

Module Title : MB-240T02-A: Work Order and Delivery Execution for Dynamics 365 for Field Service
Duration : 1 day

Overview

Many organizations rely on mobile work forces to deliver their products and services to their customers. Dynamics 365 for Field Service helps organizations better position themselves in the market by providing a variety of tools that assist in efficiently identifying and scheduling resources as well as assisting in managing workloads for mobile workers.

This course will equip students with the skills necessary to execute, identify and configure the key components that are used to deliver Field Service and mobile solutions. Key topics include identifying what a typical work order lifecycle looks like as well as the organizational considerations that will drive configuration decisions. Additionally, this course will focus on components that are commonly used in relation to work orders including agreements, inventory components, purchasing, and mobility strategies.

This course helps students better understand the bigger picture and end goals focused around work order delivery and execution that aid in designing more efficient solutions that align with customer and organizational goals.

At course completion

After completing this course, you will be able to:

- Identify the key areas involved in a work order lifecycle.
- Generate agreements that can be used to automatically create work orders.
- Leverage the inventory management capabilities of Dynamics 365 for Field Service.
- Create and work Purchase Orders through their lifecycle.
- Deploy and Configure the Field Service Mobile Application.

Course Outline

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

Prerequisites

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