

Field Service for Dynamics 365

Course Level: 200

This instructor-led course provides a key step for Microsoft Dynamics 365 administrators and customizers whose organization's mobile workforce will be leveraging the Field Service module of Microsoft Dynamics 365. After using and configuring Dynamics 365 this course will provide attendees with the knowledge needed to administer the Field Service module necessary to set up, configure, and management of both the client and mobile platforms. Learn these concepts through lecture, hands-on-labs, and real world scenarios.

DYNAMICS 365
UNIVERSITY 



At A Glance: Field Service for Dynamics 365

Why Enroll?

Learn to configure, setup, and administer Field Service for Dynamics 365.



Who to Enroll?

System Administrators -
Application Administrators -



Key Takeaways

Overview; Setup; General Settings;
Core Functionality and Configuration;
Reporting and Analytics; Field Service
Mobile



Learn More

Click to register for Field
Service training.

[Click to Register.](#)

About this Training



Intended Audience

This course is designed to support individuals who will be setting up and administering Field Service within Dynamics 365. It is not intended for front of house users.



Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are *highly* advised to ensure a successful learning experience:

- Understanding of data or relational databases is helpful
- Dynamics 365 University CRM Boot Camp is recommended

Key Takeaways

This Training Will Allow You To:

- Understand configuration and set up
- Understand the concepts for the field service module including: resource set up, schedule board, service and incident type
- Understand the administration and customization of the schedule board
- Understand the mobile user interface



DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

OVERVIEW & SETUP

Field Service Refresher

Service in CRM

Prerequisites

- CRM Org
- Network Requirements

Solution Deployment

Licensing and Security

- Field Service Trial license
- Resco license
- CRM User Security and roles

Sample Data deployment

- Review sample data
- Configuration migration tool overview
- Import data
- Confirm deployment

FIELD SERVICE GENERAL SETTINGS

Entity diagram

What's in CRM, what's in Field Service?

Administration settings

CORE FUNCTIONALITY & CONFIGURATION

Accounts

- Service Accounts
- Billing Accounts

Work Orders

- Configuration
- Relationship model
 - Service Tasks
 - Products
 - Skills
- Incident Types

Agenda is tentative and subject to changes based upon learner comprehension, instructor's discretion, and other factors. Order, pace, content, and timeline subject to change.

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DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

Core Functionality (cont.)

Resources

- Configuration
- Crews and pay types
- **Using CRM Cases**
 - CRM SLA's

Equipment and Agreements

- Configuration
- Relating
- Invoicing

Scheduling



DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

REPORTING AND ANALYTICS

Leverage CRM charts and dashboards

Define KPIs and Metrics

Extend with Power BI

- Download Power Desktop
- Connect to CRM
- Create a Power BI Dashboard

FIELD SERVICE MOBILE

Functionality overview

Using the mobile emulator

Users and security

Configuration

Use cases in the field

Advanced topics

DYNAMICS 365 UNIVERSITY

Dynamics 365 University is designed to be **foundational training for those responsible for implementing and supporting Dynamics 365** within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality **training for your core team**. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to **support your unique organizational processes**.

GET STARTED