

MB - 240 : Microsoft Dynamics 365 Field Service

Course Outline

Module 1: Configure Field Service

This module introduces the configuration of the Field Service application, including defining products, services, and tax codes.

Lessons:

- Introduction to Configuring Field Service
- Defining Products and Services
- Defining Tax Codes

Module 2: Resource Scheduling Configuration

Learn how to configure resource scheduling, including mapping, location information, resource components, and account preferences.

Lessons:

- Mapping and Location Information
- Configuring Resource Components
- Defining Account Preferences

Module 3: Defining and Configuring Bookable Resources

This module covers defining bookable resources, including resource pools, crews, and facilities.

Lessons:

- Defining Bookable Resources
- Resource Pools, Crews, and Facilities

Module 4: Configure Incidents

Learn how to create and manage incidents within Field Service, including using service tasks.

Lessons:

- Creating an Incident
- Using Service Tasks

Module 5: Inventory and Work Order Management

This module covers the configuration, creation, and management of Field Service work orders.

Lessons:

- Configure Field Service Work Orders
- Creating Work Orders
- Managing Work Orders

Module 6: Field Service Agreements

Understand Field Service agreements, including setting up bookings and invoices.

Lessons:

- Using Field Service Agreements
- Set Up Bookings

- Set Up Invoices

Module 7: Inventory and Purchasing

This module focuses on managing customer assets, inventory, and handling purchasing and returns.

Lessons:

- Manage Customer Assets
- Manage Inventory
- Purchasing and Returns

Module 8: Field Service Mobile

Learn about the Field Service mobile client, including installation, deployment, and management of mobile projects.

Lessons:

- Mobile Client Overview
- Install and Deploy Field Service Mobile Projects
- Manage Mobile Projects
- Deploy the Mobile Client

Module 9: Universal Resource Scheduling

Explore Universal Resource Scheduling (URS) including its overview, configuration, and customization of entities.

Lessons:

- URS Overview and Configuration
- Enabling Entities for URS
- Customize Entities for URS

Module 10: Managing Scheduling Options

Learn how to use the schedule board, schedule items, reschedule resources, and manage crew and pool scheduling.

Lessons:

- Using the Schedule Board
- Schedule Items
- Rescheduling and Substituting Resources
- Crew and Pool Scheduling

Module 11: Customizing the Schedule Board

Customize the schedule board, including creating additional boards, using views, and configuring queries and filters.

Lessons:

- Configure the Board
- Create Additional Schedule Boards
- Use Views to Enhance the Schedule Board
- Configuring Schedule Board Queries and Filters
- Working with Requirement Groups

Module 12: Advanced Scheduling Options

This module delves into advanced scheduling options, including resource scheduling optimization and defining optimization goals, scopes, and profiles.

Lessons:

- Working with Resource Scheduling Optimization
- Defining Optimization Goals
- Defining Optimization Scopes
- Defining Optimization Profiles
- Single Resource Scheduling

SpireTec Solutions