



# MB-240T00: Microsoft Dynamics 365 Field Service

Course ID #: 7000-403-ZZ-Z

Hours: 21

## Course Content

### Course Description:

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.

### At Course Completion:

After completing this course, student will be able 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.

### Target Student:

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

### Topics:

#### Module 1: Configure Field Service

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

#### Module 2: Resource Scheduling Configuration

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

#### Module 3: Defining and Configuring Bookable Resources

- Defining bookable resources
- Resource pools, crews and facilities

#### Module 4: Configure Incidents

- Creating an incident
- Using service tasks



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## Module 5: Inventory and Work Order Management

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

## Module 6: Field Service Agreements

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

## Module 7: Inventory and Purchasing

- Manage customer assets
- Manage inventory
- Purchasing and returns

## Module 8: Field Service Mobile

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

## Module 9: Universal Resource Scheduling

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

## Module 10: Managing Scheduling Options

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

## Module 11: Customizing the Schedule Board

- 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

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