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Exam : MB-240

Title : Microsoft Dynamics 365 for Field Service

Version : DEMO

1. Topic 1, Contoso Case study

General Overview
Contoso is a large international manufacturing company that has offices around the world with service and scheduling departments in each office. In addition. Contoso has sates reps throughout the world. Contoso has main offices in North America. Europe and Asia, with global headquarters based in Redmond, Washington, USA. Each of the regional offices has their own sales and service teams. The regional HQ locations also include sales and services leaders and executive management. Global HQ houses company executives for various departments, including sales and service.
Office hours are from 8:00 am to 6:00 pm. every day of the week except holidays, which have no work hours. This applies to all offices, using their local time zone. Third-party contractors handle work outside of normal work hours at a higher rate Field Service staff Contoso's service technicians around the world will be a combination of internal employees and third-party contractors.
• Pay type is Straight for regular work hours, and Overtime for work on holidays and after hours.
• All technicians have the capacity of handling just one job at a time, while supervisors can handle 2 jobs at a time.

Contoso's internal field service employees:
• Begin and end their workday at their home of record.
• Have a default office location / regional office.
• Are assigned to multiple territories.

All third-party contractors:
• Begin and end their workdays at their office location.
• Have a default office location / regional office.
• Are assigned to only one territory.

Dispatchers:
• Work at the Main office for their region
• Assigned to all territories in the region.
• Have privileges to customize their Schedule Boards.

All field service technicians will utilize the Field Service mobile app.
• Contoso employees will have full field service licenses, while third-party contractors will not.
• Field Service technicians will not have access to Leads. Opportunities or other sales-specific data.
• Dispatchers can see all data for their region, though they will mostly be scheduling for only one territory.
Contoso has several classes to distinguish the capability and training level of its field technicians. All work order bookings need to respect these classes and book resources accordingly.
Org structure setup
Contoso currently uses Dynamics 365 Customer Engagement for leads, opportunities, quotes and orders. There are currently 200 sales users in North America. 500 in Europe and 400 in the Asia-Pacific region.
The Contoso physical environment is structured in the following manner, with the roles noted.

Location	Location Details	Roles
Redmond, WA	• Global HQ • North America HQ	• Executive Management • Sales Executives
Chicago, IL	North America Midwest Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
Los Angeles, CA	North America West Coast Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
New York, NY	North America East Coast Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
Montreal, QC	North America Canada Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
City of Manila, Philippines	• APAC HQ • Philippines Regional Office	• Sales Reps • Sales Managers • Sales Director • Regional Sales Manager • Executive Management
Kolkata, India	• APAC India Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager

Field Service structure

Contosos field service technicians respond to all installation work orders with two human resources:

• One licensed technician (Level 3). and...

• One apprentice technician. Apprentices can be either Level 1 (new trainee) or Level 2 (halfway through training).

In many cases installation work also requires the use of specialty tools, depending on what is being installed. The current system does not have any way to track the level of skill for each resource, nor the

uses for the specialty tools. This is handled as "tribal knowledge."
Preventative maintenance work orders can be handled by one resource if they are a Level 2. If the resource is a Level 1. they must be accompanied by a Level 3 resource, and vice versa.
All field service technicians are required to complete OSHA training annually. In their first year of apprenticeship they must complete the full 40-hour course. In the next 2 years they must complete the 8-hour refresher course. This cycle repeats every 3 years for the duration of their employment. In the current system, when a technician has finished with a work order, they turn in the paper copy with their notes to the dispatcher. The dispatcher then gives that information to a back-office employee, who will check the work order to ensure accuracy before creating an invoice. Contoso wishes to automate this exact process in the new system.

Customer base
About half of Contoso's customer base includes Not For Profit service organizations. The implications for billing are complex, so it's important that Tax Exempt Status be noted for all Accounts and flow through to all Work Orders. NFP Customers who are associated with government entities will pay for travel time; other customers will not. This information should flow from the Billing Account to all associated Service Accounts.
Most Contoso customers sign agreements for Preventative Maintenance. Contoso uses templates and incidents to ensure services standards are the same across all regions. Preventative Maintenance agreements include monthly inspection and quarterly cleaning and inspection, with billing occurring quarterly.

Remaining consistent
Contoso plans to keep the current data structure and extend it to the new Field Service functionality. Field Service users will fall under the same organizational structure currently implemented for the sales staff.
• Field service technicians will only be able to see their assigned work orders and bookings.
• Dispatchers will be able to see all work orders and bookings for the region-

Planned changes
Contoso plans to implement Dynamics 365 Field Service with mobile access. They will be using incidents, work orders, bookings and invoicing.
The following requirements were gathered during analysis:
1. Work Orders and Scheduling.
o Automated and suggestion-based scheduling.
o Scheduling based on required technician skills and number of technicians needed.
o Schedule resources based on location, minimizing travel time when possible.
o Technicians must be onsite within 3 hours of an emergency Work Order being assigned to them.
o The travel time should automatically update upon changing a booking.
2. Agreements
o Setup and create work orders, bookings and invoices for preventative maintenance with work orders automatically created 14 days before PM is due. o EscaJation of Work Orders based upon agreed customer commitment. o Ability to designate clients as Preferred, with special pricing.
3. Products and Services

o Warehousing and inventory management processes will be implemented, including tracking products moved onto trucks for installation at customer sites.
o Implement a parts return process that includes having a technician uninstall the part to be returned.
o Multiple price lists will be used, divided into Gold, Silver and Bronze levels, based on the spending level of each customer.
o Internal teams need the capability to associate a 3D image to a Customer Asset record. o Products added to a work order should be set to Allocated.
4. Resources
o Implement Company Holidays for North American regions, o Implement Paid Time Off for all regions.
o Specialty equipment will be scheduled on work orders as needed. o Training and skill levels will be noted as appropriate for resources. 5. System
o Geocoding will be activated throughout the system.
o Territories will be used for Accounts, Resources and Work Orders. Technical requirements
Contoso identified the following technical requirements:
1. Invoking
o Auto creation of invoices upon work completion.
o The system must track the price of resources based on holidays and after-hours scenarios at a rate of one and a half times the no*mal billing rate.
o Travel time is billable for all field service technicians, pay type Travel, which should be noted on all Service Accounts.
2. Resources
o Contractor technicians require access to work order and customer details once assigned to a booking.
o Dispatchers need a schedule board for their region(s).
3. Products and Services
o All parts that are removed from a customer's equipment must be returned to the Main warehouse. o Products to be marked as Assets will be configured accordingly.
o All products that will become Assets require instalation by a technician. o All products are received into the Main warehouse.
4. Work Orders
o The ability to have templates for work orders; The templates will provide guidance for technicians along with recommended products and default services.
o Once a work order is posted it should no longer show on views.
o Contoso will use the "out of the box" work order statuses to begin, though they may be changed in later phases of the project.
5. Scheduling
o Once a work order is scheduled, do not change the time.
o Work Orders scheduled to technician(s) who do not have the desired skill set and level should show a warning.
6. Security and access
o Safeguards must be in place for the data on the Field Service Mobile App if a technician loses his mobile phone or tablet device, o The Field Service Administrator needs the ability to update the defaults for the schedule assistant.
7. Accounts
o Any Service Accounts that do not have a Billing Account noted should show a warning, o Any Billing

Accounts that do not have a Price List noted should show a warning.

Contoso has asked that you create several work order types to meet their Requirements and Planned Changes.
Of the many work order types requested, which three should you create? Each correct answer presents a complete solution. NOTE: Each correct selection is worth one point.
A. Installation
B. Agreement
C. Returns
D. Inspection
E. Preventative Maintenance
Answer: A, D, E

2.DRAG DROP
When Contoso installs chillers for customers, they are expected to follow the same procedure for each install.
You need to configure the functionality necessary to automatically add all the tasks and resources needed to a work order when the work order type is Chiller Installation. You must follow the established Contoso guidelines for installation requirements, as outlined in the Case Study, and create the most efficient process possible.
Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Actions	Order
Create a priority record.	1
Create a work order sub-status called Chiller Installation.	2
Configure an incident type.	3
Associate the incident type to the requirement group template.	4
Configure a requirement group template.	
Add the incident type to all Chiller Installation work orders.	

Answer:

Actions	Order	
Create a priority record.	1	Configure an incident type.
Create a work order sub-status called Chiller Installation.	2	Associate the incident type to the requirement group template.
Configure an incident type.	3	Configure a requirement group template.
Associate the incident type to the requirement group template.	4	Add the incident type to all Chiller Installation work orders.
Configure a requirement group template.		
Add the incident type to all Chiller Installation work orders.		

3.DRAG DROP
A dispatcher in Indianapolis. Indiana receives an emergency service call on July 4 and assigns the

booking to a third-party contractor, attaching the emergency SLA. The contractor receives notification of the work order and travels from his home to the job site, arriving 3.5 hours after the work was assigned. The contractor works for 2 hours, installing 2 new identical chillers, which need to be added to the customer's annual maintenance agreement. The contractor fills in product usage and notes, gets the client's signature, and then changes the booking status to Completed

A back office employee needs to look at the work order to ensure accuracy, then change the status to Posted.

When performing a quality check, what will the back office employee expect to see as a result of this service call? To answer, drag the appropriate record type to the correct statement. Each record type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content. NOTE: Each correct match is worth one point.

Answer:

4.DRAG DROP

You need to create a Preventative Maintenance Agreement that meets Contoso standards and requirements.

Which five actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Actions	Order
Create an agreement with no incident.	1
Add one agreement schedule for both monthly and quarterly visits.	2
Create an agreement with the PM incident selected.	3
Add two agreement schedules, one monthly and one quarterly.	4
Set agreement to **Active**.	5
Set **Auto Generate Work Order** to **Yes**.	
Set **Invoice Recurrence** to **Monthly**, recur every 3 months.	

Answer:

Actions	Order	
Create an agreement with no incident.	1	Create an agreement with the PM incident selected.
Add one agreement schedule for both monthly and quarterly visits.	2	Add two agreement schedules, one monthly and one quarterly.
Create an agreement with the PM incident selected.	3	Set agreement to **Active**.
Add two agreement schedules, one monthly and one quarterly.	4	Set **Auto Generate Work Order** to **Yes**.
Set agreement to **Active**.	5	Set **Invoice Recurrence** to **Monthly**, recur every 3 months.
Set **Auto Generate Work Order** to **Yes**.		
Set **Invoice Recurrence** to **Monthly**, recur every 3 months.		

5.Dispatchers at Contoso have access to a wide range of information because they often cover for each other within the region. However, for their normal dairy operations, they only need to be able to see resources in their territory.

The dispatcher needs to customize their schedule board to filter resources to their territory.

What should the dispatcher do?

A. On the Filter & Map View window, select a Service Territory, then select Save Current Filters as Default.

B. On the Filter & Map View window, select a Resource Type, then select Save Current Filters as Default.

C. In the Scheduler Settings, select one Territory.

D. Add a Booking Requirements tab.

Answer: A