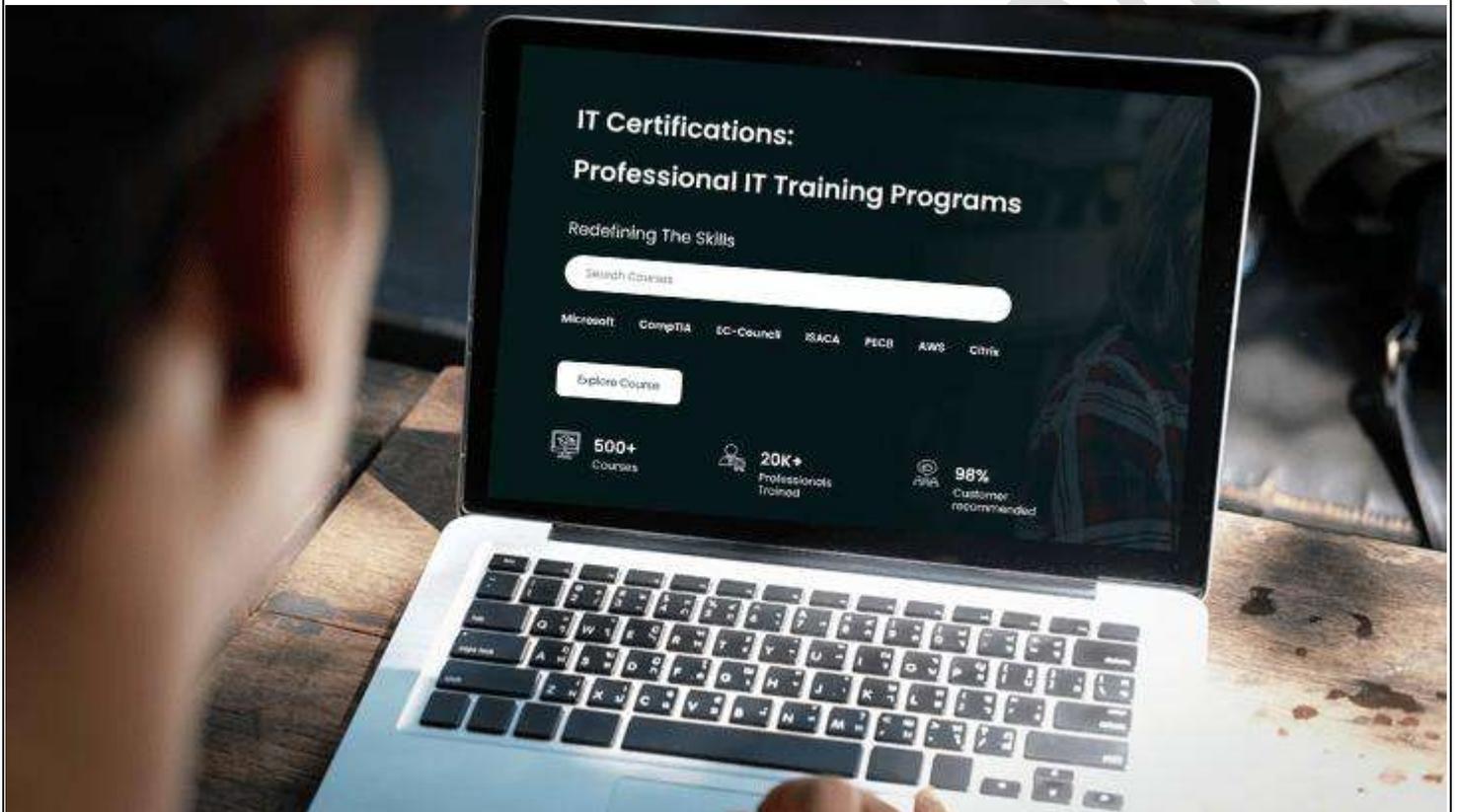




Redefining The Skills



MB-240T00: MICROSOFT DYNAMICS 365 FIELD SERVICE TRAINING

Duration: 3 Days

Course Description

MB 240T00: Microsoft Dynamics 365 Field Service Training helps professionals deliver better positions to an organization. Empowering with tools to identify, schedule, and manage a business resource this training deals with customizing schedule boards while teaching how to use Microsoft 365 asset management effectively.

By completing this course professionals would be able to determine the key components in the field service implementation. They will be able to define the product/service that will be offered to consumers. In many scenarios, professionals also determine the pricing.

This training helps to prepare for the Exam MB 240: Microsoft Dynamics 365 Field Service.

This course is based on the objectives of the course version MB 240T00 A.

Who should attend this course?

- Any professional who have experience in IT or have an interest in delivering field service solutions for large-scale consumers.
- Given below are professionals who can use Microsoft Dynamics 365 Field Service Training to upskill their current positions:
 - Service Schedulers
 - Project Managers
 - CRM Administrators
 - IT Professionals
 - Dynamics 365 Consultants
 - Business Analysts
 - Solution Architects
 - System Administrators

What you will learn

- Determine which resources are required.
- Determine which pricing options to use in specific scenarios.
- Identify the key components involved in Field Service Implementations.
- Define the products and services that will be delivered to customers.

Prerequisites

Recommended

- MB 910T00: Microsoft Dynamics 365 Fundamentals (CRM)
- Professionals pursuing this course must have basic computer knowledge.

Curriculum

Module 1: Configure Microsoft Dynamics 365 Field Service

- Identify key service configuration considerations
- Users and security roles
- Define work order types, statuses and sub statuses
- Define incident and service task types

- Define Field Service products, services, and pricing options
- Define service territories
- Configure Field Service account preferences

Module 2: Configure bookable resources in Dynamics 365 Field Service

- Identify the different types of resources available
- Define supporting resource components such as characteristics, roles, and organizational units
- Set up an individual bookable resource
- Geocode resources, starting and ending locations, and viewing in the map
- Define pools, crews, and facilities

Module 3: Schedule crews, facilities, and resource pooling in Dynamics 365 Field Service

- Define and use resource pools in scheduling scenarios
- Use the facility scheduling feature to book specific facilities for work
- Define and schedule crews using the schedule board

Module 4: Work order management in Dynamics 365 Field Service

- Identify the work order lifecycle
- Identify the different options available for creating work orders
- Use related records such as service accounts, incidents, products and services, and other items with work orders
- Apply entitlements
- Create and manage agreements
- Create and manage service level agreements (SLAs) for work orders
- Define and manage inventory and warehouses

Module 5: Incident types in Dynamics 365 Field Service

- Learn about the purpose of incident types in Dynamics 365 Field Service
- Learn how to create incident types
- Create service tasks and use them in an incident type
- Add products and services to an incident type
- Define the duration of an incident type
- Use incident types on work orders

Module 6: Inspections in Dynamics 365 Field Service

- Learn about the purpose of inspections in Dynamics 365 Field Service
- Learn how to create inspections
- Associate inspections with work orders and customer assets
- Perform inspections by using the Field Service mobile app

Module 7: Manage scheduling options in Dynamics 365 for Field Service

- Identify scenarios where the different field service scheduling options could be used
- Navigate, filter, and modify basic schedule board settings
- Manually schedule and reschedule items on the schedule board
- Use the resource availability search (schedule assistant) to schedule items on the schedule board

Module 8: Customize the schedule board in Dynamics 365 Field Service

- Define each pane in schedule board
- Edit schedule board views and tooltips
- Edit map pane

- Schedule board alerts
- Extend schedule board with JavaScript and HTML

Module 9: Deploying Resource Scheduling Optimization

- Set up and deploy Resource Scheduling Optimization
- Learn about the configuration options and define optimization goals, scopes, and schedules

Module 10: Get started with the Dynamics 365 Field Service Mobile application

- Learn how to deploy and use the mobile application
- Learn about Service assets
- Use online and offline data

Module 11: Customize and configure the Dynamics 365 Field Service Mobile application

- Customize and edit the mobile application
- Configure offline data and barcodes
- Enable location tracking and push notifications

Module 12: Integrate Dynamics 365 Remote Assist with Dynamics 365 Field Service

- Launch Remote Assist mobile from a booking
- Review relevant work order information
- Post call information

Module 13: Customer assets in Dynamics 365 Field Service

- Discover the purpose of customer assets in Field Service
- Learn how to create customer assets
- Learn how to associate customer assets with work orders
- Learn how to configure customer asset hierarchies
- Learn how to use functional locations

Module 14: Set up Field Service to create work orders from IoT data

- Learn about the installation and setup of Connected Field Service
- Read device data
- Set device alerts
- Learn about using the mobile app

Module 15: Create custom apps for Dynamics 365 Field Service

- Learn how to use Microsoft Power Platform to customize Dynamics 365 Field Service
- Learn how to create Microsoft Power Apps applications for Dynamics 365 Field Service
- Learn how to deploy the customer experiences homepages portal for Field Service
- Discover how to customize Field Service
- Learn how to set up and customize schedule boards
- Learn how to enable a custom table for scheduling

Module 16: Gather customer feedback with Dynamics 365 Customer Voice

- Learn how to improve relationships with your customers by reviewing feedback data
- Learn how to use templates in Customer Voice to create projects, surveys, and emails
- Discover how to collect feedback by using Microsoft Power Automate, Omnichannel for Customer Service, and Customer Service Insights
- Find out how to use Customer Voice to understand your clients' needs and requirements
- Lab: Customize email templates with survey variables