

# 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