

# MB-240: Microsoft Dynamics 365 Field Service [MB-240T00-A] training including Exam Voucher

## Group Training

Training code	CGAMB240CE
Spoken Language	English
Language Materials	English
Dayparts	6
Price	€1.450,00 excl. VAT No extra costs.

## What is MB-240: Microsoft Dynamics 365 Field Service [MB-240T00-A] including Exam Voucher

Candidates for this exam are Microsoft Dynamics 365 Customer Engagement Functional Consultants with Field Service expertise. Candidates are responsible for implementing solutions that manage resources which complete the field service lifecycle.

Candidates implement the field service processes designed in collaboration with internal and external teams. This collaboration includes configuring the default administration areas of the Field Service application, deploying the Connected Field Service (IoT) solution and the mobile application, and implementing any additional customizations needed. Candidates are responsible for the configuration and deployment of the Field Service application in conjunction with the core customer service application. Candidates must have knowledge of how to configure and customize components of the Field Service application, including configuring services, resources, characteristics, incidents, inventory integration, service agreements, resource scheduling, work orders, service tasks, field service user roles, field service settings, the Connected Field Service (IoT) solution, and configuration of the Field Service Mobile application. Candidates must be familiar with the Microsoft Power Apps-based mobile application. The Xamarin-based mobile application will not be covered on this exam.

This course uses MOC (Microsoft Official Courseware) and will be given by an experienced MCT (Microsoft Certified Trainer).

See the below modules for more information:

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

## 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

## 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

## 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

## 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

## 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

## 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

## 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

## 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

## 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

## 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

## 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

## Who should attend MB-240: Microsoft Dynamics 365 Field Service [MB-240T00-A] including Exam Voucher

This course is designed for IT professionals with experience or interest in delivering Field Service solutions for large-scale customers.

This training prepares you for the exam that measures your ability to accomplish the following technical tasks: configure field service applications; manage work orders; schedule and dispatch work orders; manage field service mobility; manage inventory and purchasing; and implement Connected Field Service.

Also, you will receive an Exam Voucher. Enlist today!

### Prerequisites

No prerequisites required.

### Objectives

After completing this course, you will be able to:

Identify the key components involved in Field Service Implementations.

- Define the products and services that will be delivered to customers.
- Determine which pricing options to use in specific scenarios.
- Determine which resources are required.
- Create and manage products and services
- Configure tax codes for your organization
- Configure resource scheduling for your organization
- Define account preferences and enable location mapping
- Define bookable resources
- Create pools and crews and manage facility records
- Create an incident for common service tasks and schedule using incidents
- Configure work orders and schedule resources using work orders
- Use an agreement to schedule work orders and generate invoices for customers
- Create customer asset records and manage inventory, purchasing and returns
- Manage mobile projects
- Install, deploy the mobile client and describe the value of the mobile app for a mobile workforce
- Describe Universal Resource Scheduling and enable an entity for URS
- Configure and use the schedule board to schedule resources
- Reschedule work orders and substitute resources
- Customize the schedule board, create additional boards and add views to a schedule board
- Define optimization for an organization and schedule single resources

### Exam information

- Exam duration (minutes): 120
- % extra time for non-native speakers: -
- Number of exam questions: 40-60
- Minimum correct questions: variable
- Exam style: Multiple choice
- Open book: No

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