

MB-240: Microsoft Dynamics 365 for Field Service

MB-240T01-A: Configuring Dynamics 365 for Field Service

Course Outline

Module 1: Configure Field Service

Lessons

- Introduction to field service
- Defining products and services
- Defining tax codes

Module 2: Resource scheduling configuration

Lessons

- Mapping and location information
- Configuring resource components
- Defining account preferences

Module 3: Defining and configuring bookable resources

Lessons

- Defining bookable resources
- Resource pools, crews and facilities

Module 4: Working with and configuring incidents

Lessons

- Creating incidents
- Using service tasks
- Defining products, services and skills

MB-240T02-A: Work order and delivery execution for Dynamics 365 for Field Service

Course Outline

Module 1: Field Service Work Orders

Lessons

- Configure field service work orders
- Creating work orders
- Managing work orders

Module 2: Field Service Agreements

Lessons

- Using field service agreements
- Set up bookings
- Set up invoices

Module 3: Inventory and Purchasing

Lessons

- Manage customer assets
- Manage inventory
- Purchasing and returns

Module 4: Field Service Mobile

Lessons

- Field Service Mobile Application overview
- Install and deploy Field Service Mobile Projects
- Manage Mobile Projects
- Deploy the Mobile client

MB-240T03-A: Universal Resource Scheduling for Dynamics 365 for Field Service

Course Outline

Module 1: Universal Resource Scheduling

Lessons

- URS overview and configuration
- Enabling entities for URS
- Entity customization and automation considerations

Module 2: Managing scheduling options

Lessons

- Using the Schedule Board
- Scheduling items
- Rescheduling and substituting resources
- Crew and resource pool scheduling

Module 3: Customizing the Schedule Board

Lessons

- Configure the schedule board
- Create additional schedule boards
- Leverage Dynamics 365 views with the schedule board
- Configure schedule board queries and filters
- Working with requirement groups

Module 4: Resource Scheduling Optimization

Lessons

- Resource Scheduling Optimization overview
- Defining optimization goals
- Defining optimization scopes
- Defining optimization profiles