

## MB-240T00 Dynamics 365 for Field Service

### Überblick

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.

### Voraussetzungen

Basic understanding of Dynamics 365 features, functionality, and navigation.

### Zielgruppe

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

### Ziel

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.

### Agenda

#### 1 - Configure Field Service

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

#### 2 - Resource Scheduling Configuration

Mapping and location information  
Configuring resource components  
Defining account preferences

[Online anmelden](#)

### Kurs Agenda

Dauer in Tagen: 3

G2R = "Kurs läuft garantiert" | OLL = "Online LIVE"  
ILT = "Klassenraumtraining"

Datum		Zeit	Ort	Methode	Nettopreis
06.09.2021	GTR	3:00PM - 11:00PM	Frankfurt	OLL	EUR 1770.00
15.12.2021	GTR	5:00PM - 1:00AM	Frankfurt	OLL	EUR 1770.00

LiveZilla script

### **3 - Defining and Configuring Bookable Resources**

Defining bookable resources  
Resource pools, crews and facilities

### **4 - Configure Incidents**

Creating an incident  
Using service tasks

### **5 - Inventory and Work Order Management**

Configure Field Service work orders  
Creating work orders  
Managing work orders

### **6 - Field Service Agreements**

Using Field Service agreements  
Set up bookings  
Set up invoices

### **7 - Inventory and Purchasing**

Manage customer assets  
Manage inventory  
Purchasing and returns

### **8 - Field Service Mobile**

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

### **9 - Universal Resource Scheduling**

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

### **10 - Managing Scheduling Options**

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

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## 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

## 12 - Advanced Scheduling Options

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

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