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 bookable resources

Lessons

- Configure Microsoft Dynamics 365 Field Service

- Configure bookable resources

- Schedule crews, facilities, and resource pools

After completing this module, students will be able to:

- Configure Field Service

- Configure bookable resources

- Configure and schedule crews, facilities and resource pools

Module 2: Manage work orders

In this module, we will explore work orders, incident types and inspections.

Lessons

- Work order management, agreements, inventory and purchasing

- Manage incident types

- Inspections

After completing this module, students will be able to:

- Handle work orders, agreements, inventory and purchasing

- Mange incident types

- Create and manage inspections

Module 3: Schedule and dispatch work orders

In this module, we will learn how to work with the schedule board to schedule and dispatch work orders

Lessons

- Manage scheduling options

- Customize the schedule board

- Deploy Resource Scheduling Optimization (RSO)

After completing this module, students will be able to:

- Schedule and dispatch work orders

- Customize the schedule board

- Deploy RSO

Module 4: Field Service Mobile App

In this module, we will learn how customize and configure the Field Service mobile app.

Lessons

- Get started with the Field Service mobile app

- Customize and configure the mobile app

- Integrate Remote Assist

After completing this module, students will be able to:

- Customize and configure the Field Service mobile app

- Integrate Remote Assist

Module 5: Manage inventory and purchasing

In this module, we will learn how to manage inventory and purchasing in work orders

Lessons

- Configure Field Service work orders

After completing this module, students will be able to:

- Configure work orders

- Manage inventory using inventory management and warehouse management

- Make inventory adjustments and transfers

Module 6: Implement assets and connected devices

In this module, we will introduce Connected Field Service, customer assets and creating work orders from IoT data

Lessons

- Customer assets

- Create work orders from IoT data

After completing this module, students will be able to:

- Create and associate customer assets

- Create work orders from IoT data using Connected Field Service

Module 7: Microsoft Power Platform and Field Service

In this module, we will learn how to use the Microsoft Power Platform to create custom apps to enhance your Field Service solution

Lessons

- Create custom apps

- Gather feedback with Customer Voice

After completing this module, students will be able to:

- Create custom apps for Dynamics 365 Field Service

- Gather customer feedback using Customer Voice