

# Dynamic 365 Field Service

# Online Course



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# Dynamic 365 Field Service

## Course Modules



### 1: Introduction to Dynamics 365 Field Services:

- Overview of the Dynamics 365 ecosystem
- Intro to Dynamics 365 Field Service & its role in srvc mgmt

### 2: Navigating Dynamic 365 Field Service:

- Interface & navigate wthn the Dynamics 365 Field Srvice app
- Access and managing work orders, schedules, and resources

### 3: Work Order Management:

- Creating and managing work orders
- Work order lifecycle and status tracking

### 4: Resource Management:

- Manage field service resources
- Technicians, vehicles, equipment
- Resource scheduling and optimization

### 5: Schedule and Dispatch:

- Optimizing field service schedules
- Dispatching and managing work orders efficiently





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## 6: Inventory Management:

- Managing inventory and stock for field service operations
- Order fulfillment and replenishment processes

## 7: Customer Engagement:

- Customer communication and engagement
- Managing customer information and service history

## 8: Mobile Field Service:

- Using mobile apps for field service activities
- Real-time updates and communication in the field

## 9: Service Agreements:

- Creating and managing service agreements
- Preventive maintenance planning

## 10: Connected Field Service:

- IoT integration for monitor and proactive maintenance
- Predictive maintenance and alerts

## 11: Billing and Invoicing:

- Generating invoices for field service activities
- Billing and payment processes

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## 12: Analytics and Reporting:

- Analyzing field service performance
- Generating reports and dashboards

## 13: Integration with Other Modules:

- Intgrte Dynamics 365 Field Service wth other Dynamics 365
- Integration with Power Platform and other Microsoft tools

## 14: Customization and Configuration:

- Customizing forms, views, and reports
- Configuring business processes and workflows

## 15: Security and Access Control:

- Managing user roles and permissions
- Ensuring data security and compliance

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