

## Course duration

- 3 days

## Course Benefits

- 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.

### Available Delivery Methods

#### Public Class

Public expert-led online training from the convenience of your home, office or anywhere with an internet connection. Guaranteed to run .

#### Private Class

Private classes are delivered for groups at your offices or a location of your choice.

### Microsoft Certified Partner

Webucator is a Microsoft Certified Partner for Learning Solutions (CPLS). This class uses official Microsoft courseware and will be delivered by a Microsoft Certified Trainer (MCT).

## Course Outline

1. Configure Field Service
  1. Introduction to configuring Field Service
  2. Defining products and services
  3. Defining tax codes
  4. you will be able to:
  5. Create and manage products and services
  6. Configure tax codes for your organization
2. Resource Scheduling Configuration efficiently.Lessons
  1. Mapping and location information
  2. Configuring resource components
  3. Defining account preferences

4. you will be able to:
5. Configure resource scheduling for your organization
6. Define account preferences
7. Enable location mapping
3. Defining and Configuring Bookable Resources
  1. Defining bookable resources
  2. Resource pools, crews and facilities
  3. you will be able to:
  4. Define bookable resources
  5. Create pools and crews
  6. Manage facility records
4. Configure Incidents
  1. Creating an incident
  2. Using service tasks
  3. you will be able to:
  4. Create an incident for common service tasks
  5. Schedule using incidents
5. Inventory and Work Order Management
  1. Configure Field Service work orders
  2. Creating work orders
  3. Managing work orders
  4. you will be able to:
  5. Configure work orders
  6. Schedule resources using work orders
6. Field Service Agreements
  1. Using Field Service agreements
  2. Set up bookings
  3. Set up invoices
  4. you will be able to:
  5. Use an agreement to schedule work orders
  6. Generate invoices for customers
7. Inventory and Purchasing
  1. Manage customer assets
  2. Manage inventory
  3. Purchasing and returns
  4. you will be able to:
  5. Create customer asset records
  6. Manage inventory, purchasing and returns
8. Field Service Mobile
  1. Mobile client overview
  2. Install and deploy Field Service mobile projects
  3. Manage mobile projects
  4. Deploy the mobile client
  5. you will be able to:
  6. Manage mobile projects
  7. Install and deploy the mobile client
  8. Describe the value of the mobile app for a mobile workforce

- 9. Universal Resource Scheduling
  - 1. URS overview and configuration
  - 2. Enabling entities for URS
  - 3. Customize entities for URS
  - 4. you will be able to:
  - 5. Describe Universal Resource Scheduling
  - 6. Enable an entity for URS
- 10. Managing Scheduling Options
  - 1. Using the schedule board
  - 2. Schedule items
  - 3. Rescheduling and substituting resources
  - 4. Crew and pool scheduling
  - 5. you will be able to:
  - 6. Configure and use the schedule board to schedule resources
  - 7. Reschedule work orders
  - 8. Substitute resources
- 11. Customizing the Schedule Board
  - 1. Configure the board
  - 2. Create additional schedule boards
  - 3. Use views to enhance the schedule board
  - 4. Configuring schedule board queries and filters
  - 5. Working with requirement groups
  - 6. you will be able to:
  - 7. Customize the schedule board
  - 8. Create additional boards
  - 9. Add views to a schedule board
- 12. Advanced Scheduling Options
  - 1. Working with resource scheduling optimization
  - 2. Defining optimization goals
  - 3. Defining optimization scopes
  - 4. Defining optimization profiles
  - 5. Single resource scheduling
  - 6. you will be able to:
  - 7. Define optimization for an organization
  - 8. Schedule single resources
- 13. Connected Field Service
  - 1. Get started
  - 2. IoT Central with Connected Field Service
  - 3. Register and manage devices

## Class Materials

Each student will receive a comprehensive set of materials, including course notes and all the class examples.

## Class Prerequisites

Experience in the following *is required* for this Dynamics 365 class:

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