

# Activate – Dynamics 365 Customer Engagement: Introduction to Field Service

## Proof of Concept

**Duration:** 1 Day [Remote / Onsite]

**Difficulty Level:** 100

## Description

This is a one-day instructor-led service that focuses on understanding the capabilities of Dynamics 365 Field Service and enabling the capabilities in the customer's environment.

## Objectives

After completing this training, students will be able to:

- Understand the core features of Field Service and Field Service Mobile apps
- Learn to administer Field Service
- Gain an understanding of Field Service architecture
- Learn to define Customer Assets, Incident Types, Service Tasks, and more
- Understand how different personas interact with Field Service
- Learn the different scheduling methods and the five stages of scheduling adoption
- Learn about next steps, including enhancements and transferring the Field Service metadata between environments

## Outcomes

- Set up Field Service in your environment
- Enable a standard Field Service use case in your environment from customer request to work order posted and invoice generated

## Methodology

### Learn by example

Work closely with a Microsoft Cloud Solution Architect to learn key capabilities of Dynamics 365 Field Service

## Scope

This offering is scoped to Dynamics 365 Field apps:

- Field Service
- Field Service Mobile
- Resource Scheduling

## Agenda

### Morning:

- Overview of Field Service
- Explore Dynamics 365 Field Service
- Describe the scheduling process
- Working with Dynamics 365 Field Service tables

### Afternoon:

- Additional features and functionality
- Reports, Charts and Dashboards
- Activate Dynamics 365 Field Service in your environment

# Delivery Outline

Requirements	
<p><b>Participants</b></p> <ul style="list-style-type: none"><li>▪ Dynamics 365 Field Service App users, IT staff, developers, and system administrators</li></ul> <p><b>Skill Requirements</b></p> <ul style="list-style-type: none"><li>▪ Understanding of field service concepts</li></ul> <p><b>Time Commitment</b></p> <ul style="list-style-type: none"><li>▪ One full-day engagement with relevant roles</li></ul>	<p><b>Delivery Requirements</b></p> <ul style="list-style-type: none"><li>▪ Computer with Windows 10 or later, audio equipment, internet access. Modern browser and at least 1 Mbps bandwidth per participant</li><li>▪ Internet access with at least 1 Mbps bandwidth per attendee</li><li>▪ Microsoft Teams for remote deliveries</li></ul>

Pre-Delivery	
<p><b>Pre-Delivery Scoping</b></p>	<p>Scoping:</p> <ul style="list-style-type: none"><li>• Identify the environment which will be used to implement the PoC</li><li>• Understand the required permissions to enable features</li><li>• Agree on the modules to be installed and features turned on</li></ul>

**For more information:** Please contact your Microsoft Representative for more details.