GALILEU

MB-240: Microsoft Dynamics 365 Field Service

Microsoft - Business Applications

- **Nível:** Intermédio
- **Duração:** 21h

Sobre o curso

Dynamics 365 Field Service helps organizations better position themselves in the market by providing a variety of tools that assist in identifying and scheduling resources and managing workloads for mobile workers.

This course will equip students with the skills necessary to identify and configure the key components that are used to deliver Field Service and mobile solutions. Key topics include identifying the organizational considerations that will drive configuration decisions and common configuration aspects. This course helps students better understand the bigger picture and end goals focused around implementations that aid in designing more efficient solutions that align with customer and organizational goals.

Destinatários

This course is designed for IT professionals with experience or interest in delivering Field Service solutions for large-scale customers.

Objetivos

You will learn to:

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

Programa

- Configure Field Service
- Resource Scheduling Configuration
- Defining and Configuring Bookable Resources
- Configure Incidents
- Inventory and Work Order Management
- Field Service Agreements
- Inventory and Purchasing
- Field Service Mobile
- Universal Resource Scheduling
- Managing Scheduling Options
- Customizing the Schedule Board
- Advanced Scheduling Options

Configure Field Service

In this introductory module, we will introduce key concepts of Dynamics 365 Field Service, including products, services, and tax codes.

Lessons

- Introduction to configuring Field Service
- Defining products and services
- Defining tax codes

Resource Scheduling Configuration

In this module, we will explore the concept of resource scheduling, and learn how to configure the system to schedule resources efficiently.

Lessons

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

Defining and Configuring Bookable Resources

In this module, we will learn how to create and manage bookable resources, including resource pools and crews.

Lessons

- Defining bookable resources
- Resource pools, crews and facilities

Configure Incidents

In this module, we will learn how incidents can improve the scheduling efficiency and consistency of your organization.

Lessons

- Creating an incident
- Using service tasks

Inventory and Work Order Management

In this module, we will learn how to create and use work orders to schedule resources.

Lessons

- Configure Field Service work orders
- Creating work orders
- Managing work orders

Field Service Agreements

In this module, we will introduce agreements, and learn how to configure them for your organization.

Lessons

- Using Field Service agreements
- Set up bookings
- Set up invoices

Inventory and Purchasing

In this module, we will learn about management of customer assets.

Lessons

- Manage customer assets
- Manage inventory
- Purchasing and returns

Field Service Mobile

In this module, we will learn how to use and configure the Field Service Mobile application for a mobile workforce.

Lessons

- Mobile client overview
- Install and deploy Field Service mobile projects
- Manage mobile projects
- Deploy the mobile client

Universal Resource Scheduling

In this module, we will introduce the concept of Universal Resource Scheduling, and describe how it can be leveraged for an organization.

Lessons

- URS overview and configuration
- Enabling entities for URS
- Customize entities for URS

Managing Scheduling Options

In this module, we will learn how to use the schedule board to reschedule, substitute resources, and schedule pools and crews.

Lessons

- Using the schedule board
- Schedule items
- Rescheduling and substituting resources
- Crew and pool scheduling

Customizing the Schedule Board

In this module, we will learn how to configure the schedule board to best meet the organization or scheduler's needs.

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

Advanced Scheduling Options

In this module, we will dive deeper into the options for customizing the scheduling of work orders based on unique business requirements.

Lessons

- Working with resource scheduling optimization
- Defining optimization goals
- Defining optimization scopes
- Defining optimization profiles
- Single resource scheduling