Contents

1 MB-240 - Dynamics 365 for Field Service

- **Download Latest Student Handbook and AllFiles Content**
- **Are you a MCT?** - Have a look at our GitHub User Guide for MCTs
- **Need to manually build the lab instructions?** - Instructions are available in the MicrosoftLearning/Docker-Build repository

1.1 What are we doing?

- To support this course, we will need to make frequent updates to the course content to keep it current with the Azure services used in the course. We are publishing the lab instructions and lab files on GitHub to allow for open contributions between the course authors and MCTs to keep the content current with changes in the Azure platform.
- We hope that this brings a sense of collaboration to the labs like we've never had before - when Azure changes and you find it first during a live delivery, go ahead and make an enhancement right in the lab source. Help your fellow MCTs.

1.2 How should I use these files relative to the released MOC files?

- The instructor handbook and PowerPoints are still going to be your primary source for teaching the course content.
- These files on GitHub are designed to be used in conjunction with the student handbook, but are in GitHub as a central repository so MCTs and course authors can have a shared source for the latest lab files.
- It will be recommended that for every delivery, trainers check GitHub for any changes that may have been made to support the latest Azure services, and get the latest files for their delivery.

1.3 What about changes to the student handbook?

- We will review the student handbook on a quarterly basis and update through the normal MOC release channels as needed.

1.4 How do I contribute?

- Any MCT can submit a pull request to the code or content in the GitHub repro, Microsoft and the course author will triage and include content and lab code changes as needed.
- You can submit bugs, changes, improvement and ideas. Find a new Azure feature before we have? Submit a new demo!

1.5 Notes

1.5.1 Classroom Materials

1.6 It is strongly recommended that MCTs and Partners access these materials and in turn, provide them separately to students. Pointing students directly to GitHub to access Lab steps as part of an ongoing class will require them to access yet another UI as part of the course, contributing to a confusing experience for the student. An explanation to the student regarding why they are receiving separate Lab instructions can highlight the nature of an always-changing cloud-based interface and platform. Microsoft Learning support for accessing files on GitHub and support for navigation of the GitHub site is limited to MCTs teaching this course only.

1.7 title: Online Hosted Instructions permalink: index.html layout: home

2 Content Directory

Hyperlinks to each of the lab exercises and demos are listed below.

2.1 Labs

{% assign labs = site.pages | where_exp:"page", "page.url contains '/Instructions/Labs'" %} | Module | Lab | | --- | --- | {% for activity in labs %}| {{ activity.lab.module }} | [{{ activity.lab.title }}{% if activity.lab.type %} - {{ activity.lab.type }}{% endif %}](/home/ll/Azure_clone/Azure_new/MB-240-Dynamics365forFieldService/{{ site.github.url }}{{ activity.url }}) | {% endfor %}

2.2 Demos

2.3 {% assign demos = site.pages | where_exp:"page", "page.url contains '/Instructions/Demos'" %} | Module | Demo | | --- | --- | {% for activity in demos %}| {{ activity.demo.module }} | [{{ activity.demo.title }}](/home/ll/Azure_clone/Azure_new/MB-240-Dynamics365forFieldService/{{ site.github.url }}{{ activity.url }}) | {% endfor %}

2.4 lab: title: 'Lab: Validate lab environment' module: 'Module 0: Course introduction'

3 Module 0: Course introduction

3.1 Practice Lab - Validate lab environment

3.2 Scenario

Worldwide Industries (WWI) provides IT and networking services to their customers. Their services range from phone system and network installations to telephoning systems and security system installations. They are going to be leveraging Dynamics 365 for Field Service for installation and servicing of these systems for their customers. You are the system implementor that has been tasked with configuring the application to support the rollout of the application. You will be adding and configuring some products that can be installed and setting up skills and characteristics that will be used as part of the implementation.

In this Module 0 lab, you will validate that your classroom tenant is working as expected. You will access your individual credentials, record your "alias", and open the Dynamics 365 model-driven application that we will be using throughout the course.

Important Note: This lab will provide you with an actual Dynamics 365 tenant and licenses for the Power Platform applications you will be using in this course. Please be aware that the Power Platform is evolving all the time. The instructions in this document may be different from what you experience in your actual tenant. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

3.3 Exercise 1 - Access the Dynamics 365 application

3.3.1 Task 1 – Log into the Power Platform admin center

1. Access https://admin.Powerplatform.microsoft.com and log in with your user credentials.
2. Record your user credential up to the @ symbol on a scratch piece of paper or in Notepad. This will be your lab alias that you will use to differentiate the data you create within the shared Dynamics 365 organization.

Important: Please be aware that this tenant and the Dynamics 365 organization will be shared with the other students in your classroom, like employees would share a tenant when using the Dynamics 365 instance belonging to their organization. Do not use any PII (personally identifiable information) when creating records. It is also good practice to use your username prefix (ex., **mollyc**) in front of all records, data, apps, flows, etc. you create.

3. Feel free to explore the Power Platform admin center but **do not make any changes.**

3.3.2 Task 2 – Access the Dynamics 365 application

1. Expand the grid button at the top left of the screen, directly to the left of **Power Platform admin center.** Select **Environments.**
2. Select the **Contoso (Production)** environment.

3. Go to the environment URL.
4. From the list of available Dynamics 365 apps, select **Field Service**
5. Spend a few minutes exploring the application.

3.4 lab: title: 'Lab: Configure Dynamics 365 Field Service' module: 'Module 1: Configure Field Service'

4 Practice Lab 1 - Configure Dynamics 365 Field Service

4.1 Scenario

Worldwide Industries (WWI) provides IT and networking services to their customers. Their services range from phone system and network installations to telephoning systems and security system installations. They are going to be leveraging Dynamics 365 for Field Service for installation and servicing of these systems for their customers. You are the system implementor that has been tasked with configuring the application to support the rollout of the application. You will be adding and configuring some products that can be installed and setting up skills and characteristics that will be used as part of the implementation.

5 Exercise 1 – Map Configuration

5.1 Task 1 - Enable Bing Maps to use with Resource Scheduling

To ensure that you are able to take full advantage of the full scheduling and mapping capabilities available with Field Service, you need to ensure that it is configured to use a mapping provider. Bings Maps is the default map provider, but additional providers could be enabled. We will be using Bing Maps.

1. In **Dynamics 365**, click the arrow next to the **Dynamics 365** text, and select **Resource Scheduling**.
2. Click the **Site Map** icon in the bottom left corner to expand. Click on **Settings.** From the menu that appears, select **Administration**.
3. Select **Scheduling Parameters**.
4. Locate the **Connect to Maps** field and set it to **Yes**. (Select OK from the popup)
5. **Save and Close** the settings.

6 Exercise 2 - Configure Dynamics 365 for Field Service

In this exercise, you will be modifying and configuring several Field Service settings that will be used throughout the application. This will include defining Skills & Certifications, Territories, Resources, and more.

6.1 Task 1 - Define Territories

1. Switch applications from Resource Scheduling to **Field Service.** Click the **Site Map** icon in the bottom left corner to expand. Click on **Settings.**
2. In the left column, click **Territories.**
3. Click **New**.
4. Enter [**your prefix ex. mollyc**]+ **North** for **Name** and click **Save**. After saving, click **New**
5. Enter [**your prefix ex. mollyc**]+ **South** for **Name** and click **Save.** After saving, click **New**.
6. Create two more Territories and name them [**your prefix ex. mollyc**]+ **East** and [**your prefix ex. mollyc**]+ **West**.
7. You will now have four additional Territories.

7 Exercise 3 - Create Service Based product, and Add to Price List

7.1 Task 1 - Add Printer Products

1. Using the **Sitemap**, select **Products** under **General.**
2. Click the **Add Product** to create a Product
3. Define the Details of the Product as noted below:

- **Name:** *[your prefix ex. mollyc]+ Remote Printer*
- **Product ID:** *[your prefix ex. mollyc]+ Print-Serv-1234*
- **Unit Group:** *Default Unit*
- **Default Unit:** *Primary Unit*
- **Decimals Supported:** *2*

4. Select the **Field Service** tab, set the Field Service Product Type to **Inventory**
5. Set the **Taxable** field to **No**
6. Save the product, and click **Publish** (Click **Confirm** on the popup)
7. Click **Save & Close**

---

1. Click the **Add Product** to create a Product
2. Define the Details of the Product as noted below:

- **Name:** *[your prefix ex. mollyc]+ Monthly Printer Maintenance*
- **Product ID:** *[your prefix ex. mollyc]+ Print-Maint4*
- **Unit Group:** *Default Unit*
- **Default Unit:** *Primary Unit*
- **Decimals Supported:** *2*

3. Select the **Field Service** tab, set the Field Service Product Type to **Non-Inventory**
4. Set the **Taxable** field to **No**
5. Save the product. (you may see an error that a price list was not set. You can ignore this.) Click **Publish** (Click **Confirm** on the popup)
6. Click **Save & Close**

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1. Click the **Add Product** to create a Product
2. Define the Details of the Product as noted below:

- **Name:** *[your prefix ex. mollyc]+ Printer Service Fee*
- **Product ID:** *[your prefix ex. mollyc]+ Printer-Service-Fee*
- **Unit Group:** *Default Unit*
- **Default Unit:** *Primary Unit*
- **Decimals Supported:** *2*

3. Select the **Field Service** tab, set the Field Service Product Type to **Service**
4. Set the **Taxable** field to **No**
5. Save the product, and click **Publish** (Click **Confirm** on the popup)

7.2 Task 2 - Add Printer Products to a Price List

1. Using the **Sitemap**, select **Price Lists** under **General.**
2. Open the **Default Price List** (Note: Change the view to **All Price Lists** if it is not already showing)
3. Click **Activate** to activate the **Default Price List** if it is not already active.
4. In the **Price List Items** tab, click the **+ New Price List Item** button to add a Price List Line Item
5. Enter the following information:
    1. **Product:** *[your prefix ex. mollyc]+ Remote Printer*
    2. **Unit:** Primary Unit
    3. Click the **Pricing Information** tab
    4. **Pricing Method:** Currency Amount
    5. **Amount:** $1000.00
    6. Click **Save & Close**

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1. In the **Price List Items**, click the **+ New Price List Item** button to add a Price List Line Item
2. Enter the following information:
    1. **Product:** *[your prefix ex. mollyc]+ Monthly Printer Maintenance*
    2. **Unit:** Primary Unit
    3. Click the **Pricing Information** tab
    4. **Pricing Method:** Currency Amount
    5. **Amount:** $750.00
    6. Click **Save and Close**

---

1. In the **Price List Items**, click the **+ New Price List Item** button to add a Price List Line Item
2. Enter the following information:
    1. **Product:** *[your prefix ex. mollyc]+ Printer Service Fee*
    2. **Unit:** Primary Unit
    3. Click the **Pricing Information** tab
    4. **Pricing Method:** Currency Amount
    5. **Amount:** $150.00
    6. Click **Save and Close**
3. Close the Default Price List by clicking **Save & Close**

7.3 lab: title: 'Lab: Skills and characteristics' module: 'Module 2: Resource Scheduling Configuration'

8 Module 2 - Resource Scheduling Configuration

8.1 Practice Lab 2 - Skills and characteristics

8.2 Scenario

Worldwide Industries (WWI) provides IT and networking services to their customers. Their services range from phone system and network installations to telephoning systems and security system installations. They are going to be leveraging Dynamics 365 for Field Service for installation and servicing of these systems for their

customers. You are the system implementor that has been tasked with configuring the application to support the rollout of the application. You will be adding and configuring some products that can be installed and setting up skills and characteristics that will be used as part of the implementation.

9 Exercise 1 - Configure Dynamics 365 for Field Service Skills and Characteristics

Each technician that goes out to service customers may have a number of different skills and roles assigned to them. There are three primary roles that tech may have:

- Installation Specialist
- Site Inspector
- Security Analyst

Additionally, each technician may have specific skills or Certifications that relate to a specific product or service. The most common certifications might be any of the following:

- **CISM:** Certified Information Security Manager.
- **CISSP:** Certified Information Systems Security Professional.
- **G SEC:** GIAN Security Essentials

Since some of your customers are government agencies, technicians may need to have specific security clearance levels. These can range from Level one to Level five.

9.1 Task 1 – Create a Security clearance Proficiency Model

In this task you will create a proficiency model that contains the five different security clearance levels that can be applied.

1. In your Dynamics 365 organization, select the down arrow next to the **Dynamics 365** text, select **Resource Scheduling**.
2. Using the sitemap, select the **Settings**
3. Under **Resource**, select **Proficiency Models.**
4. From the Command Bar, select the **New** button.
5. In the **Name** field enter **[your prefix ex. mollyc]+ Security Level**.
6. Set the **Min Rating Value** to **1**.
7. Set the **Max Rating Value** to 5.
8. Click the **Save** button to save the record and leave it open.
9. In the **Rating Values** section, select the ellipsis and select **+ New Rating Value** button.
10. In the **Name** field, enter **[your prefix ex. mollyc]+ Level 1 Security**.
11. Set the **Value** field to **1**.
12. Ensure the **Rating Model** is set to **[your prefix ex. mollyc]+ Security Level** and click the **Save and Close** button.
13. Select the **+ New Rating Value** button.
14. In the **Name** field, enter **[your prefix ex. mollyc]+ Level 2 Security**.
15. Set the **Value** field to **2**.
16. Ensure the **Rating Model** is set to **[your prefix ex. mollyc]+ Security Level** and click the **Save and Close** button.
17. Select the **Add New Rating Value** button.
18. In the **Name** field, enter **[your prefix ex. mollyc]+ Level 3 Security**.
19. Set the **Value** field to **3**.

20. Ensure the **Rating Model** is set to [**your prefix ex. mollyc**]+ **Security Level** and click the **Save and Close** button.
21. Select the **Add New Rating Value** button.
22. In the **Name** field, enter [**your prefix ex. mollyc**]+ **Level 4 Security**.
23. Set the **Value** field to **4**.
24. Ensure the **Rating Model** is set to [**your prefix ex. mollyc**]+ **Security Level** and click the **Save and Close** button.
25. Select the **Add New Rating Value** button.
26. In the **Name** field, enter [**your prefix ex. mollyc**]+ **Level 5 Security**.
27. Set the **Value** field to **5**.
28. Ensure the **Rating Model** is set to [**your prefix ex. mollyc**]+ **Security Level** and click the **Save and Close** button.
29. Verify that the Security Level Model has 5 Security levels added to it.

9.2 Task 2 - Define your Security Clearance Skill

In this task you will create a building security skill that will be used in conjunction with the Proficiency Model you defined in the previous task.

1. In your Dynamics 365 organization, select the down arrow next to the **Dynamics 365** text, select **Resource Scheduling**.
2. Using the sitemap, select **Settings**
3. Under **Resource**, select **Skills**.
4. Select the **+New** button.
5. In the **Name** field, enter [**your prefix ex. mollyc**]+ **Building Security**
6. Set the **Characteristic Type** field to **Skill** and click the **Save** button.

9.3 Task 3 - Define your required Certification Characteristics

In this task you will be adding the **CISM:** Certified Information Security Manager, **CISSP:** Certified Information Systems Security Professional, and **G SEC:** GIAN Security Essentials certifications and resource skills.

1. In your Dynamics 365 organization, select the down arrow next to the **Dynamics 365** text, select **Resource Scheduling**.
2. Using the sitemap, select **Settings**
3. Under **Resource**, select **Skills**.
4. Select the **+New** button.
5. In the **Name** field, enter [**your prefix ex. mollyc**]+ **CISM**
6. Set the **Characteristic Type** field to **Certification** and click the **Save** button.
7. Select the **+New** button again.
8. In the **Name** field, enter [**your prefix ex. mollyc**]+ **CISSP**
9. Set the **Characteristic Type** field to **Certification** and click the **Save** button.
10. Select the **New** button one last time.
11. In the **Name** field, enter [**your prefix ex. mollyc**]+ **G SEC**
12. Set the **Characteristic Type** field to **Certification** and click the **Save** button.
13. Verify that [**your prefix ex. mollyc**]+ **CISM**, [**your prefix ex. mollyc**]+ **CISSP**, and [**your prefix ex. mollyc**]+ **G SEC** have all been added as Characteristics.

9.4 Task 4 - Define Resource Categories

In this task, you will be adding the Installation Specialist, Site Inspector, and Security Analyst resource roles.

1. In your Dynamics 365 organization, select the down arrow next to the **Dynamics 365** text, select **Resource Scheduling**.
2. Using the sitemap, select **Settings**
3. Under **Resource**, select **Roles**.
4. Select **+New**
5. In the **Name** field, enter **[your prefix ex. mollyc]+ Installation Specialist.**
6. Enter **[your prefix ex. mollyc]+ Installation Specialist** in the **Description** field as well and click the **Save** button.
7. Click **+New** button again.
8. In the **Name** field, enter **[your prefix ex. mollyc]+ Site Inspector.**
9. Enter **[your prefix ex. mollyc]+ Site Inspector** in the **Description** field as well and click the **Save** button.
10. Click **New** button one last time.
11. In the **Name** field, enter **[your prefix ex. mollyc]+ Security Analyst.**
12. Enter **[your prefix ex. mollyc]+ Security Analyst** in the **Description** field as well and click the **Save** button.
13. Verify that the [your prefix ex. mollyc]+ Security Analyst, [your prefix ex. mollyc]+ Installation Specialist, and [your prefix ex. mollyc]+ Site Inspector roles have been added.

9.5 lab: title: 'Lab: Resource configuration' module: 'Module 3: Defining and Configuring Bookable Resources'

10 Module 3 - Defining and Configuring Bookable Resources

10.1 Practice Lab 3 - Resource configuration

10.2 Scenario

Worldwide Industries (WWI) provides IT and networking services to their customers. Their services range from phone system and network installations to telephoning systems and security system installations. They are going to be leveraging Dynamics 365 for Field Service for installation and servicing of these systems for their customers. You are the system implementor that has been tasked with configuring the application to support the rollout of the application. You will be adding and configuring some products that can be installed and setting up skills and characteristics that will be used as part of the implementation.

11 Exercise 1 – Resource Configuration

11.1 Task 1 - Create a Bookable Resource for your user record

1. Using the **Sitemap**, select **Resources**
2. Click **New** button to create a new **Bookable Resource**.
3. Configure the new **Bookable Resource** record as follows:
   - **Resource Type:** *User*
   - **User:** *The Contact record you are signed in as (example **alans or Alan Steiner**)*
   - **Time Zone:** Leave the default value in the Time Zone Field.
4. Select the **Scheduling** tab.
5. Set the **Organizational Unit** field to **Seattle.**

6. In the **Start Location** field, select **Organizational Unit Address**.
7. In the **End Location** field, select **Organizational Unit Address**.
8. Select the **Field Service** tab
9. Set the **Hourly Rate** field to **175**.
10. **Save** the bookable resource record and leave it open.
11. Locate the **Characteristics** sub-grid, ensure the view is **Active Bookable Resource Characteristics** and select **+New** (note: change the form view to **Information** by clicking the dropdown arrow.)
12. Configure as follows:
    - **Characteristic:** *[your prefix ex. mollyc]+ Building Security*
    - **Rating Value**: *[your prefix ex. mollyc]+ Level 5 Security*
    - **Resource**: *your user*
    - Click **Save and Close** on the characteristic record.
13. Select **+New** Again
14. Configure as follows:
    - **Characteristic:** *[your prefix ex. mollyc]+ CISM*
    - **Rating Value**: *Proficient*
    - **Resource**: *your user*
    - Click **Save and Close** on the characteristic record.
15. Select **+New** Again
16. Configure as follows:
    - **Characteristic:** *[your prefix ex. mollyc]+ CISSP*
    - **Rating Value**: *Familiar*
    - **Resource**: *your user*
    - Click **Save and Close** on the characteristic record.

Select **Resources** from the sitemap

1. Select *your user*
2. Select the **Related** tab and select **Resource Category Assns**
3. Select **+New Bookable Resource Category Assn**
4. Configure as follows:
    - **Name:** *[your prefix ex. mollyc]+ Installation Specialist*
    - **Resource Category** *[your prefix ex. mollyc]+ Installation Specialist*
    - Click **Save and Close** on the Category record.
5. Select **+New Bookable Resource Category Assn** again.
6. Configure as follows:
    - **Name** *[your prefix ex. mollyc]+ Security Analyst*
    - **Resource Category:** *[your prefix ex. mollyc]+ Security Analyst*
    - Click **Save and Close** on the Category record.
7. **Save and Close** the bookable resource record**.**
8. Select *your user*
9. Select the **Related** tab.
10. From the menu that appears, select **Resource Territories**.

11. Click the **+New Resource Territory** button.
12. In the **Territory Lookup** field, select **WA**.
13. Select the **Save and Close** button.
14. Select the **Work Hours** tab. (Note: click the **Related** tab if you don't see it)
15. In the Calendar view, click **+New** dropdown arrow and select **Working hours**.
16. From the menu that appears, choose **Every Week** from the repeat field.
17. Ensure the Work Hour are set to **8:00 AM** to **5:00 PM**
18. Ensure **Sun** and **Sat** are unchecked, and **Mo** thru **Fr** are checked.
19. Click **Save**.
20. Verify that the schedule is showing 8:00 AM to 5:00 PM – Monday – Friday from today forward.
21. Click **Save & Close**.

11.2 lab: title: 'Lab: Incident types' module: 'Module 4: Configure Incidents'

12 Module 4 - Configure Incidents

12.1 Practice Lab 4 - Incident types

12.2 Scenario

Worldwide Industries (WWI) provides IT and networking services to their customers. Their services range from phone system and network installations to telephoning systems and security system installations. They are going to be leveraging Dynamics 365 for Field Service for installation and servicing of these systems for their customers. You are the system implementer that has been tasked with configuring the application to support the roll-out of the application. You will be adding and configuring some products that can be installed and setting up skills and characteristics that will be used as part of the implementation.

13 Exercise 1 – Create an Incident Type called Printer Installation

13.0.1 Task 1 –Service Task Types to be used with Incidents:

1. Using the **Sitemap**, select **Settings
2. Select **Service Task Types** under **Work Order** settings
3. Click the **+New** button and enter **[your prefix ex. mollyc]+ Clean Printer Assembly** for the Name.
4. Select **30 Minutes** for the **Estimated Duration.**
5. Click **Save and Close.**
6. Repeat Steps 2 – 4 to add each of the following:
    1. **[your prefix ex. mollyc]+ Replace Toner:** *Duration 15 Minutes*
    2. **[your prefix ex. mollyc]+ Finial Test:** *Duration 15 Minutes*

13.0.2 Task 2 - Create a Service Call Work Order Type

1. Using the **Sitemap**, select **Work Order Types**
2. Click the **+New** button and enter **[your prefix ex. mollyc]+ Service Call** for the Name.
3. Set **Incident Required** and **Taxable** to **No**
4. Click **Save & Close**

13.0.3 Task 3 –Create a Service Printer Incident Type

1. Using the **Sitemap**, select **Incident Types** under **Work Order** settings.
2. Click the **New** button and enter **[your prefix ex. mollyc]+ Service Printer** for the Name.
3. Select the Details tab, and configure as follows:

- **Copy Incident Items to Agreement:** *Yes*
- Click **Default Work Order Type** and select *[your prefix ex. mollyc]+ Service Call.*

1. Click **Save** to save the Incident type and leave it open.
2. Select the **Service Task** Tab, click the ellipsis and select **+New Incident Type Service Tasks** button. (If pop ups are blocked, you may need to unblock them)
3. Enter **[your prefix ex. mollyc]+ Clean Printer Assembly** for the **Name**, select **[your prefix ex. mollyc]+ Clean Printer Assembly** as the task type, ensure 30 minutes is set for **Estimated Duration**.
4. Click **Save and Close.**
5. Click the **+New Incident Type Service Tasks** button again.
6. Enter **[your prefix ex. mollyc]+ Replace Toner** for the **Name**, select **[your prefix ex. mollyc]+ Replace Toner** as the task type, ensure 15 minutes is set for **Estimated Duration**.
7. Click **Save and Close.**
8. Click the **Add Incident Type Service Tasks** button one last time.
9. Enter **[your prefix ex. mollyc]+ Finial Test** for the **Name**, select **[your prefix ex. mollyc]+ Finial Test** as the task type, ensure 15 minutes is set for **Estimated Duration**.
10. Click **Save and Close.**
11. Select the **Products** tab
12. Click the ellipsis and select **+ New Incident Type Product** button.
13. Configure the Incident Type Product as follows:
    - **Name:** *[your prefix ex. mollyc]+ Remote Printer*
    - **Unit:** *Primary Unit*
    - **Quantity:** *1*
    - **Product:** *[your prefix ex. mollyc]+ Remote Printer*
14. Click the **Save and Close** button
15. Select the **Services** Tab.
16. Click the ellipsis and select **+New Incident Type Service** button.
17. Configure the new Incident Type Service as follows:
    - **Name:** *[your prefix ex. mollyc]+ Printer Service Fee*
    - **Unit:** *Primary Unit*
    - **Service** *[your prefix ex. mollyc]+ Printer Service Fee*
18. Click the **Save and Close** Button
19. Select the **Characteristics** tab
20. Click the ellipsis and select **+New Incident Type Characteristics** button
21. Configure the Incident Type Characteristic as follows:
    - **Characteristic:** *[your prefix ex. mollyc]+ CISM*
    - **Rating Value:** *Familiar*
22. Click the **Save and Close** button

23. Click the **+New Incident Type Characteristics** button again
24. Configure the Incident Type Characteristic as follows:
    - **Characteristic:** *[your prefix ex. mollyc]+ Building Security*
    - **Rating Value:** *[your prefix ex. mollyc]+ Level 2 Security*
25. Click the Save and Close Button

14 Exercise 2 – Test your Configuration Settings

14.0.1 Task 1 –Create a new Work Order using Service Printer Incident Type:

1. Using the **Sitemap**, select **Service**.
2. Under **Work Orders**, under **Scheduling**.
3. Click the **+New** button.
4. Configure the New Work Order as follows:
    - **Service Account:** Click +New Account: enter [your prefix ex. mollyc]+ Account for the name
    - **Work Order Type** *[your prefix ex. mollyc]+ Service Call*
    - **Price List** *Default Price List*
    - **Taxable** *No*
    - **Primary Incident Type:** *[your prefix ex. mollyc]+ Service Printer*
5. Click the **Save and Close** button
6. Wait about 30 seconds to a minute and open the work order you just created.
7. Select the **Products** tab and verify that the **[your prefix ex. mollyc]+ Remote Printer Product** was added.
8. Select the **Services** tab and verify that the **[your prefix ex. mollyc]+ Printer Service Fee** was added.
9. Select the **[your prefix ex. mollyc]+ Service Tasks** tab and verify that the three tasks we added.
10. Click the **Related** tab and select **Characteristics**.
11. Verify that the two Characteristics defined on the Incident Type we added.

14.1 lab: title: 'Lab: Work order management' module: 'Module 5: Inventory and Work Order Management'

15 Module 5 - Inventory and Work Order Management

15.1 Practice Lab 5 - Work order management

15.2 Scenario

Worldwide Industries (WWI) provides IT and networking services to their customers. Their services range from phone system and network installations to telephoning systems and security system installations. They are going to be leveraging Dynamics 365 for Field Service for installation and servicing of these systems for their customers. You are the system implementer that has been tasked with configuring the application to support the roll-out of the application. You will be adding and configuring some products that can be installed and setting up skills and characteristics that will be used as part of the implementation.

16 Exercise 1 – Generating Work Orders

16.0.1 Task 1 - Create a new work order using and incident type

Out of the box, Dynamics 365 for Field Service has the work order entity enabled for use with the Resource Scheduling feature. In this task, we will be creating a new work order that we can schedule using the application.

1. In **Dynamics 365**, click the arrow next to the **Dynamics 365** text, and select **Field Service**.
2. Click the **Site Map** in the bottom left and select **Service**. Select **Work Orders** under **Scheduling**
3. Click the **New** button.
4. Configure the work order as follows:
   - **Service Account:** *[your prefix ex. mollyc]+ Account*. If not found, Click + New Account and enter: [your prefix ex. mollyc]+ Account
   - **Work Order Type:** *Inspection*
   - **Taxable:** *No*
   - **Primary Incident Type:** *Install IOT*
5. Click the Settings tab, and Configure as follows:
   - **Priority:** *Moderate* (if necessary, create a new priority with the title Moderate and save and close)
   - **Service Territory:** *WA*
   - **Time from Promised:** *Today @ 1:00 PM*
   - **Time to Promised:** *Today @ 3:00 PM*
6. **Save and Close** the work order

Note: The reason that we selected Install IOT for the incident type is because incident types are used in Field Service to assist in pre-population of data when a work order is created. The MRI Inspection incident type was created previously and has several service tasks, products, services, and characteristics associated with it.

When a work order is created that uses the Install IOT incident type, this information is auto populated to the work order. A Dynamics 365 workflow populates this information for us when the record is saved. It can take several minutes for this to populate.

16.0.2 Task 2 - Schedule the work order using the schedule board

Field Service provides several items that can be used to assist in scheduling resources for specific items. The two primary components that are used are the Schedule Board and the Schedule Assistant. The Schedule Board provides the ability to manually schedule items, and the assistant offers suggestions on resources based on factors like location, skills, and availability. In this task we will examine how you can use the schedule board to schedule items and a high level.

1. Select **Schedule Board** under **Scheduling**.
2. The Schedule Board provides several options that can be used to schedule items, such as a filter, and a map view.
3. Expand the **Booking Requirements** pane at the bottom of the board.
4. Select **Unscheduled work orders**.
5. Locate the **work order** for Adventure Works (Sample) that you created in a previous task. Drag it to your user's row on the schedule board.

16.1 Notice that it the text will appear red until you find a time that falls within the time window promised.

16.2 lab: title: 'Lab: Agreements' module: 'Module 6: Field Service Agreements'

17 Module 6 - Field Service Agreements

17.1 Practice Lab 6 - Agreements

17.2 Scenario

Worldwide Industries (WWI) provides IT and networking services to their customers. Their services range from phone system and network installations to telephoning systems and security system installations. They are going to be leveraging Dynamics 365 for Field Service for installation and servicing of these systems for their customers. You are the system implementer that has been tasked with configuring the application to support the roll-out of the application. You will be adding and configuring some products that can be installed and setting up skills and characteristics that will be used as part of the implementation.

18 Exercise 1 - Create Field Service related products, and add to Price List

Before you can define products associated with Agreements, they need to be added to the product catalog. In this exercise, you will be defining three new products:

- A Remote Printer
- Monthly Printer Maintenance
- Printer Service Fee

18.1 Task 1 - Add a Printer Products

Note: If you have already completed this step in a previous lab, skip to Exercise 3.

1. Using the **Sitemap**, select **Products** under **Settings.**
2. Click the **Add Product** to create a Product
3. Define the Details of the Product as noted below:
    - **Name:** [your prefix ex. mollyc]+ Remote Printer
    - **Product ID:** *[your prefix ex. mollyc]+ Print-Serv-1234*
    - **Unit Group:** *Default Unit*
    - **Default Unit:** *Primary Unit*
    - **Decimals Supported:** *2*
4. Select the **Field Service** tab, set the Field Service Product Type to **Inventory**
    - Set the **Taxable** field to **No**
    - Save the product, and click **Publish**
5. Return to the Products page. Click the **Add Product** to create a Product
6. Define the Details of the Product as noted below:
    - **Name:** [your prefix ex. mollyc]+ Monthly Printer Maintenance
    - **Product ID:** *[your prefix ex. mollyc]+ Print-Maint4*
    - **Unit Group:** *Default Unit*
    - **Default Unit:** *Primary Unit*
    - **Decimals Supported:** *2*
7. Select the **Field Service** tab, set the Field Service Product Type to **Non-Inventory**

8. Set the **Taxable** field to **No**
9. Save the product, and click **Publish**
10. Click the **Add Product** to create a Product
11. Define the Details of the Product as noted below:
    - **Name:** [your prefix ex. mollyc]+ Printer Service Fee
    - **Product ID:** *[your prefix ex. mollyc]+ Print-Service-Fee*
    - **Unit Group:** *Default Unit*
    - **Default Unit:** *Primary Unit*
    - **Decimals Supported:** *2*
12. Select the **Field Service** tab, set the Field Service Product Type to **Service**
13. Set the **Taxable** field to **No**
14. Save the product, and click **Publish**

18.2 Task 2 - Add a Printer Products to a Price List

1. Using the **Sitemap**, select **Price Lists** under **Settings.**
2. Open an exisitng price list.
3. In the **Price List Items**, click the **+ Add** button to add a Price List Line Item
4. Enter the following information:
    - **Product:** [your prefix ex. mollyc]+ Remote Printer
    - **Unit:** Primary Unit
    - **Pricing Method:** Currency Amount
    - **Amount:** $1000.00
5. In the **Price List Items**, click the **+ Add** button to add a Price List Line Item
6. Enter the following information:
    - **Product:** [your prefix ex. mollyc]+ Monthly Printer Maintenance
    - **Unit:** Primary Unit
    - **Pricing Method:** Currency Amount
    - **Amount:** $750.00
7. Click **Save and Close**
8. In the **Price List Items**, click the **+ Add** button to add a Price List Line Item
9. Enter the following information:
    - **Product:** [your prefix ex. mollyc]+ Printer Service Fee
    - **Unit:** Primary Unit
    - **Pricing Method:** Currency amount
    - **Amount:** $150.00
10. Click **Save and Close**
11. Close the price list

19 Exercise 2 - Create an Agreement

In this exercise you will be defining a preventative maintenance agreement that will generate Work orders monthly and quarterly. Additionally, the customer will be billed at the end of each month with a Monthly Printer Maintenance fee.

19.1 Task 1 - Create an Agreement to be used for Preventative Maintenance

1. In Dynamics 365, navigate to **Field Service**
2. Using the Sitemap, select **Agreements** under the **Service Delivery** heading.
3. Click **New** from the Command Bar.
4. Select **[your prefix ex. mollyc]+ Account** for the **Service Account**. If you do not see your Account, create a new Account with name *[your prefix ex. mollyc]+ Account*
5. Under Details set the fields as follows:
   - **Start Date:** Today's Date
   - **End Date:** 1 Year from Today
6. Set the **Price List** to **Default Price List** and **Taxable** to **No**.
7. Click the **Save** to save the agreement and leave it open.

19.2 Task 2 - Setup an Automated Booking for the Agreement

1. In the agreement that you just created, click on the **New Agreement Booking Setup** button in the Booking Setups area.
2. Configure the Agreement Booking as follows:
   - **Name:** [your prefix ex. mollyc]+ Monthly Printer Service
   - **Auto Generate Work Order**: Yes
   - **Work Order Type:** Preventative Maintenance
   - **Auto Generate Booking**: No
   - **Estimated Duration:** 1 Hour
   - **Pre Booking Flexibility:** 1
   - **Post Booking Flexibility:** 1
   - **Time Window Start:** 9:00 AM
   - **Time Window End:** 12:00 PM
   - **Generate Work Order Days in Advance**: 2 (to ensure that the work order is created right away, determine how many days are left in the current month, and use that number or greater for this value)
3. Save the record and leave it open.
4. Under **Incidents,** click **New Agreement Booking Incident.**
5. Select **Install IOT** for Incident Type and click **Save & Close.**
6. On the Agreement Booking Setup Record, click the ellipsis and select **Booking Recurrence**.
7. Set the Recurrence Patten as noted below:
   - **Monthly:** on the 1st day of every One Month
   - Start on the 1st day of Next Month
   - End After 12 Occurrences
8. Verify the changes have saved, and close the Booking Setup Record.
9. In the agreement that you just created, click on the **New Agreement Booking Setup** button in the Booking Setups area.
10. Configure the Agreement Booking as follows:
    - **Name:** [your prefix ex. mollyc]+ Quarterly System Check
    - **Auto Generate Work Order**: Yes
    - **Work Order Type:** Preventative Maintenance

- **Generate Work Order Days In Advance:** 5
- **Priority:** Moderate
- **Auto Generate Booking**: No
- **Estimated Duration:** 30 Minutes
- **Pre Booking Flexibility:** 2
- **Post Booking Flexibility:** 4

11. Save the record and leave it open.
12. On the Agreement Booking Setup Record, click ellipsis and select **Booking Recurrence**.
13. Set the Recurrence Patten as noted below:
    - **Monthly:** on the 1st day of Every 3 Month
    - Start on the 1st day of Next Month
- End After 12 Occurrences
14. Verify the changes have saved and close the Booking Setup Record.
15. Locate **the Invoice Setups** Sub-grid, and click the **New Agreement Invoice Setup** button to create a new Invoice setup
16. Enter *[your prefix ex. mollyc]+ Monthly Invoice* for the Name, and Click Save
17. If Necessary, expand Invoice Products, click the ellipsis and select **New Agreement Invoice Product** button to add Invoice Products
18. Complete the Agreement Invoice Product as follows:
    - **Product:** [your prefix ex. mollyc]+ Monthly Printer Maintenance
    - **Unit:** Primary Unit
    - **Quantity:** 1
    - Click **Save and Close**
19. Close the [your prefix ex. mollyc]+ Monthly Invoice record
20. Return to the Agreement. Change the Agreement System Status from Estimate to **Active** and **Save**.

19.3 lab: title: 'Lab: Managing schedules' module: 'Module 10: Managing Scheduling Options'

20 Module 10 - Managing Scheduling Options

20.1 Practice Lab 9 - Managing schedules

20.2 Scenario

Worldwide Industries (WWI) provides IT and networking services to their customers. Their services range from phone system and network installations to telephoning systems and security system installations. They are going to be leveraging Dynamics 365 for Field Service for installation and servicing of these systems for their customers. You are the system implementer that has been tasked with configuring the application to support the roll-out of the application. You will be adding and configuring some products that can be installed and setting up skills and characteristics that will be used as part of the implementation.

21 Exercise 1 – Configure supporting resources, roles, and skills

21.0.1 Task 1 – Create three resource categories

Before we start making the resource facilities, pools, and requirement groups that will be used to support the scheduling scenario, we what to ensure that we have the necessary supporting components defined that will be

used to schedule.

To make it as easy as possible we are going to add three resource categories that can be easily used to identify consultation rooms, patient consultants, and Doctors.

1. With the **Field Service** application open, click the Sitemap in the bottom left corner and select **Resources.**
2. Open **Categories** in the left menu.
3. Click the **New** button to create a new Resource Category.
4. Enter **Consultation Room** into the Name field and select **Save and Close.**
5. Click the **New** button to create another new Resource Category.
6. Enter **[your prefix ex. mollyc]+ Patient Consultant** into the name field and select **Save and Close.**
7. Click the **New** button to create the last new Resource Category.
8. Enter **[your prefix ex. mollyc]+ Doctor** into the name field and select **Save and Close**.

21.0.2 Task 2 – Create a Consultation Characteristic

Some doctors may be able to do consultations, and some may not. To ensure that we can identify the doctors that are able to perform consultations, we are going to add a new resource characteristic called Consultation. This characteristic will be added to any resource that could be used in a consultation.

1. While you are in **Resources** section, click **Characteristics** in the left menu. (make sure the view is set to **Resource Characteristics**
2. Click the **New** button to define a **Characteristic**. Ensure the form is set to **Information**
3. Enter **[your prefix ex. mollyc]+ Consultation** into the Name field. (If prompted to create a new Characteristic, press new and create the Characteristic before assigning it as a Bookable Resource Characteristic. Set the type to **Skill**)
4. Enter your user record as the Resource.
5. **Save and close.**

21.0.3 Task 3 – Configure Resource Working Hours

One factor that goes a long way in ensuring that all resources that will be working together on projects or as part of a pool have the same working hours. Work hours can be defined for up to 25 resources at one time by creating a work hours template. A work hours template must be based on another resource's working hours.

We will start by defining the working hours for a single resource. We will use that resource to create the Work Hours Template.

1. While you are in **Resources**, click **Resources** in the left menu.
2. Locate and select the resource record for your user.
3. On the **command bar** at the top, click the **Show Work Hours** button. *(Note: you may need to allow pop-up windows if you are running a popup blocker.)*
4. Select the **+New** drop-down and select **Working hours**.
5. Change *repeat* to **Every Week**.
6. When the weekly schedule is displayed, make sure **Mo thru Fr** are checked.
7. Verify the Work Hours are set to **8:00 AM** to **5:00 PM** and click **Save**
8. Verify that the new schedule is being applied moving forward and **Close** the **Work Hours window.**
9. In the left menu, click on **Workhour Templates.**
10. Click the **New** button to define a new template.
11. Define the template as follows:
    - **Name:** *[your prefix ex. mollyc]+ Standard Hours*

- **Template Resource:** *your user*

12. Click **Save and Close.**

22 Exercise 2 - Create a new work order using an incident type

Out-of-the-box, Dynamics 365 for Field Service has the work order table enabled for use with the Resource Scheduling feature. In this task, we will be creating a new work order that we can schedule using the application.

22.0.1 Task 1 – Create a New Work Order from an Incident Type

1. In **Dynamics 365**, click the arrow next to the **Dynamics 365** text, and select **Field Service**.
2. From the sitemap in the bottom left corner, select **Service**. In the left column, select **Work Orders**.
3. Click the **New** button.
4. Configure the work order as follows:
   - **Service Account:** *[your prefix ex. mollyc]+ Account* (should have been created earlier. If not, create a new Service Account with name *[your prefix ex. mollyc]+ Account*)
   - **Work Order Type:** *Inspection*
   - **Taxable:** *No*
5. Click the Settings tab, and Configure as follows:
   - **Priority:** *Moderate*
   - **Service Territory:** *WA*
   - **Time from Promised:** *Today @ 1:00 PM*
   - **Time to Promised:** *Today @ 3:00 PM*
6. **Save and Close** the work order

23 Exercise 3 - Schedule the work order using the schedule board

Universal Resource Scheduling provides several items that can be used to assist in scheduling resources for specific items. The two primary components that are used are the Schedule Board and the Schedule Assistant. The Schedule Board provides the ability to manually schedule items, and the assistant offers suggestions on resources based on factors like location, skills, and availability. In this task we will examine how you can use the schedule board to schedule items and a high level.

23.0.1 Task 1 – Schedule the Work Order you just created

1. In the left column, open the **Schedule Board**.
2. The Schedule Board provides several options that can be used to schedule items, such as a filter, and a map view.
3. Expand the **Booking Requirements** pane.
4. Select **Unscheduled work orders**.
5. Locate the **work order** for [your prefix ex. mollyc]+ Account. Drag it to your user on the schedule board.
6. Release the mouse button and the item will be placed on the schedule board.
7. Locate and select the work order for **[your prefix ex. mollyc]+ Coho Winery** under **Unscheduled work orders.** Click **Find Availability**.
8. Dynamics 365 will analyze the requirements needed for this item and will factor in other items such as any skills required, work order & resource locations, and resource availability to create a list of suggested resources that would be able to work on this item.
9. As you hover over the available time block for **your user**, a **Book** icon will appear. Click the **Book** icon to schedule Van for this work order.

10. Click the **Exit Search** Icon to return to the Schedule Board.