Work order and delivery execution for Dynamics 365 for Field Service (MB-240.2)

Modality: On Demand

Duration: 16 Hours

About the course:

Mobile work forces are the new and efficient way of getting your products and services to customers. If you are an organization who wants to be equipped with tools that will help you with identifying and scheduling recourse then Dynamics 365 for field services will do the job for you.
It is the perfect way to learn how delivers field services and mobile solutions. You will learn various skills that can be used in order to perform the aforementioned tasks.
You will learn from various topics, which include observing the lifecycle of a typical work order, and what organizational considerations you need to see that will affect your configuration decisions. You will also learn about key components relating to inventory, agreements, strategy etc. This will ensure that customer response is timely, goods and services are procured efficiently, they are on top of their predictive insights and all these processes are taking place in a harmonious manner.

Aims:

- learning about the work orders lifecycle
- knowing how to generate agreements that will help in creating work orders
- understanding of the inventory management capabilities of Dynamics 365 for Field Service
- learning about the Field Service Mobile Application mainly about deploying and configuring it

Targeted audience:

- Information workers
- IT Professionals and Developers

Prerequisites:

Familiarity with Dynamics 365 features

Course Outline:

Inventory and Work Order Management

- Configure Field Service Work Orders

- Creating Work Orders

- Managing Work Orders

- Practice Lab

- Module summary

Field Service Agreements

- Using Field Service agreements

- Set up bookings

- Set up invoices

- Practice Lab
- Module summary

Inventory and Purchasing

- Manage customer assets

- Manage inventory

- Purchasing and returns

- Module summary

Field Service Mobile

- Mobile client overview

- Install and deploy Field Service mobile projects

- Manage mobile projects

- Deploy the mobile client

- Practice Labs

- Module summary