

COURSE OVERVIEW

Course Name:
(MB-240) Microsoft Dynamics 365 Field Services

COURSE DURATION: 4 Days

Gauteng:

3rd Floor, 34 Whitely Road
Melrose Arch
Johannesburg
2196

Gauteng:

192 on Bram
192 Bram Fischer Drive
Ferndale, Randburg
Johannesburg
2160

Cape Town:

3rd Floor, Thomas Pattullo Building
19 Jan Smuts St
Cape Town
8000

Durban:

9 Mountview Close
Broadlands
Mount Edgecombe
Durban
4302

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INTRODUCTION

Learn how to effectively configure a Dynamics 365 for Field Service implementation to maximize the tools and features available to efficiently manage a mobile work force.

DELIVERY METHOD

Our courses have flexible delivery options:

- In-person classroom training at the Impactful training facilities
 - Johannesburg, Durban, Cape Town
- Virtual instructor-led training
- Nationally: on-site at the client

INTENDED AUDIENCE

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

PREREQUISITES

Professionals planning to enroll in this course must have the fundamental knowledge of Microsoft Dynamics 365 navigation, functionalities, and features.

COURSE CONTENT

Configure Microsoft Dynamics 365 Field Service

One of the main advantages to Dynamics 365 Field Service is the ability to configure it based on your organization needs. Configuration options might include Identifying key configuration considerations, defining products and services, and other related factors and the defining the necessary Work Order Types, substatures, service territories, and account configuration that will support the desired Functionality.

Configure bookable resources in Dynamics 365 Field Service

This module will focus on how bookable resources are used in universal resource scheduling. Configuring resources, working with bookable resources, setup of supporting components such as characteristics and roles, and working with facilities, crews, and resource pools is also covered.

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

Handle more advanced scheduling options that might involve multiple resources, or specific facilities. Use resource pooling to provide place holders for scheduling groups of resources. Schedule crews to work on specific items. Schedule specific facilities that might be used to help deliver a specific service.

Work order management, agreements, inventory, and purchasing in Dynamics 365 Field Service

Leverage agreements to assist in creating Work Orders on a predefined schedule such as in preventative maintenance scenarios. Additionally, by leveraging inventory, they can more effectively manage inventory levels at warehouses and ensure that technicians have what they need to deliver services to their customer while in the field. Dynamics 365 has several foundational elements that can be configured to better tailor a Field Service implementation to meet the desired needs of an organization.

Incident types in Dynamics 365 Field Service

Define and create incident types to use as templates when you are creating work orders in Dynamics 365 Field Service.

Inspections in Dynamics 365 Field Service

Learn how to create and perform inspections in Dynamics 365 Field Service.

Manage scheduling options in Dynamics 365 for Field Service

Dispatchers and schedulers need to easily identify and schedule resources to work on jobs. They should be able to identify which scheduling method will best be used based on the scenario that they are trying to schedule. When scenarios arise that require assistance, dispatchers can use the schedule assistant to provide recommendations based on requirements that are defined for the job. Many times, items that are scheduled will need to be rescheduled or assigned to a different resource. With Dynamics 365, schedule board dispatchers can easily identify which items need to be rescheduled and either reschedule them or rebook them to a different resource.

Customize the schedule board in Dynamics 365 Field Service

Tailoring the schedule board for easier scheduling is made possible with multiple schedule boards, views, and schedule board options. We'll look at how we configure the filters, queries, and entities for use with the schedule board.

Deploying Resource Scheduling Optimization

Learn how to setup and deploy Resource Scheduling Optimization in this module. Topics include configuration options, defining optimization goals and scope as well as optimizing schedules.

Get started with the Dynamics 365 Field Service Mobile application

Dynamics 365 Field Service Mobile application is built on Microsoft Power Platform and provides tools that help frontline workers serve customers in the field. While working in the field, they can access important information such as work orders, customer asset lists, accounts, and contacts.

Customize and configure the Dynamics 365 Field Service Mobile application

Learn how to customize and configure the Dynamics 365 Field Service Mobile application forms, views, and site map.

Integrate Dynamics 365 Remote Assist with Dynamics 365 Field Service

Organizations that use Dynamics 365 Field Service to manage work orders can also enable their technicians to make remote assist calls in context of work orders.

Customer assets in Dynamics 365 Field Service

Learn how to create and associate customer assets with work orders in Dynamics 365 Field Service.

Set up Field Service to create work orders from IoT data

Connected Field Service for Dynamics 365 integrates IoT devices with Dynamics 365 for Customer Engagement to help organizations create a proactive approach to servicing customers. It enables the registration, monitoring, and management of these devices into your organization's established business processes.

Create custom apps for Dynamics 365 Field Service

Learn how to use Microsoft Power Platform to create custom apps for Dynamics 365 Field Service.

Gather customer feedback with Dynamics 365 Customer Voice

Learn how to request and gather customer feedback by using Dynamics 365 Customer Voice.