

## **Dynamics 365 Field Service Certification: Dynamics 365 for Field Service (MB-240)**

**Modality:** Virtual Classroom

**Duration:** 3 Days

**SATV Value:** 3

**CLC:**

**NATU:**

**SUBSCRIPTION:** Master

*Candidates enrolling directly in this course without the Master Subscription Plan will receive a free official exam voucher for the MB-240 Exam (Except Purchases included in Training Vouchers/SATV). There is no free official exam voucher for candidates enrolling using the Master Subscription Plan. However, the official exam voucher can be purchased separately on request.*

### **About this Course:**

Businesses heavily rely on mobile-based workforces for product and services delivery and require to implement Dynamics 365 features and functionalities. Configuring Field Service with Dynamics 365 allows businesses to improve their market position and help in effective scheduling and identification of resources for better management of workloads. On average, a Microsoft Dynamics Consultant earns \$102,330 annually. This course covers the identification, configuring, and execution of the key components used in delivering Field Service & Mobile Solutions. It also shed light on Work Order Lifecycle, Inventory Components, Agreements, and Mobility & Purchasing Strategies.

### **Course Objectives:**

The core objective of this course is to help professionals gain a better understanding and sound knowledge of the following key principles:

- Field Service Implementation Key Components Identification
- Describing Services, Products, and Customer Deliverables
- Identifying the Best Pricing Option and Required Resources
- System Configuration in Accordance with Resource Requirements
- Key Areas Identification in a Work Order Lifecycle
- Automatically Developing Work Orders by Agreement Generation
- Microsoft Dynamics 365 for Field Service Inventory Management Capabilities
- Developing Purchase Orders with the help of Lifecycle
- Field Service Mobile Application Deployment and Configuration
- Leveraging Scheduling Features by Application Configuration
- Locating and Scheduling Resources through Scheduling Features
- Satisfying Organizational Needs by Modifying the Application
- Scheduling Single and Multiple Resources by Solution Development
- Universal Resource Scheduling and Extension Options Identification

## **Audience:**

This course is specifically tailored for the following group of professionals and interested candidates:

- Microsoft Dynamics 365 Consultant
- Information Workers & IT Professionals

## **Prerequisites:**

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

## **Course Outline:**

### **MB-240T01-A: Configuring Dynamics 365 for Field Service**

#### **Module 1: Configure Field Service**

##### **Lessons**

- Introduction to field service
- Defining products and services
- Defining tax codes

#### **Module 2: Resource scheduling configuration**

##### **Lessons**

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

#### **Module 3: Defining and configuring bookable resources**

##### **Lessons**

- Defining bookable resources
- Resource pools, crews and facilities

#### **Module 4: Working with and configuring incidents**

##### **Lessons**

- Creating incidents
- Using service tasks
- Defining products, services and skills

### **MB-240T02-A: Work order and delivery execution for Dynamics 365 for Field Service**

## **Module 1: Field Service Work Orders**

### **Lessons**

- Configure field service work orders
- Creating work orders
- Managing work orders

## **Module 2: Field Service Agreements**

### **Lessons**

- Using field service agreements
- Set up bookings
- Set up invoices

## **Module 3: Inventory and Purchasing**

### **Lessons**

- Manage customer assets
- Manage inventory
- Purchasing and returns

## **Module 4: Field Service Mobile**

### **Lessons**

- Field Service Mobile Application overview
- Install and deploy Field Service Mobile Projects
- Manage Mobile Projects
- Deploy the Mobile client

## **MB-240T03-A: Universal Resource Scheduling for Dynamics 365 for Field Service**

### **Module 1: Universal Resource Scheduling**

#### **Lessons**

- URS overview and configuration
- Enabling entities for URS
- Entity customization and automation considerations

### **Module 2: Managing scheduling options**

#### **Lessons**

- Using the Schedule Board

- Scheduling items
- Rescheduling and substituting resources
- Crew and resource pool scheduling

### **Module 3: Customizing the Schedule Board**

#### **Lessons**

- Configure the schedule board
- Create additional schedule boards
- Leverage Dynamics 365 views with the schedule board
- Configure schedule board queries and filters
- Working with requirement groups

### **Module 4: Resource Scheduling Optimization**

#### **Lessons**

- Resource Scheduling Optimization overview
- Defining optimization goals
- Defining optimization scopes
- Defining optimization profiles