and hands-on experience, preparing learners to configure and customize the Field Service application to meet the unique needs of their organization. With this training, participants will be well-equipped to leverage MB-240 to improve field service operations and drive business success.

Audience Profile

The MB-240T00 course enhances skills in configuring and utilizing Microsoft Dynamics 365 Field Service, catering to IT and field service professionals.

- Dynamics 365 Consultants
- Field Service Managers
- IT Professionals
- Field Service Technicians
- Service Schedulers
- Operations Managers
- Customer Service Representatives
- Project Managers
- CRM Administrators
- Technical Support Staff
- Business Analysts
- System Administrators
- Solution Architects

Course Syllabus

Learning Path 1: Configure Field Service Applications

Module 1: Configure Microsoft Dynamics 365 Field Service

- Key field service configuration considerations
- Users and security roles
- Work order types, statuses, and sub statuses

- Incident types and service task types
- Products, services, and pricing options
- Service territories and account preferences
- Lab 0: Validate lab environment
- Lab 1: Configure Field Service

Module 2: Configure Bookable Resources

- Resource roles
- Characteristics and proficiency models
- Configure resources
- Start and end locations
- Working hours and time off
- Pay types

Module 3: Schedule Crews, Facilities, and Resource Pooling

- Crews
- Facilities
- Pools
- Resource Requirement Groups
- Fulfilment preferences
- Lab 2: Skills and characteristics
- Lab 3: Creating resources

Learning Path 2: Manage Work Orders

Module 1: Work Order Management

- Work order lifecycle
- Creating work orders
- Related records
- Agreements

Module 2: Manage Incident Types

- Work order types
- Products and services
- Service task types
- Creating incident types
- Using incident types
- Lab 4: Incident types
- Lab 5: Work order management
- Lab 6: Agreements

Module 3: Create and Perform Inspections

- Purpose of inspections
- Create inspections

- Associate inspections with work orders and customer assets
- Perform inspections by using the Field Service mobile app
- Lab 7: Inspections

Learning Path 3: Schedule and Dispatch Work Orders

Module 1: Manage Scheduling Options

- Identify Field Service scheduling options
- Navigate, filter, and modify basic schedule board settings
- Manually schedule items on the schedule board
- Use the schedule assistant to schedule items on the schedule board
- Lab 8: Scheduling

Module 2: Configure Schedule Boards

- Create and use multiple schedule boards
- Share schedule boards
- Save resource filter
- Other configuration and customization options
- Lab 9: Configure the Schedule Board

Module 3: Resource Scheduling Optimization

- Goals
- Objective and Constraints
- Scope

Learning Path 4: Manage the Field Service Mobile App

Module 1: Get Started with the Dynamics 365 Field Service Mobile Application

- Deploy the mobile app
- Perform work orders
- Service customer assets
- Online and offline data
- Lab 10: Field Service mobile app

Module 2: Customize and Configure the Dynamics 365 Field Service Mobile App

- Customize the mobile app forms, views, and sitemap
- Configure offline data
- Configure barcode features
- Enable location tracking, geofencing, and push notifications

Module 3: Integrate Dynamics 365 Remote Assist with Dynamics 365 FieldService

- Launch Remote Assist mobile from a booking
- Configure a Dynamics 365 Remote Assist one-time call
- Use Dynamics 365 Guides with Work orders

Learning Path 5: Manage Inventory and Purchasing

Module 1: Manage Inventory and Warehouses

- Components in Field Service inventory management
- Warehouses
- Inventory adjustments
- Inventory transfers

Module 2: Manage Purchasing and Returns

- Purchase Order lifecycle
- Receiving products
- Product return options
- Processing returns
- Lab 11: Inventory

Learning Path 6: Implement Assets and Connected Devices

Module 1: Customer Assets

- Asset management capabilities of Field Service
- Create customer assets
- Associate assets with work orders
- Customer asset hierarchies
- Functional locations
- 3D asset models
- Lab 12: Customer assets

Module 2: Connected Field Service

- Use cases for Connected Field Service
- Azure IoT components
- Options for deploying Connected Field Service
- Manage IoT devices
- Device data
- IoT Alerts

Learning Path 7: Power Platform for Field Service

- Module 1: Create Custom Apps for Dynamics 365 Field Service
- Module 2: Universal Resource Scheduling
- Module 3: Customize Schedule Boards