

KOENIG SOLUTIONS • COURSE OUTLINE

MB-240T00: Microsoft Dynamics 365 Field Service

Learn to configure, schedule and manage Dynamics 365 Field Service, from work orders and inventory to mobile apps and connected devices.

4 Days

32 HOURS

19

MODULES

72

TOPICS

13

HANDS-ON LABS

COURSE 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.

WHO THIS COURSE IS FOR

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

What You Will Learn

- Configure work order types, incident types and pricing options
- Set up bookable resources, characteristics and working hours
- Schedule crews, facilities and resource pools
- Manage the work order lifecycle and agreements
- Create and perform inspections using the mobile app
- Customize and share schedule boards
- Manage inventory, warehouses and purchase orders
- Implement customer assets and Connected Field Service

COURSE SYLLABUS

19 Modules, 72 Topics

01

2 Labs

Learning Path 1, Module 1: Configure Microsoft Dynamics 365 Field Service

TOPICS

- 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

02

Learning Path 1, Module 2: Configure Bookable Resources

TOPICS

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

03

2 Labs

Learning Path 1, Module 3: Schedule Crews, Facilities, and Resource Pooling

TOPICS

Crews · Facilities · Pools · Resource Requirement Groups · Fulfilment preferences

01

Learning Path 2, Module 1: Work Order Management

TOPICS

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

02

3 Labs

Learning Path 2, Module 2: Manage Incident Types

TOPICS

Work order types · Products and services · Service task types · Creating incident types · Using incident types

03**Lab**

Learning Path 2, Module 3: Create and Perform Inspections

TOPICS

- Purpose of inspections
- Create inspections
- Associate inspections with work orders and customer assets
- Perform inspections by using the Field Service mobile app

01**Lab**

Learning Path 3, Module 1: Manage Scheduling Options

TOPICS

- 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

02**Lab**

Learning Path 3, Module 2: Configure Schedule Boards

TOPICS

Create and use multiple schedule boards · Share schedule boards · Save resource filter · Other configuration and customization options

03

Learning Path 3, Module 3: Resource Scheduling Optimization

TOPICS

Goals · Objective and Constraints · Scope

01**Lab**

Learning Path 4, Module 1: Get Started with the Dynamics 365 Field Service Mobile Application

TOPICS

Deploy the mobile app · Perform work orders · Service customer assets · Online and offline data

02

Learning Path 4, Module 2: Customize and Configure the Dynamics 365 Field Service Mobile App

TOPICS

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

03

Learning Path 4, Module 3: Integrate Dynamics 365 Remote Assist with Dynamics 365 Field Service

TOPICS

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

01

Learning Path 5, Module 1: Manage Inventory and Warehouses

TOPICS

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

02

Learning Path 5, Module 2: Manage Purchasing and Returns

Lab

TOPICS

Purchase Order lifecycle · Receiving products · Product return options · Processing returns

01**Lab**

Learning Path 6, Module 1: Customer Assets

TOPICS

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

02

Learning Path 6, Module 2: Connected Field Service

TOPICS

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

01

Learning Path 7, Module 1: Create Custom Apps for Dynamics 365 Field Service

02

Learning Path 7, Module 2: Universal Resource Scheduling

03

Learning Path 7, Module 3: Customize Schedule Boards

Practise What You Learn

#	MODULE	ACTIVITY
01	Learning Path 1, Module 1: Configure Microsoft Dynamics 365 Field Service	■ Lab 0: Validate lab environment ■ Lab 1: Configure Field Service
03	Learning Path 1, Module 3: Schedule Crews, Facilities, and Resource Pooling	■ Lab 2: Skills and characteristics ■ Lab 3: Creating resources
02	Learning Path 2, Module 2: Manage Incident Types	■ Lab 4: Incident types ■ Lab 5: Work order management ■ Lab 6: Agreements
03	Learning Path 2, Module 3: Create and Perform Inspections	Lab 7: Inspections
01	Learning Path 3, Module 1: Manage Scheduling Options	Lab 8: Scheduling
02	Learning Path 3, Module 2: Configure Schedule Boards	Lab 9: Configure the Schedule Board
01	Learning Path 4, Module 1: Get Started with the Dynamics 365 Field Service Mobile Application	Lab 10: Field Service mobile app
02	Learning Path 5, Module 2: Manage Purchasing and Returns	Lab 11: Inventory
01	Learning Path 6, Module 1: Customer Assets	Lab 12: Customer assets

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

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