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Learning Style: Virtual Classroom
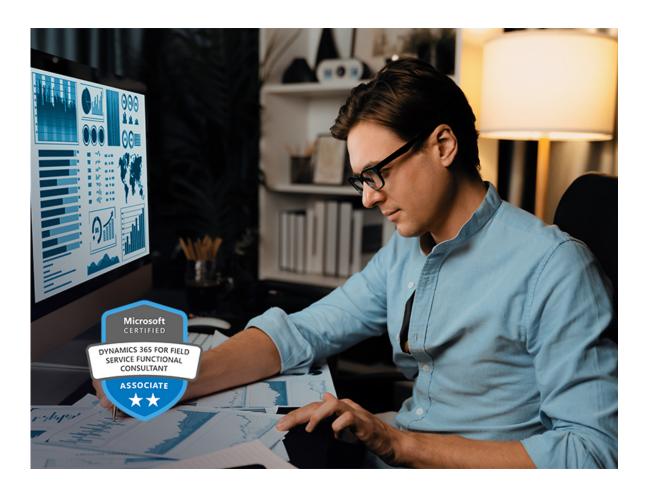
Technology: Microsoft

Difficulty: Intermediate

Course Duration: 4 Days

Next Course Date: July 28, 2025

Dynamics 365 Field Service Certification: Dynamics 365 for Field Service (MB-240)

If you enroll in this course at the listed price, you receive a Free Official Exam Voucher for the MB-240 Exam. This course does not include Exam Voucher if enrolled within the Master Subscription, however, you can request to

purchase the Official Exam Voucher separately.

About this Course:

Businesses heavily rely on mobile-based workforces for product and services delivery and require to implement Dynamics 365 features and functionalities. Configuring Field Service with Dynamics 365 allows businesses to improve their market position and help in effective scheduling and identification of resources for better management of workloads. On average, a Microsoft Dynamics Consultant earns $102,330 annually. This course covers the identification, configuring, and execution of the key components used in delivering Field Service & Mobile Solutions. It also shed light on Work Order Lifecycle, Inventory Components, Agreements, and Mobility & Purchasing Strategies.

Course Objectives:

The core objective of this course is to help professionals gain a better understanding and sound knowledge of the following key principles:

- Field Service Implementation Key Components Identification
- Describing Services, Products, and Customer Deliverables
- Identifying the Best Pricing Option and Required Resources
- System Configuration in Accordance with Resource Requirements
- Key Areas Identification in a Work Order Lifecycle
- Automatically Developing Work Orders by Agreement Generation
- Microsoft Dynamics 365 for Field Service Inventory Management Capabilities
- Developing Purchase Orders with the help of Lifecycle
- Field Service Mobile Application Deployment and Configuration
- Leveraging Scheduling Features by Application Configuration
- Locating and Scheduling Resources through Scheduling Features
- Satisfying Organizational Needs by Modifying the Application
- Scheduling Single and Multiple Resources by Solution Development
- Universal Resource Scheduling and Extension Options Identification

Audience:

This course is specifically tailored for the following group of professionals and interested candidates:

- Microsoft Dynamics 365 Consultant
- Information Workers & IT Professionals

Prerequisites:

Professionals planning to enroll in this course must have the fundamental knowledge of Microsoft Dynamics 365 navigation, functionalities, and features.

Course Outline:

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

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