

Microsoft Dynamics 365 Field Service

Module 1: Configure Field Service

In this introductory module, we will introduce key concepts of Dynamics 365 Field Service, including products, services, and tax codes.

Lessons

Introduction to configuring Field Service

Defining products and services

Defining tax codes

you will be able to:

Create and manage products and services

Configure tax codes for your organization

Module 2: Resource Scheduling Configuration

In this module, we will explore the concept of resource scheduling, and learn how to configure the system to schedule resources efficiently.

Lessons

Mapping and location information

Configuring resource components

Defining account preferences

you will be able to:

Configure resource scheduling for your organization

Define account preferences

Enable location mapping

Module 3: Defining and Configuring Bookable Resources

In this module, we will learn how to create and manage bookable resources, including resource pools and crews.

Lessons

Defining bookable resources

Resource pools, crews and facilities

you will be able to:

Define bookable resources

Create pools and crews

Manage facility records

Module 4: Configure Incidents

In this module, we will learn how incidents can improve the scheduling efficiency and consistency of your organization.

Lessons

Creating an incident

Using service tasks

you will be able to:

Create an incident for common service tasks

Schedule using incidents

Module 5: Inventory and Work Order Management

In this module, we will learn how to create and use work orders to schedule resources.

Lessons

Configure Field Service work orders

Creating work orders

Managing work orders

you will be able to:

Configure work orders

Schedule resources using work orders

Module 6: Field Service Agreements

In this module, we will introduce agreements, and learn how to configure them for your organization.

Lessons

Using Field Service agreements

Set up bookings

Set up invoices

you will be able to:

Use an agreement to schedule work orders

Generate invoices for customers

Module 7: Inventory and Purchasing

In this module, we will learn about management of customer assets.

Lessons

Manage customer assets

Manage inventory

Purchasing and returns

you will be able to:

Create customer asset records

Manage inventory, purchasing and returns

Module 8: Field Service Mobile

In this module, we will learn how to use and configure the Field Service Mobile application for a mobile workforce.

Lessons

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

you will be able to:

- Manage mobile projects
- Install and deploy the mobile client
- Describe the value of the mobile app for a mobile workforce

Module 9: Universal Resource Scheduling

In this module, we will introduce the concept of Universal Resource Scheduling, and describe how it can be leveraged for an organization.

Lessons

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

you will be able to:

- Describe Universal Resource Scheduling
- Enable an entity for URS

Module 10: Managing Scheduling Options

In this module, we will learn how to use the schedule board to reschedule, substitute resources, and schedule pools and crews.

Lessons

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

you will be able to:

- Configure and use the schedule board to schedule resources
- Reschedule work orders
- Substitute resources

Module 11: Customizing the Schedule Board

In this module, we will learn how to configure the schedule board to best meet the organization or scheduler's needs.

Lessons

- Configure the board
- Create additional schedule boards
- Use views to enhance the schedule board
- Configuring schedule board queries and filters
- Working with requirement groups

you will be able to:

- Customize the schedule board
- Create additional boards
- Add views to a schedule board

Module 12: Advanced Scheduling Options

In this module, we will dive deeper into the options for customizing the scheduling of work orders based on unique business requirements.

Lessons

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

you will be able to:

- Define optimization for an organization
- Schedule single resources