

## **MB-240: Microsoft Dynamics 365 Field Service**

### Content

#### *Module 1: Configure Field Service*

This module introduces the configuration of the Field Service application, including defining products, services, and tax codes.

##### **Lessons:**

- Introduction to Configuring Field Service
  - Defining Products and Services
  - Defining Tax Codes
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#### *Module 2: Resource Scheduling Configuration*

Learn how to configure resource scheduling, including mapping, location information, resource components, and account preferences.

##### **Lessons:**

- Mapping and Location Information
  - Configuring Resource Components
  - Defining Account Preferences
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#### *Module 3: Defining and Configuring Bookable Resources*

This module covers defining bookable resources, including resource pools, crews, and facilities.

##### **Lessons:**

- Defining Bookable Resources
  - Resource Pools, Crews, and Facilities
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### *Module 4: Configure Incidents*

Learn how to create and manage incidents within Field Service, including using service tasks.

**Lessons:**

- Creating an Incident
  - Using Service Tasks
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### *Module 5: Inventory and Work Order Management*

This module covers the configuration, creation, and management of Field Service work orders.

**Lessons:**

- Configure Field Service Work Orders
  - Creating Work Orders
  - Managing Work Orders
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### *Module 6: Field Service Agreements*

Understand Field Service agreements, including setting up bookings and invoices.

**Lessons:**

- Using Field Service Agreements
  - Set Up Bookings
  - Set Up Invoices
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### *Module 7: Inventory and Purchasing*

This module focuses on managing customer assets, inventory, and handling purchasing and returns.

**Lessons:**

- Manage Customer Assets
  - Manage Inventory
  - Purchasing and Returns
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### ***Module 8: Field Service Mobile***

Learn about the Field Service mobile client, including installation, deployment, and management of mobile projects.

#### **Lessons:**

- Mobile Client Overview
  - Install and Deploy Field Service Mobile Projects
  - Manage Mobile Projects
  - Deploy the Mobile Client
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### ***Module 9: Universal Resource Scheduling***

Explore Universal Resource Scheduling (URS) including its overview, configuration, and customization of entities.

#### **Lessons:**

- URS Overview and Configuration
  - Enabling Entities for URS
  - Customize Entities for URS
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### ***Module 10: Managing Scheduling Options***

Learn how to use the schedule board, schedule items, reschedule resources, and manage crew and pool scheduling.

#### **Lessons:**

- Using the Schedule Board
  - Schedule Items
  - Rescheduling and Substituting Resources
  - Crew and Pool Scheduling
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### ***Module 11: Customizing the Schedule Board***

Customize the schedule board, including creating additional boards, using views, and configuring queries and filters.

#### **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
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### *Module 12: Advanced Scheduling Options*

This module delves into advanced scheduling options, including resource scheduling optimization and defining optimization goals, scopes, and profiles.

#### **Lessons:**

- Working with Resource Scheduling Optimization
- Defining Optimization Goals
- Defining Optimization Scopes
- Defining Optimization Profiles
- Single Resource Scheduling