

# Microsoft Dynamics 365

## The Complete Business Computing Solution



# MB – 240

## Microsoft Dynamics 365 Field Service Functional Consultant

### Overview

As a candidate for this exam, you're a Microsoft Dynamics 365 Field Service functional consultant. You're responsible for implementing solutions that:

- Schedule resources to meet customer requirements.
- Optimize resources by matching skills, locations, and availability.
- Equip frontline workers with the information and tools to deliver great service.
- Build a service history of customer assets.

You're responsible for:

- Configuring the default administration areas of the Field Service application.
- Configuring resources and scheduling.
- Configuring service agreements and booking setups.
- Managing work orders, incident types, and booking setups.
- Managing customer assets.
- Deploying and configuring the Field Service mobile app.
- Tailoring Field Service based on customer requirements.

As a candidate, you should have a basic understanding of field service principles and the role the Field Service app plays in relationship to the Dynamics 365 suite of applications, including integration of:

- Microsoft Power Platform
- Dynamics 365 Customer Service
- Microsoft 365 apps
- Microsoft Teams
- Dynamics 365 Remote Assist
- Dynamics 365 Guides
- Microsoft Azure IoT

You should understand:

- Industry terminology
- Field service processes
- Work order lifecycle
- Best practices

## Prerequisites

Participants interested in taking the MB-240 course should meet the following prerequisites to ensure they can fully benefit from the course content:

- Basic Understanding of CRM Concepts
- Experience with Microsoft Dynamics 365
- General IT Knowledge
- Experience in Field Service Operations

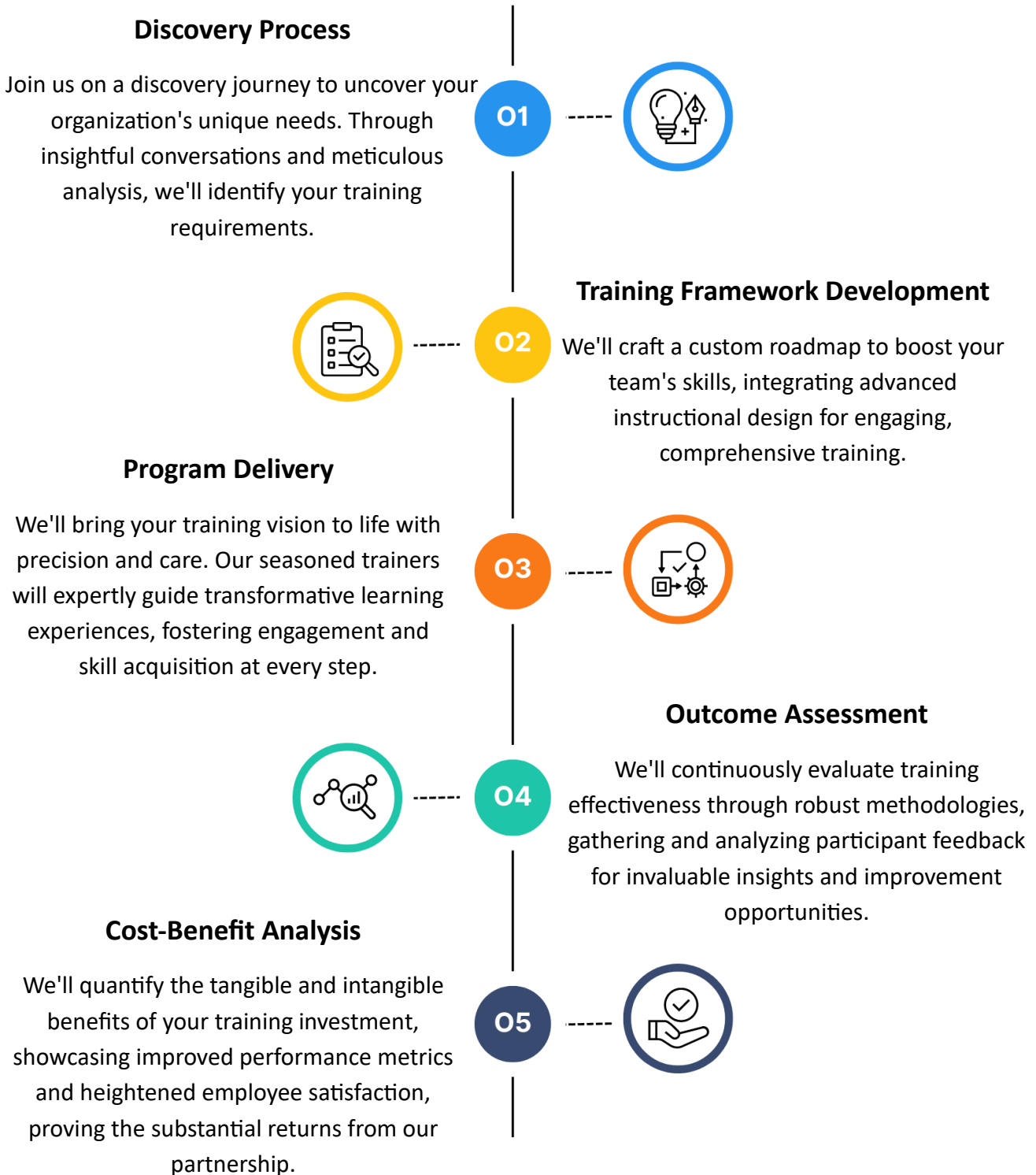
## Course Level

- Intermediate

## Course Duration

- 4 Day – 32 Hours

# Creating Tailor - Made Training Programs to Meet Your **Specific Goals**



## Course Outline

The MB-240 course is designed for functional consultants who implement solutions in Dynamics 365 Field Service. This course covers the configuration and management of field service applications, focusing on optimizing field operations, enhancing service efficiency, and improving customer satisfaction through effective use of Dynamics 365 Field Service.

### Module 1: Configure Field Service applications

- Lesson: Configure Microsoft Dynamics 365 Field Service
- Lesson: Configure bookable resources
- Lesson: Schedule crews, facilities, and resource pooling
- **Lab 2:** Skills and characteristics
- **Lab 3:** Creating resources

### Module 2: Manage Work Orders

- Lesson: Work order management
- Lesson: Manage incident types
- Lesson: Create and perform inspections
- **Lab 4:** Incident types
- **Lab 5:** Work order management
- **Lab 6:** Agreements
- **Lab 7:** Inspections

### Module 3: Schedule and dispatch work orders

- Lesson: Manage scheduling options
- Lesson: Configure schedule boards
- Lesson: Resource Scheduling Optimization
- **Lab 8:** Scheduling

### Module 4: Manage the Field Service mobile app

- Lesson: Get started with the Dynamics 365 Field Service Mobile application
- Lesson: Customize and configure the Dynamics 365 Field Service Mobile app
- Lesson: Integrate Dynamics 365 Remote Assist with Dynamics 365 Field Service
- **Lab 10:** Field Service mobile app

### Module 5: Manage inventory and purchasing

- Lesson: Manage inventory and warehouses
- Lesson: Manage purchasing and returns
- **Lab 11:** Inventory

**Module 6: Implement assets and connected devices**

- Lesson: Customer assets
- Lesson: Connected Field Service
- **Lab 12:** Customer assets

**Module 7: Power Platform for Field Service**

- Lesson: Create custom apps for Dynamics 365 Field Service

## Indus Tech Services

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### Who We Are....

Indus Tech Services is an IT company that specializes in providing comprehensive training, consulting & implementation services for software solutions designed to address the diverse business challenges faced by organizations today. With a passion for technology and a deep understanding of business processes, Indus Tech is committed to empowering businesses to optimize their operations, boost productivity, and drive sustainable growth.

### Why Choose Us...

From time to time, life serves up a profound nudge, urging us to step beyond our routines and make a difference in the world. Indus Tech Services emerged from one such compelling wake-up call. We are not just a company; we are a dedicated force with a belief in providing solutions to organizations, regardless of their size, and we infuse a human touch into everything we do.

### Our Expertise

With over 25 years of collective experience navigating the intricacies of daily business transactions, irrespective of geographical, cultural, time zone, or language barriers, our team has honed their expertise to meet any challenge head-on. This wealth of experience has armed our resources with an unparalleled understanding and skill set to tackle a broad spectrum of obstacles.

### Training

With two decades of unwavering commitment and a global footprint, our company is a true pioneer in the fields of linguistic, transactional, technical, and behavioural training for some of the world's largest corporate entities. Our unparalleled expertise has been refined through years of dedication and innovation, making us the go-to choice for businesses seeking transformative training solutions.

## Consulting

Our company has been at the forefront of providing world-class IT consulting services to organizations spanning the globe. With an extensive and proven track record, we have honed our expertise to meet the ever-evolving technological needs and challenges faced by businesses, regardless of their scale or industry.

## Implementation

Our experience covers a broad spectrum of IT implementation services, including system integration, software deployment, network architecture, cloud migration, and infrastructure setup. We understand that the successful execution of IT projects is pivotal to an organization's growth and efficiency. Therefore, we bring a depth of knowledge and a commitment to delivering results that set us apart.

To know more contact us at [info@industechservices.com](mailto:info@industechservices.com) or call us at +91 - 99961 61170.