



Course 81065 • Microsoft Dynamics 365 Field Service Workshop (CRM)

Length

- 1 day

Prerequisites

- Dynamics 365 Customer Service Workshop is helpful—as Field Service pulls information from the Customer Service module.

Audience

- Organizations using Dynamics 365 or CRM 2016 you need to learn how to use the Field Service application.
- Field Service Managers, Professional consultants, system integrators, and support professionals who work with Dynamics 365 or CRM 2016.

What You'll Learn

- Schedule and track work-in-progress
- Manage Customer Interactions
- Improve profitability by optimizing schedules
- Manage Contracts and Service scheduling
- Manage inventory and Purchasing
- Configure and Manage Mobile Devices
- Configure Alerts and responses

This workshop provides you with the skills to manage the Field Service modules in Microsoft Dynamics 365 (CRM 2016). Your organization may already own Field Service but you need to know how to set it up.

This one-day, instructor-led, workshop provides you with the skills to administer and maintain Field Service. Additionally, it is useful for individuals who manage the Dynamics 365 (CRM) infrastructure or develop applications to extend Dynamics 365 (CRM).

Workshop Outline

Module 01: Introduction to Dynamics 365 Field Service

- The case for field Service
- Examples of companies who improved by using Dynamics Field Service
 - Sales: Technicians can identify and create opportunities in the field for sales teams.
 - Project Service Automation: Use the same resource pool for short or long-term projects.
 - Customer Service: Accept customer concern calls through phone, email, social, or chat.
 - Operations: Automate warehouse processes.
 - Marketing: Technicians can update customer information to deliver personalized content
- Field Service Process Flow

Module 2: Setup and Configuration

- Deploying the Dynamics 365 Field Service Solution
- Factors to be considered in Planning Field Service Implementations
- Setup and Configure Field Service
- Field Service Security Profiles (roles)

- Detail Initial Configuration Settings
- Demonstrate Setting up Field Service Resources
- Explore how to use Products and Price Lists in Field Service

Module 03: Work Order Management

- The Work Order Management Process
- Explain Scheduling and Dispatching in Field Service
- The Work Order Life Cycle
- The Records that are Used with Work Orders
- Customer Assets in Field Service

Module 04: Agreements

- Agreements in Field service
- Defining agreements
- Agreement bookings
- Create and Manage Agreements
- Define Bookings and Invoices
- Planning for scheduled Maintenance
- Customer Assets are used in Field Service

Module 05: Scheduling and Dispatching

- Detail the different scheduling options in Field Service
- Manually Scheduling, the Schedule Assistant, Automatic Scheduling
- Demonstration working with the Schedule Board
- Demonstrate using the Schedule Assistant
- Explain Resource Scheduling Optimization

Module 06: Inventory and Purchasing

- The Purchasing Process
- Customer assets
- Working with Inventory
- Managing inventory
- Purchasing
- Processing returns
- Managing Adjustments and Transfers

Module 07: Mobility

- Different scheduling options in Field Service
- Working with the Schedule Board
- Using the Schedule Assistant
- Resource Scheduling Optimization

Module 08: Field Service and Customer Service

- Customer Management in Customer Service
- Service Contracts and Warranties
- Transfer between Customer Service and Field Service

Review Workshop

- Dynamics 365 Field Service
- Setup and Configuration
- Work Order Management
- Agreements
- Scheduling and Dispatching
- Inventory and Purchasing
- Mobility
- Field Service and Customer Service
- Review Microsoft Dynamics 365 Field Service Exam MB2-877