



Complete Guide to Field Service

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FIELD SERVICE LIGHTNING

Want to manage your field service in one place? Field Service Lightning is a powerful set of features that lets you set up and customize a field service hub in Salesforce.

Field Service Lightning includes the following features, which you can pick and choose from to fit your business needs.

- The Field Service Lightning **standard features** are available when Field Service Lightning is enabled in your org. The standard features offer:
 - **Work order management:** *Work orders* represent tasks to be performed for your customers. You can attach Knowledge articles to work orders, split them into sub-tasks called *work order line items*, and track terms in service-level agreements using milestones. *Service appointments* can be associated with work orders and work order line items, and include details about the appointment schedule. And, time-saving templates called *work types* help you standardize your work orders.
 - **Resource management:** *Service resources* are users who can perform field service work. You can assign service resources to service appointments and specify each resource's skills, service territory, and hours of operation. *Service territories* represent regions in which field service work can be performed. You can assign service resources to a territory and create territory hierarchies.
 - **Schedule management:** *Operating hours* let you define when your service resources are available to work, and when work can be performed in service territories. You can also track service resource absences.
- The Field Service Lightning **managed package** builds on the standard features and include:
 - A scheduling optimizer that allocates resources to appointments in the most efficient way possible by accounting for technician skill level, travel time, location, and other factors
 - A dynamic scheduling console that gives dispatchers and supervisors a bird's-eye view of all scheduled service appointments
 - A robust toolbox of work rules and scheduling policies that help you define your ideal scheduling model
 - Out-of-the-box triggers that make it easy to customize your scheduling and display preferences

Field Service Lightning gives you the tools to plan, perform, and track all your field service work, from installations to repairs and maintenance. Let's get started!

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features and managed package are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud. Work orders are also available in **Professional** Edition.

PLANNING FOR FIELD SERVICE LIGHTNING

Field Service Lightning is a powerful set of features which you can customize to meet your own unique field service needs. Before setting up Field Service Lightning, consider these essential planning questions.

What types of field service tasks do you want to track?

If many of your business's appointments involve similar tasks, it's a good idea to create work order templates, known as *work types*. On each work type, you can specify how long each type of appointment takes and which skills are required to complete it. Then, you can quickly create work orders or work order line items that inherit their settings from the work type. Work types save you time and helps you standardize your field service work.

How do you want to track technicians' skills?

You can assign skills to all service resources in your org to indicate their certifications and areas of expertise. You can also specify each resource's skill level from 0 to 99.99. For example, you can assign Maria the "Welding" skill, level 50. In addition, you can add required skills to work types, work orders, and work order line items to let dispatchers know which skills are required to complete the job.

If you intend to use the skills feature, decide which skills you want to track and how skill level is to be determined. For example, you may want the skill level to reflect years of experience, certification levels, or license classes.

How do you want to model territories?

You can create *service territories* in your org to represent the geographical regions in which your team works. Territories have their own operating hours and child territories, and service resources can be assigned to territories as members. Depending on how your business works, you can create territories based on cities, counties, or other factors.

Service Territories represent where your Service Resources work and operating hours represent when they work. Service Territories typically represent geographical areas since resources are based near the locations they service. However, depending on how your business works, you may decide to create territories based on other factors, such as your business units or departments like field sales vs field service. Further, Service Territories can be organized into hierarchies, to reflect parent and child relationships.

Operating Hours indicate when appointments can take place in the territory. Service Resources assigned to the territory inherit the territory's operating hours by default. Put simply, this means resources operate the same hours as their Service Territory. If desired, you can define different hours for the territories' resources.

How do you manage your team's calendars?

A service resource has *operating hours* for each service territory they belong to which indicate when they're available to work in that territory. Similarly, a service territory's operating hours indicate when appointments can take place in the territory. If a resource's operating hours aren't defined for a territory, they inherit their service territory's operating hours. Resource absences are tracked in the Absences related list on their detail page.

While you can assess a service resource's schedule by reviewing their scheduled service appointments, absences, and operating hours, a calendar view isn't available for individual service resources, unless you're using the Field Service Lightning managed package.

Do you want a customizable dispatcher console and automatic scheduling optimization?

If so, consider using the Field Service Lightning managed package.



Note: Sharing must be enabled to install the managed package guide.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Do you want to give your customers a way to track their service progress?

If so, you can add standard Field Service Lightning objects like work orders to your communities built using the Salesforce Tabs + Visualforce template. Only work orders, work order line items, and service appointments are available in communities built on the Customer Service (Napili) template. Make sure to double-check which fields are visible in your communities so customers only see the information you want them to see.

SET UP FIELD SERVICE LIGHTNING

Set up Field Service Lightning in a way that fits your business needs.

 **Important:** Before you get started, get informed! We recommend reading:

- [Planning for Field Service Lightning](#)
- [Field Service Lightning Considerations](#)

1. [Enable Field Service Lightning](#)

Enable Field Service Lightning to start using field service features like work orders, service appointments, and more.

2. [Assign Field Service Lightning Permission Sets](#)

To give your team access to Field Service Lightning features, assign the necessary object permissions to users with the help of permission set licenses.

3. [Set Up the Field Service Lightning Managed Package](#)

The Field Service Lightning managed package builds on Salesforce's standard field service features to deliver a rich, highly customizable experience for dispatchers and technicians.

4. [Set Up Service Territories](#)

A service territory represents a region in which field service can be performed. Learn how to configure service territory settings and create territories that fit your business processes.

5. [Create Operating Hours](#)

Define operating hours and assign them to service territories, service territory members, or accounts to indicate their field service hours.

6. [Set Up Service Resources](#)

A service resource represents a Salesforce user who can perform field service work. Learn how to create service resources and track their skills and availability.

7. [Set Up Skills for Field Service](#)

Assign skills to service resources to indicate the type of work that they can perform. You can also add required skills to work orders and work types so only resources with certain skills can be assigned to complete the work.

8. [Set Up Work Orders](#)

A work order represents work to be performed on your customers' products. Learn how to configure work order settings and create time-saving templates called work types.

9. [Set Up Locations for Field Service](#)

For Field Service, your locations can be vans, warehouses, customer sites, or whatever suits your organization. Learn how to create service locations and track their consumption and availability.

10. [Set Up Parts and Van Stock](#)

Parts and van stock represent a list of items necessary to complete work orders. Learn how to create parts and van stock and track their consumption and availability.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features and managed package are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud. Work orders are also available in **Professional** Edition.

11. [Set Up Customer Service Reports](#)

Make your customers happy with fast field service reports delivered to their inboxes. Your technicians and dispatchers can create reports for work orders, work order line items, and service appointments and email them directly to the customer. You can use standard templates or create variations of your own.

12. [Create Field Service Lightning Reports](#)

Create report types to track field service progress in your org.

Enable Field Service Lightning

Enable Field Service Lightning to start using field service features like work orders, service appointments, and more.

1. From Setup, enter *Field Service Settings* in the Quick Find box, then select **Field Service Settings**.
2. Click **Enable Field Service Lightning**.
3. If you want, select the option to turn on in-app notifications for Salesforce1 and Lightning Experience users when any of the following actions occurs on a work order or work order line item that they own or follow:
 - A text or file post is added
 - A tracked field is updated
 - The record owner changes
 - The resource assignments change on a related service appointment

 **Note:** If the option to track all related objects is selected in your feed tracking settings for work orders, users are also notified when child records of work orders—such as service appointments—are created or deleted.
4. When you set up work types, which are templates for work orders, you can opt to automatically add a service appointment to new work orders or work order line items associated with a work type. Optionally, configure the Due Date on auto-created service appointments by indicating how many days past the created date it should fall.

Enabling Field Service Lightning makes the following tabs available in Salesforce:

- **Work Orders:** A basic Field Service Lightning feature, available whether or not Field Service Lightning is enabled.
- **Service Appointments:** Appointments to perform field service work for customers. You can specify the number of resources needed to complete an appointment, the skills required, and the appointment schedule.
- **Service Resources:** Users who can perform field service work. You can assign resources to service appointments and specify each resource's skills, service territory, and more.
- **Skills:** Capabilities needed to perform tasks.
- **Work Types:** Templates that help you standardize your work orders.
- **Service Territories:** Regions in which field service can be performed. You can assign resources to a territory and create territory hierarchies.
- **Operating Hours:** Field service hours that you can define for service territories, service resources, and accounts.
- **Products:** A Salesforce feature, available whether or not Field Service Lightning is enabled.
- **Locations:** A Salesforce feature, available whether or not Field Service Lightning is enabled.
- **Product Items:** A basic Field Service Lightning feature, is available whether or not Field Service Lightning is enabled.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features and managed package are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To enable Field Service Lightning:

- "Customize Application"

Enabling Field Service Lightning also turns on geocoding (location data) for supported features. To learn more, see [Location Tracking in Field Service Lightning](#) on page 34.

 **Note:**

- The Field Service Lightning managed package includes scheduling optimization, an interactive dispatcher console, and more.

Assign Field Service Lightning Permission Sets

To give your team access to Field Service Lightning features, assign the necessary object permissions to users with the help of permission set licenses.

Field Service users must have a Service Cloud license, a Field Service license and a Field Service permission set license.

 **Important:** Before you can create a permission set for your Field Service users, verify that your org has Field Service Lightning enabled. From Setup, enter *Field Service* in the Quick Find box, then select **Field Service Settings**. Verify that Field Service Lightning is enabled.

Create a permission set for each needed [Field Service Lightning license](#). Creating a permission set gives the object permissions to users with the license.

- Administrators in the Field Service Standard license.
 - Dispatchers need the Field Service Dispatcher permission set licenses.
 - Technicians need the Field Service Scheduling and Field Service Mobile permission set licenses.
1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets** under *Manage Users*.
 2. Click **New**.
 3. Enter a label, API name, and description for your permission set.
To keep it simple, we suggest using the same name as the [permission set license](#) you plan to associate it with.
 4. Under *Select the type of users who will use this permission set*, select the corresponding Field Service Lightning permission set license.
 5. Click **Save**.
 6. On the permission set overview page, under *System*, click **System Permissions**.
 7. Click **Edit**.
 8. Enable the corresponding Field Service Lightning permission set license.
 9. Click **Save**.
 10. On the permission set overview page, under *Apps*, click **Object Settings** and ensure that your permission set license gives access to Field Service objects that they need Create, Read, Edit, and Delete access to.
Typically, users need, at minimum, access to Work Orders, Service Resources, and Service Appointments.
 11. On the permission set overview page, click **Manage Assignments** at the top of the page.
 12. Click **Add Assignments**.
 13. Select the users who need the permission set.
Assigning a permission set automatically assigns the associated permission set license to the user.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To assign a permission set license:

- "Manage Users"

To create a permission set:

- "Manage Profiles and Permission Sets"

14. Click **Assign**.

15. Repeat the previous steps until you have create a permission set for each Field Service Lightning permission set license.

1. [Field Service Permission Sets Licenses](#)

These are the available Field Service Lightning permission set licenses.

Field Service Permission Sets Licenses

These are the available Field Service Lightning permission set licenses.

License Name	Object Permissions Included
Field Service Standard	<p>“Read,” “Edit,” “Create,” and “Delete” on:</p> <ul style="list-style-type: none"> • Service Appointments • Service Resources • Service Territories • Product Items • Operating Hours • Work Types
Field Service Dispatcher	<p>“Read,” “Edit,” “Create,” and “Delete” on:</p> <ul style="list-style-type: none"> • Service Appointments • Service Resources • Service Territories • Product Items • Operating Hours • Work Types <p>If the Field Service Lightning managed package is installed, users with this permission set license have access to the dispatcher console.</p>
Field Service Scheduling	<p>“Read,” “Edit,” “Create,” and “Delete” on:</p> <ul style="list-style-type: none"> • Service Appointments • Service Resources • Service Territories • Product Items • Operating Hours • Work Types <p>If the Field Service Lightning managed package is installed, users with this permission set license are included in scheduling optimization.</p>

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

License Name	Object Permissions Included
Field Service Mobile	<p>“Read,” “Edit,” “Create,” and “Delete” on:</p> <ul style="list-style-type: none"> • Service Appointments • Service Resources • Service Territories • Product Items • Operating Hours • Work Types <p>If the Field Service Lightning managed package is installed, users with this permission set license are included in scheduling optimization.</p>

Set Up the Field Service Lightning Managed Package

The Field Service Lightning managed package builds on Salesforce’s standard field service features to deliver a rich, highly customizable experience for dispatchers and technicians.

When you implement Field Service Lightning, you select which features to use. Most features are available when Field Service Lightning is enabled in your org, but you can also install the Field Service Lightning managed package, see the Field Service Lightning Managed Package Guide that comes with the installation link.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Set Up Service Territories

A service territory represents a region in which field service can be performed. Learn how to configure service territory settings and create territories that fit your business processes.

1. [Configure Service Territory Settings](#)

Control how your users work with service territories.

2. [Create Service Territories](#)

Create service territories to track your field service work and ensure that service resources are assigned to service appointments near their home base.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Configure Service Territory Settings

Control how your users work with service territories.

 **Note:** Field Service Lightning must be enabled in your org.

1. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	"Customize Application"
View the Service Territories tab and service territories	"Read" on service territories
Create or clone service territories	"Create" on service territories
Edit service territories	"Edit" on service territories
Delete service territories	"Delete" on service territories
Create service territory members	"Edit" on service resources

2. Make the Service Territories tab visible to your users.

Users create and manage service territories from the Service Territories tab. You can add the tab to a custom app or instruct users to add the tab in Salesforce.

Create Service Territories

Create service territories to track your field service work and ensure that service resources are assigned to service appointments near their home base.

 **Tip:** If you plan to build out a hierarchy of service territories, create the highest-level territories first.

1. From the Service Territories tab, click **New**.
2. Select **Active** if you want to be able to add members to the territory or associate it with work orders, work order line items, or service appointments.

3. Enter a name and description for your territory.

The name you select depends on how your field service business is organized. For example, it might be the name of a particular county or district.

4. Optionally, enter an address.
You may want to enter the address of the territory's headquarters.
5. If your territory is part of a larger territory, select a parent territory.

 **Note:** A hierarchy of service territories can have up to 500 territories total.

6. Select operating hours for the territory, which indicate when service appointments within the territory should take place.
To create operating hours, see [Guidelines for Using Service Resources](#) on page 10.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To edit page layouts and set field history tracking:

- "Customize Application"

To create and edit users:

- "Manage Internal Users"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create service territories:

- "Create" on service territories

7. Click **Save**.
8. Optionally, assign service resources to your territory via the Service Territory Members related list.

Service territory members are resources who are available to work within the territory. If you haven't created service resource yet, know that you can also define a service resource's territories from the resource's detail page.

When you add a member, indicate whether this territory is the member's primary, secondary, or relocation territory. The primary territory is typically the territory where they work most often—for instance, near their home base—while secondary territories are territories where they can be assigned to appointments if needed. Relocation territories represent temporary moves.

 **Example:** You can create a hierarchy of territories to represent the areas where your team works in California. Include a top-level territory named *California*, three child territories named *Northern California*, *Central California*, and *Southern California*, and a series of third-level territories corresponding to California counties. Assign service resources to each county territory to indicate who is available to work in that county.

Create Operating Hours

Define operating hours and assign them to service territories, service territory members, or accounts to indicate their field service hours.

Note:

- By default, only System Administrators can view, create, and assign operating hours.
- Service resource detail pages don't list operating hours because a service resource's hours can vary depending on which territory they're working in. To view a service resource's operating hours for a particular territory, navigate to their Service Territories related list and click the Member Number for the territory. This takes you to the service territory member detail page, which lists the member's operating hours and dates during which they belong to the territory.
- If you're using the Field Service Lightning managed package, the scheduling optimizer only assigns service resources to service appointments that fall within the operating hours listed on the resource's territory member record. If you're not using the managed package, operating hours serve as a suggestion rather than a rule.

1. Click the Operating Hours tab, then click **New**.
2. Enter a name, description, and time zone.
3. Click **Save**.
4. In the Time Slots related list on the operating hours, create time slots for each day. For example, if the operating hours should be 8 AM to 5 PM Monday through Friday, create five time slots, one per day. To reflect breaks such as lunch hours, create multiple time slots in a day: for example, *Monday 8:00 AM - 12:00 PM* and *Monday 1:00 PM - 5:00 PM*. To establish 24/7 operating hours, create a time slot for each day of the week that starts at 12:00 AM and ends at 11:59 PM.

 **Tip:** Time slots don't come with any built-in rules, but you can create Apex triggers that limit time slot settings in your org. For example, you may want to restrict the start and end times on time slots to half-hour increments, or to prohibit end times later than 8 PM.

5. Assign the operating hours to one or more service territories.
 - a. Navigate to the service territory's detail page.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create operating hours:

- "Create" on operating hours

To assign operating hours to service resources:

- "Edit" on service resources

To assign operating hours to service territories:

- "Edit" on service territories

To assign operating hours to accounts:

- "Edit" on accounts

- b. Select the desired hours in the `Operating Hours` lookup field on the territory detail page, and save your changes.
6. If needed, assign different operating hours to one or more service territory members.

Service territory members—which are service resources who can work in the territory—automatically use their service territory’s operating hours. If a resource needs different operating hours than their territory, create separate operating hours for them from the `Operating Hours` tab. Then, select the desired hours in the `Operating Hours` lookup field on the service territory member detail page.

 **Note:** If a resource’s operating hours are similar to their territory’s hours, the resource’s operating hours only need time slots for the days that differ from the territory’s hours. For example, suppose a resource’s territory’s hours are 8:00 AM to 5:00 PM Monday through Friday, but the resource works 10:00 AM to 7:00 PM on Fridays. When you create operating hours for the resource, create only one time slot: *Friday 10:00 AM to 7:00 PM*. The resource automatically uses its territory’s time slots for Monday through Thursday, then uses its own special time slot on Fridays.
7. Optionally, assign operating hours to one or more accounts via the `Operating Hours` lookup field on the account detail page. An account’s operating hours help dispatchers know when to schedule service appointments for the account. For example, if ABC Labs only allows technicians to visit their office Monday through Friday from 8 AM to noon, you can create operating hours for them that reflect this preference.

Set Up Service Resources

A service resource represents a Salesforce user who can perform field service work. Learn how to create service resources and track their skills and availability.

1. [Configure Service Resource Settings](#)
Set up service resource settings and user permissions in your org.
2. [Create Service Resources](#)
Service resources are users who can perform field service work. Create service resources so you can assign them to service appointments.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Configure Service Resource Settings

Set up service resource settings and user permissions in your org.

 **Note:** Field Service Lightning must be enabled in your org.

1. Customize page layouts.

a. Decide which related lists to include on the service resource detail page layout. The following related lists are specific to field service:

- **Absences:** View and manage the service resource's absences.
- **Capacities:** View and manage the service resource's capacity, or how much they can work in a specified time period.
- **Service Appointments:** View and manage the service appointments assigned to the service resource.
- **Service Territories:** View and manage the service territories where the service resource is available to work.
- **Skills:** View and manage the service resource's skills, which represent certifications and areas of expertise.

b. Decide which fields to include on service resource page layouts. The following fields can be removed from the layouts if desired:

- **Active:** When selected, this option means that the resource can be assigned to work orders. For service tracking purposes, resources can't be deleted, so deactivating a resource is the best way to send them into retirement.
- **Capacity-Based:** Capacity-based resources are limited to a certain number of hours or appointments in a specified time period. A resource's capacity is defined in the Capacities related list.
- **Description:** A description of the resource.
- **Include in Scheduling Optimization:** When selected, this option means that the service scheduling optimizer can assign this resource to work orders during the optimization process. Use only if the Field Service Lightning managed package is installed.

2. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	"Customize Application"
View the Service Resources tab and service resources	"Read" on service resources
Create service resources	"Create" on service resources
Edit or deactivate service resources	"Edit" on service resources

3. Make the Service Resources tab visible to your users.

Users create and manage service resources from the Service Resources tab. You can add the tab to a custom app or instruct users to add the tab in Salesforce.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To edit page layouts and set field history tracking:

- "Customize Application"

To create and edit users:

- "Manage Internal Users"

Create Service Resources

Service resources are users who can perform field service work. Create service resources so you can assign them to service appointments.

1. From the Service Resources tab, click **New**.
2. Enter a name and description.
You may want the name to be the name or title of the associated user.
3. If you want to assign the resource to service appointments, select **Active**.
4. Select **Capacity-Based** if the resource is limited to working a certain number of hours or appointments in a specified time period.
Contractors would likely be capacity-based.
5. If you're using the Field Service Lightning managed package with scheduling optimization, select **Include in Scheduling Optimization** to allow the scheduling optimizer to assign the resource to service appointments during the optimization process.
Only users with the Field Service Scheduling permission set license can be included in scheduling optimization.
6. Select the user that the resource is associated with.
7. Indicate whether the resource is a technician or dispatcher.
Resources who are dispatchers can't be capacity-based or included in scheduling optimization. Only users with the Field Service Dispatcher permission set license can be dispatchers.

 **Note:** If a user is both a technician and a dispatcher, you can create two service resource records for them.

8. Click **Save**.

Once a resource is created, add information about their capabilities.

1. In the Service Territories related list, select the territories where the resource is available to work.

Indicate whether each territory is the resource's primary, secondary, or relocation territory. The primary territory is typically the territory where they work most often—for instance, near their home base—while secondary territories are territories where they can be assigned to appointments if needed. Relocation territories represent temporary moves.

For example, a service resource might have the following territories:

- Primary territory: *West Chicago*
 - Secondary territories:
 - *East Chicago*
 - *South Chicago*
 - Relocation territory: *Manhattan*, for a three-month period
2. If the resource is capacity-based, define their capacity.
 - a. In the Capacity related list, click **New Resource Capacity**.
 - b. Enter a start date and an end date to indicate when the capacity is in effect for the resource. For example, if the capacity represents a six-month contract, enter the contract's start and end dates.
 - c. Specify how much the resource can work:

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create service resources:

- "Create" on service resources

- Select the `Time Period` that the capacity is based on: hours, days, or months. For example, if the resource can work 80 hours per month, select **Month**.
 - If you want the resource's capacity to be based on the number of hours worked, fill out `Hours per Time Period`. For example, if the resource can work 80 hours per month, enter `80`.
 - If you want the resource's capacity to be based on the number of service appointments they are assigned to, fill out `Work Items per Time Period`. For example, if the resource can complete 20 appointments per month, enter `20`.
-  **Note:** If you're using the Field Service Lightning managed package and would like to measure capacity both in hours and in number of work items, enter a value for both. The resource is considered to reach their capacity based on whichever term is met first—hours or number of work items.

d. Click **Save**. You can set multiple capacities for a resource as long as their start and end dates do not overlap.

-  **Important:** If you aren't using the Field Service Lightning managed package, capacity serves more as a suggestion than a rule. Resources can still be as scheduled beyond their capacity, and you aren't notified when a resource exceeds their capacity.

3. In the Skills related list, assign skills to indicate the resource's areas of expertise. For details, see [Assign Skills to Service Resources](#).

Set Up Skills for Field Service

Assign skills to service resources to indicate the type of work that they can perform. You can also add required skills to work orders and work types so only resources with certain skills can be assigned to complete the work.

1. [Configure Skill Settings](#)

Before you create skills, add skill related lists to field service page layouts and specify who can view and create skills.

2. [Create Skills](#)

To get started with skills, create basic skills in your org. When you assign skills to service resources or mark them as required on work orders and work types, you can add details like skill level and duration.

3. [Assign Skills to Service Resources](#)

Assign skills to service resources to represent their certifications and areas of expertise.

4. [Add Required Skills to Work Orders or Work Types](#)

Add required skills to work orders, work order line items, or work types to ensure that the assigned service resources possess the right skills.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Configure Skill Settings

Before you create skills, add skill related lists to field service page layouts and specify who can view and create skills.

 **Note:** Field Service Lightning must be enabled in your org.

1. Customize page layouts.
 - a. To be able to specify required skills on work types, add the Skill Requirements related list to work type page layouts.
 - b. To be able to specify required skills on work orders, add the Skill Requirements related list to work order page layouts.
 - c. To be able to specify required skills on work order line items, add the Skill Requirements related list to work order line item page layouts.
 - d. To be able to assign skills to service resources, add the Skills related list to service resource page layouts.
2. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	"Customize Application"
Create, update, and delete skills in Setup	"Customize Application"
Assign skills to service resources	"Edit" on service resources
View resources' skills	"Read" on service resources
Add required skills to work orders, work order line items, or work types	"Edit" on work orders, work order line items, or work types
View required skills on work orders, work order line items, or work types	"Read" on work orders, work order line items, or work types

3. Decide how skill levels should be determined.

Skills assigned to a service resource or to a work order, work order line item, or work type can have a skill level from 0 to 99.99. For example, you can:

- Use the `Skill Level` field to indicate years of experience.
- Create a matrix that corresponds professional license classes to skill level numbers.

 **Tip:**

- If you'd like to limit potential skill level values, create a validation rule that, for example, only allows multiples of 10.
- Create field-level help that lets your users know how skill level is determined.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To edit page layouts:

- "Customize Application"

To create and edit users:

- "Manage Internal Users"

Create Skills

To get started with skills, create basic skills in your org. When you assign skills to service resources or mark them as required on work orders and work types, you can add details like skill level and duration.

1. From Setup, enter *Skills* in the Quick Find box, then select **Skills** under Field Service.
2. Enter a name. For example, *Electrician Certification*.
3. Enter a description.
4. Skip the “Assign Users” and “Assign Profiles” sections, which are specific to Live Agent.
5. Click **Save**.
You can now assign the skill to service resources or list it as required on work types, work orders, and work order line items.

Assign Skills to Service Resources

Assign skills to service resources to represent their certifications and areas of expertise.

1. Navigate to the resource that needs a skill assigned.
2. In the Skills related list, click **New Service Resource Skill**.
3. Select a skill. Skills must be created before they can be assigned to a resource; to learn how, see [Create Skills](#).
4. Enter a skill level from 0 to 99.99 based on how your business measures skill level.
5. Enter a start date and, if needed, an end date. For example, if a technician must be recertified in a particular skill every six months, you can enter an end date that’s six months later than the start date.
6. Click **Save**. The resource’s skill now appears in their Skills related list.



Tip: To make it easier to track a resource’s abilities, upload photos of licenses and certifications in the Files section on the resource’s detail page.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create skills:

- “Customize Application”

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To assign skills to resources:

- “Edit” on service resources

Add Required Skills to Work Orders or Work Types

Add required skills to work orders, work order line items, or work types to ensure that the assigned service resources possess the right skills.

If a work order or work order line item can only be completed by a service resource with a particular set of skills, add *required skills* to the record. Required skills help dispatchers assign the record to a service resource with the proper expertise. You can still assign a work order, work order line item, or related service appointment to a service resource that does *not* possess the required skills, so required skills serve more as a suggestion than a rule.

 **Note:** If you're using the Field Service Lightning managed package, you can use matching rules to ensure that appointments are only assigned to service resources who possess the required skills listed on the parent work order.

If many of your work orders require the same skills, we recommend adding required skills to *work types* to save yourself some time and keep your processes consistent. When you add a required skill to a work type, work orders and work order line items that use that type automatically inherit the required skill. For example, if you know that all annual maintenance visits for your Classic Refrigerator product require a Refrigerator Maintenance skill level of at least 50, you can add that required skill to the Annual Maintenance Visit work type. When it's time to create a work order for a customer's annual fridge maintenance, adding that work type to the work order adds the required skill as well.

 **Note:**

- When you create a work order from a work type, it inherits the work type's required skills, but you can then add or remove required skills on the work order.
- Changing the required skills on a work type doesn't affect the required skills on work orders that were created from that work type.
- If you add a work type to an existing work order, the work order only inherits the work type's required skills if the work order didn't yet have required skills. The same is true for work order line items.
- Work order line items don't inherit their parent work order's required skills.

To add a required skill to a work order, work order line item, or work type:

1. Navigate to the record that needs required skills.
2. In the Skill Requirements related list, click **New Skill Requirement**.
3. Select a skill. Skills must be created before they can be added as a requirement; to learn how, see [Create Skills](#).
4. Enter a skill level from 0 to 99. 99 based on how your business measures skill level.
5. Click **Save**. The skill now appears in the Skill Requirements related list on the record.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To add required skills to work orders, work order line items, or work types:

- "Edit" on work orders, work order line items, or work types

Set Up Work Orders

A work order represents work to be performed on your customers' products. Learn how to configure work order settings and create time-saving templates called work types.

1. [Configure Work Order Settings](#)

Control how your users work with work orders by customizing page layouts, user permissions, and more.

2. [Create Work Types](#)

Chances are, your business performs the same tasks for multiple customers. Work types are work order templates that save you time and make it easier to standardize your field service work.

3. [Create Work Orders](#)

Create work orders to track work to be performed for a customer.

4. [Choose Preferred Service Resources on Work Orders](#)

You can designate certain service resources as preferred, required, or excluded on specific accounts or work orders. Work orders inherit their associated account's resource preferences.

5. [Create Service Appointments](#)

Service appointments help you track field service work to be performed for customers. You can associate them with several types of records.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Configure Work Order Settings

Control how your users work with work orders by customizing page layouts, user permissions, and more.

1. Customize page layouts.

a. To let users view and create work orders that are related to other records, add the Work Orders related list to other objects' page layouts. These objects' page layouts can include the related list:

- Account
- Asset
- Case
- Contact
- Entitlement
- Service Contract
- Custom objects

b. To let users view work order line items that are associated with a particular asset, add the Work Order Line Items related list to Asset page layouts.

c. To let users make one work order the parent of another, add the `Parent Work Order` field and Child Work Orders related list to work order page layouts. To let users see the top-level work order in a work order hierarchy, you can also add the read-only `Root Work Order` field.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To edit page layouts and set field history tracking:

- "Customize Application"

To create and edit users:

- "Manage Internal Users"

- d. To let users make one work order line item the parent of another line item, add the `Parent Work Order Line Item` field and `Child Work Order Line Items` related list to work order line item page layouts. To let users see the top-level line item in a work order line item hierarchy, you can also add the read-only `Root Work Order Line Item` field.
- e. If you want to be able to designate certain service resources as preferred, required, or excluded on a work order, add the `Resource Preferences` related list to work order page layouts. You can also establish resource preferences on accounts so every work order associated with the account inherits its resource preferences. To do so, add the `Resource Preferences` related list to account page layouts as well.

2. Assign user permissions.

Users Who Will...	Need These Permissions	Permissions Are Auto-Enabled on These Standard Profiles
Enable Field Service Lightning	"Customize Application"	System Administrator
View the Work Orders tab, work orders, and work order line items	"Read" on work orders	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create or clone work orders	"Create" on work orders	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Edit work orders	"Edit" on work orders	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Delete work orders	"Delete" on work orders	System Administrator
Create, clone, edit, or delete work order line items	"Edit" on work orders	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator

3. Make the Work Orders tab visible to your users.

Users create and manage work orders from the Work Orders tab. You can add the tab to a custom app or instruct users to add the tab in Salesforce.



Note: The Work Orders tab is default ON for the following user profiles: Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator.

4. Optionally, add work orders as a navigation tab item in the service console.

5. If your org was created before Summer '16 and you want to use milestones on work orders, set field-level security on the following work order fields to expose them to specific user profiles:

- `Business Hours`
- `Entitlement Process End Time`
- `Entitlement Process Start Time`
- `Is Closed`
- `Milestone Status`
- `Milestone Status Icon`

- Stopped
- Stopped Since

 **Tip:** To set field-level security, from Setup, enter *Field Accessibility* in the Quick Find box, then click **Field Accessibility**. Click **Work Order**, then click **View by Fields** and select a field. Click **Hidden** next to a profile to view and update the field visibility settings.

6. Optionally, add your own custom values to the `status` picklist field on work orders or work order line items.

The Status field comes with these default values:

- New
- In Progress
- On Hold
- Completed
- Cannot Complete
- Closed
- Canceled

When you create a custom value, select a status category that the value falls into. The available status categories match the default status values. For example, if you create a `Waiting for Response` value, you may decide that it belongs in the `On Hold` category.

The `Status Category` field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.

7. If you want your team to be able to attach Knowledge articles to work orders or work order line items, add the Articles related list and the Knowledge One console component to your layouts.

 **Note:** Knowledge must already be set up in your org.

- To let users view and modify linked articles from the console, navigate to work order page layouts in Setup. In the layout editor, select Custom Console Components and add the Knowledge One widget to the console sidebar (recommended).
- To let users view and modify linked articles from a work order's detail page, add the Articles related list to the work order detail page layout (recommended).
- To let users attach Knowledge articles to work order line items, follow the previous two steps for work order line items layouts.

Create Work Types

Chances are, your business performs the same tasks for multiple customers. Work types are work order templates that save you time and make it easier to standardize your field service work.

1. From the Work Types tab, click **New**.
2. Enter a name and description. Try to use a name that helps users quickly understand the type of work orders that can be created from the work type. For example, *Annual Refrigerator Maintenance or Valve Replacement*.
3. Add an **Estimated Duration**, which is how long the work is estimated to take, and a **Duration Type** of Minutes or Hours.
4. If you'd like a service appointment to be automatically created on work orders and work order line items that use the work type, select **Auto-Create Service Appointment**.

 **Note:** By default, the Due Date on auto-created service appointments is seven days after the created date. Admins can adjust this offset from the Field Service Settings page in Setup.

5. Click **Save**.
6. If the task represented by the work type requires certain skills or certifications, define them in the Skill Requirements related list.
 - a. In the related list, click **New Skill Requirement**.
 - b. Select a skill. Skills must be created before they can be added as a required skill; to learn how, see [Create Skills](#).
 - c. Enter a skill level from 0 to 99.99 based on how your business measures skill level.
 - d. Click **Save**. Now, any work orders or work order line items linked to the work type inherits these required skills.
7. To apply a work type to a work order or work order line item, select the work type in the **Work Type** lookup field on the record. When you add a work type, the work order or work order line item inherits the work type's duration values and required skills.

 **Note:**

- If needed, you can update the duration values and required skills on a work order or work order line item after they're inherited from the work type.
- If a work order or work order line item already has required skills, associating it with a work type doesn't cause it to inherit the work type's required skills.
- Customizations to required skills, such as validation rules or Apex triggers, are not carried over from work types to work orders and work order line items.

 **Example:** Suppose you own a window company that often installs windows. Your window installations typically last 90 minutes. You can create a work type with the following settings:

- Name: *Window Installation*
- Description: *Standard installation of single- or double-paned windows*
- Estimated Duration: *90*
- Duration Type: *Minutes*
- Skill Requirements:
 - "Window Installation" with a skill level of 50
 - "Window Cleaning" with a skill level of 10

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create work types:

- "Create" on work types

To apply work types to work orders or work order line items:

- "Edit" on work orders

- The option to auto-create a service appointment is selected

When a customer needs a window installed, create a work order for them and select the *Window Installation* work type in the `Work Type` lookup field. This auto-populates the work order's duration and skill values and automatically creates a service appointment on the work order. High-five for efficiency!

Create Work Orders

Create work orders to track work to be performed for a customer.

You can create and edit work orders from the Work Orders tab or the Work Orders related list on supported objects. Some of the following settings may not be available to you depending on your page layouts and field-level security settings.

1. From the Work Orders tab or the Work Orders related list on a record, click **New**.
2. Optionally, select a work type. Work types are templates that auto-populate the work order's `Duration` and `Duration Type` fields and Skill Requirements related list.
3. Enter the address where the work order is taking place. Work orders inherit their address from the associated account. The work order's service appointments and line items inherit its address, though the address on line items can be updated.
4. Select an associated account and contact.
5. If applicable, select a parent work order.
6. If applicable, select an associated case.
7. Optionally, select a price book. This lets you select a corresponding price book entry (product) for each work order line item.
8. If you're tracking pricing on work orders, enter the tax amount. For example, in a work order whose total price is \$200, enter *20* to apply a 10 percent tax. You can enter a number with or without the currency symbol and you can use up to two decimal places.
9. Select a priority level.
10. Select the service territory where the work order is taking place.
11. Enter a duration and select a duration type. A duration of *3* and a duration type of *Hours* means the work order is expected to be completed in 3 hours.
12. If the work order involves a customer's asset, add it in the `Asset` field.
13. Add a subject and description. Try to describe the nature and purpose of the work to be completed.
14. Click **Save**.
15. Optionally, add further details in the work order's related lists.
 - a. Create line items via the Work Order Line Items related list. Work order line items represent specific tasks that a technician must perform to complete the work order. They can be marked as completed one by one, and can each have their own active service appointment. Pricing details like discounts and unit price are set at the line item level on work orders.
 - b. Specify which skills are required to complete the work order via the Skill Requirements related list. For details, see [Add Required Skills to Work Orders or Work Types](#).
 - c. Create a service appointment via the Service Appointments related list. Service appointments are where you assign service resources and add scheduling details. Work orders and work order line items can have multiple service appointments.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

USER PERMISSIONS

To create or clone work orders:

- "Create" on work orders

To create work order line items:

- "Edit" on work orders

 **Note:** If **Auto-Complete Service Appointment** is selected on the associated work type, a service appointment is automatically created when you create the work order.

Choose Preferred Service Resources on Work Orders

You can designate certain service resources as preferred, required, or excluded on specific accounts or work orders. Work orders inherit their associated account's resource preferences.

Add preferences to an account or work order via the Resource Preferences related list. Simply select the service resource, select a preference level, and save your changes.

 **Note:** You can't add preferences for service resources who are inactive or dispatchers.

Resource preferences serve more as a suggestion than a requirement. You can still assign a service appointment to any resource regardless of the related work order's resource preferences.

If you don't want to establish resource preferences at the account level, you can also create them on individual work orders if needed.

Example:

- If your customer, ABC Labs, has had positive experiences with Alicia, a service resource, you can create a resource preference on the ABC Labs account that designates Alicia as "Preferred"
- If ABC Labs had a bad experience with Nigel, a service resource, you can create a resource preference on the ABC Labs account that designates Nigel as "Excluded"
- If ABC Labs purchased a challenging piece of equipment which was installed by Evan, a service resource, you can create a resource preference on the ABC Labs account that designates Evan as "Required"

When a work order is created for ABC Labs, it automatically lists those three preferences.

When the time comes to schedule the work order, the dispatcher knows to assign the corresponding service appointment to Evan and, if a second technician is needed, to Alicia if she is available. The dispatcher also knows *never* to assign the account's service appointments to Nigel.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create resource preferences on accounts:

- "Edit" on accounts

To create resource preferences on work orders:

- "Edit" on work orders

Create Service Appointments

Service appointments help you track field service work to be performed for customers. You can associate them with several types of records.

Service appointments can be added to work orders, work order line items, opportunities, accounts, or assets. To create a service appointment:

1. Navigate to the record that the appointment is associated with.
 2. In the Service Appointments related list, click **New Service Appointment**.
 3. Fill out the General Information section:
 - a. Add an appointment subject and description.
 - b. If needed, update the duration. If the parent record is work order or work order line item, the appointment inherits its duration from its parent.
 - c. Fill out the `Earliest Start Permitted` and `Due Date` fields, which together represent the window during which the appointment must be completed. These fields typically represent terms in the customer's service-level agreement.
 4. Fill out the Scheduled Times section:
 - a. Add scheduled start and end times. If you're using the Field Service Lightning managed package with the scheduling optimizer, these fields are populated when the appointment is scheduled.
 - b. Define an arrival window, which is the window of time when the technician is expected to arrive at the site. This window is typically larger than the scheduled start and end window to allow time for delays and scheduling changes. You may choose to share the arrival window start and end with the customer, but keep the scheduled start and end internal-only.
 5. Assign service resources to the appointment in the Assigned Resources related list. If the parent record is a work order, work order line item, or account, check the parent for any resource preferences.
-  **Note:** Service resource who are dispatchers can't be assigned to service appointments.
6. When the technician completes the appointment, have them fill out the Actual Times section to indicate when the appointment started and ended. In addition, they can enter the number of minutes it took to travel to the appointment in the `Actual Travel Time` field on their assigned resource record.

 **Note:** You can also create service appointments from the Service Appointments tab.

Set Up Locations for Field Service

For Field Service, your locations can be vans, warehouses, customer sites, or whatever suits your organization. Learn how to create service locations and track their consumption and availability.

[Configure Field Service Location Settings](#)

Control how your users work with Field Service locations.

[Create Field Service Locations](#)

Create inventory locations so you can track the parts stored there and restock when necessary.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create service appointments:

- "Create" on service appointments

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Configure Field Service Location Settings

Control how your users work with Field Service locations.

 **Note:** Field Service Lightning must be enabled in your org.

Your service locations can be as large as a warehouse or as small as a tool box. They can be your client sites or your service vans. They vary in size, location, and what they contain, and they are unique to your company. Salesforce Field Service lets you create locations to fit your needs.

1. Assign [user permissions](#).

Users Who Will...	Need These Permissions
Enable Field Service Lightning	"Customize Application"
View the Locations tab	"Read" on Locations
Create or clone locations	"Create" on Locations
Edit service locations	"Edit" on Locations
Delete service locations	"Delete" on Locations

2. Customize the *Addresses* page layout.

Addresses allow you to set up multiple addresses and address types. For example, a customer's shipping address may be different from the physical address.

- a. From Setup enter *Addresses* in the Quick Find box, then select **Page Layouts** under Addresses.
- b. Click **Edit** next to a layout you want to change or click **New** to create one.
- c. Select and arrange the [fields](#) on page 66 on the addresses related list.
- d. Click **Save**.

3. Customize the *Associated Locations* page layout.

Associated locations allow you to set up associate multiple accounts with one location. For example, a shopping center location may have multiple customer accounts.

- a. From Setup enter *Associated Locations* in the Quick Find box, then select **Page Layouts** under Associated Locations.
- b. Click **Edit** next to a layout you want to change or click **New** to create one.
- c. Select and arrange the [fields](#) on page 66 on the associated locations related list.
- d. Click **Save**.

4. Customize the *Locations* page layout.

- a. From Setup enter *Locations* in the Quick Find box, then select **Page Layouts** under Locations.
- b. Click **Edit** next to a layout you want to change or click **New** to create one.
- c. Select and arrange the [fields](#) on the Locations page layout.
- d. Add the *Product Items*, *Addresses*, and *Associated Locations* related lists to the Locations page layout.
- e. Click **Save**.

USER PERMISSIONS

To edit page layouts and set field history tracking:

- "Customize Application"

To create and edit users:

- "Manage Internal Users"

5. Make the Locations tab visible to your users.
Users create and manage service locations from the Locations tab. You can add the tabs to a custom app or instruct users to add them in Salesforce.

Create Field Service Locations

Create inventory locations so you can track the parts stored there and restock when necessary.

 **Note:** Field Service Lightning must be enabled in your org.

1. From the Locations tab, click **New** or to change an existing location, click its name.
2. Enter a location name.
3. Select a [Location type](#).
4. To use this product item with Field Service, check `Inventory Location`.
5. If this location is a mobile, like a van or tool box, check `Mobile Location`.
6. Complete any other fields as appropriate.
Depending on the page layout, there might be other fields that are not required for Field Service but are helpful.
7. Click **Save**.

Set Up Parts and Van Stock

Parts and van stock represent a list of items necessary to complete work orders. Learn how to create parts and van stock and track their consumption and availability.

[Configure Parts and Van Stock Settings](#)

Control how your users work with parts and van stock.

[Create Parts and Van Stock](#)

Product items are products at a specific location. Create product items so you can track their usage and restock when necessary.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create locations:

- "Create" on Locations

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Configure Parts and Van Stock Settings

Control how your users work with parts and van stock.

 **Note:** Field Service Lightning must be enabled in your org.

Parts and Van Stock consists of the Product Item object and three related lists: Required Products, Consumed Products, and Product Item Transactions.

- The Product Item object associates a product with a location.
- The Required Products related list is added to the work order or work order line item to track parts needed of a job type.
- The Consumed Products related list is added to the work order or work order line item to track the parts used to complete the work.
- The Product Item Transactions related list is added to the Product Item object to track the use and restock of the product at its location.

1. Assign [user permissions](#).

Users Who Will...	Need These Permissions
Enable Field Service Lightning	"Customize Application"
View the Products tab	"Read" on Products
View the Product Items tab	"Read" on Product Items
Create or clone products	"Create" on Product Items
Edit service products	"Edit" on Product Items
Delete service products	"Delete" on Product Items

2. Customize the Product Item page layout.

- a. From Setup enter *Product Items* in the Quick Find box, then select **Page Layouts** under Product Items.
- b. Click **Edit** next to a layout you want to change or click **New** to create one.
- c. Select and arrange the [fields](#) on the Product Item page layout.
- d. Add *Product Item Transactions* related list to the Product Item page layout.
- e. Click **Save**.

3. Make the Products and Product Items tabs visible to your users.

Users create and manage product items from the Product Items tab. You can add the tabs to a custom app or instruct users to add them in Salesforce.

4. Customize the Products Required page layout.

- a. From Setup enter *Products Required* in the Quick Find box, then select **Page Layouts** under Products Required.
- b. Click **Edit** next to a layout you want to change or click **New** to create one.
- c. Select and arrange the [fields](#) on the Products Required page layout.
- d. Click **Save**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To edit page layouts and set field history tracking:

- "Customize Application"

To create and edit users:

- "Manage Internal Users"

5. Customize the Products Consumed page layout.
 - a. From Setup enter *Products Required* in the Quick Find box, then select **Page Layouts** under Products Consumed.
 - b. Click **Edit** next to a layout you want to change or click **New** to create one.
 - c. Select and arrange the [fields](#) on the Products Consumed page layout.
 - d. Click **Save**.
6. Add *Products Consumed* and *Products Required* related lists to the Work Order and Work Order Line Item page layouts.
For work order user permissions, see [Configure Work Order Settings](#).
7. Customize the Product Item Transactions page layout.
 - a. From Setup enter *Product Items* in the Quick Find box, then select **Page Layouts** under Product Item Transactions.
 - b. Click **Edit** next to a layout you want to change or click **New** to create one.
 - c. Select and arrange the [fields](#) on the Product Item Transactions page layout.
 - d. Click **Save**.

Create Parts and Van Stock

Product items are products at a specific location. Create product items so you can track their usage and restock when necessary.

 **Note:** Field Service Lightning must be enabled in your org.

1. From the Product Items tab, click **New**.
2. Use the look up field to enter a product name within your org.
To add products to your org, see .
3. Use the look up field to enter a location within your org.
To add products to your org, see [Create Field Service Locations](#).
4. Enter the amount at this location in *Quantity on Hand*.

 **Note:** To add a serial number this value must be 1.
5. If needed, add a unit of measure, for example, grams, liters, or units.
Set *Quantity Unit of Measure* picklist values from the product standard fields list.
 - a. From Setup, enter *Products* in the *Quick Find* box, then select **Fields** under Products.
 - b. Click *Quantity Unit of Measure*.
 - c. In the *Quantity Unit of Measure Picklist Values* related list, click **Edit** to change the default or **New** to add values.
 - d. Make changes or enter new values.
 - e. Click **Save**.
6. If the quantity on hand is 1, enter its serial number.
7. Click **Save**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create product items:

- "Create" on product items

Set Up Customer Service Reports

Make your customers happy with fast field service reports delivered to their inboxes. Your technicians and dispatchers can create reports for work orders, work order line items, and service appointments and email them directly to the customer. You can use standard templates or create variations of your own.

[Configure Customer Service Report Settings](#)

Control what information your customer service reports contain.

[Create a Customer Service Report](#)

Create customer service reports and provide detailed information on each work order, work order line item, and service appointment.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Configure Customer Service Report Settings

Control what information your customer service reports contain.

 **Note:** Field Service Lightning must be enabled in your org.

1. From Setup enter *Service Report* in the Quick Find box, then click **Service Report Templates** under Field Service.
2. Click **New** or **Edit** next to a report template you'd like to adjust.
3. If you are creating a template, select an existing template as its base and give it a name.
4. On the Service Report Template create page, add the [fields](#) on page 73 to the appropriate sections.

You can change templates and their related objects. However, when you change templates without saving, you lose your changes.

 **Note:** Related Templates are

- Service Appointment for Work Order
- Service Appointment for Work Order Line Item
- Work Order
- Work Order Line Item

5. Click **Save**.

 **Note:** When you preview the report template, it shows the system administrator profile view. Depending on field-level security settings, other profiles may not see all fields. The data shown is simulated, except for images and rich text.

6. On the page layouts of Work Orders, Work Order Line Items, and Service Appointments, add the button **Create Service Report**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To edit page layouts and set field history tracking:

- "Customize Application"

To create and edit users:

- "Manage Internal Users"

Create a Customer Service Report

Create customer service reports and provide detailed information on each work order, work order line item, and service appointment.

 **Note:** Field Service Lightning must be enabled in your org.

1. From a work order, work order line item, or service appointment, click **Create Service Report**.
2. Use the lookup to find the template you'd like to use.
3. Click **Create Service Report**.
The service report preview displays.
4. To save the service report to the object, click **Create Service Report**. To save the report to the object and send a copy to the customer, click **Create and Send Service Report**.
The service report is saved in the Service Reports related list on its object (work order, work order line item, or service appointment).
5. To send the service report to the customer, fill out the Send Email information as appropriate, and click **Send**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create service reports:

- "Create" on Service Report

Create Field Service Lightning Reports

Create report types to track field service progress in your org.

You can create a variety of custom report types to stay informed about field service records.

1. From Setup, enter *Report Types* in the Quick Find box, then select **Report Types** and click **New Custom Report Type**.
2. In the Primary Object drop-down menu, select the field service object you want to report on:

Primary Object	Description	Available Secondary Objects
Operating Hours	View the operating hours of service territories and their members.	Service Territories Time Slots
Service Appointments	Compare the differences between scheduled and actual appointment times, and analyze trends in resource assignment on appointments.	Assigned Resources
Service Resources	Compare service resources' capacities, absences, and skills, and view the territories they belong to and service appointments they are assigned to. And, see which accounts or work orders list resources as preferred.	Assigned Resources Resource Absences Resource Capacities Resource Preferences Service Resource Skills Service Territory Members

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features and managed package are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To create or update custom report types:

- "Manage Custom Report Types"

To create a public reports folder:

- "Manage Public Reports"

Primary Object	Description	Available Secondary Objects
Service Territories	Compare the number and types of service appointments, work orders, and work order line items across service territories, and view the service resources who belong to each territory.	Service Appointments Service Territory Members Work Orders Work Order Line Items
Work Orders	Compare information such as the number of appointments or line items per work order, or work order service territories. And, analyze how resource preferences and skill requirements vary between work orders.	Resource Preferences Service Appointments Skill Requirements Work Order Line Items
Work Order Line Items	Compare information such as work order line items' owners, duration, and subject, and view service appointments and skill requirements associated with work order line items.	Service Appointments Skill Requirements
Work Types	Compare information such as work type duration and skill requirements.	Skill Requirements
Accounts	Compare accounts' resource preferences and work orders.	<i>Field service objects:</i> Resource Preferences Work Orders
Assets	Compare the number and characteristics of work orders associated with assets.	<i>Field service objects:</i> Work Orders
Cases	Compare the number and characteristics of work orders associated with cases.	<i>Field service objects:</i> Work Orders
Contacts	Analyze the service appointments and work orders associated with contacts.	<i>Field service objects:</i> Service Appointments Work Orders
Entitlements	Compare the number and characteristics of work orders associated with entitlements.	<i>Field service objects:</i> Work Orders
Service Contracts	Compare the number and characteristics of work orders associated with service contracts.	<i>Field service objects:</i> Work Orders

3. Complete the required fields and click **Next**.



Tip: In the `Store in Category` drop-down menu, we recommend choosing **Customer Support Reports** or **Other Reports**. This is the category where users find the custom report type on the Reports tab. You can also create your own field service report folder. Make your choices on the Define Report Records Set page.

4. Click **Save**.
5. As needed, remove and rearrange fields from your report layout.

FIELD SERVICE LIGHTNING CONSIDERATIONS

Before you set up Field Service Lightning, review these important considerations about its features.

[Field Service Lightning Limits and Limitations](#)

Learn about the limits and limitations that exist for Field Service Lightning.

[Location Tracking in Field Service Lightning](#)

When you add a street address to certain types of field service records, Salesforce calculates the address's latitude, longitude, and location accuracy. You can reference this data, which is visible only in the API, in any custom field service applications.

[Considerations for Using Work Orders](#)

Gain insight into the ways you can and should use work orders to make your business run smoothly.

Field Service Lightning Limits and Limitations

Learn about the limits and limitations that exist for Field Service Lightning.

Linked Articles

Linked articles are Knowledge articles attached to work orders or work order line items. They include the following limitations.

- The Article widget and Feed Articles Tool aren't available in the feed view.
- Quick actions and global actions aren't supported for linked articles.
- The Article Toolbar on the Knowledge home page doesn't include the option to attach articles to work orders or work order line items.
- The Linked Work Orders and Linked Work Order Line Items related lists on articles aren't available in Lightning Experience or Salesforce1.
- Linked articles are view-only in Lightning Experience and Salesforce1.
- In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic. In Salesforce1, linked articles can't be accessed from feed items.

Operating Hours

You can't create custom fields on operating hours or time slots.

Service Territories

- A service territory hierarchy can contain up to 500 territories.

Work Orders

- A work order hierarchy can have up to 10,000 work orders.
- A work order line item hierarchy can have up to 10,000 work order line items.

Salesforce1

The Field Service Lightning standard features and managed package are available in all versions of the Salesforce1 mobile app. They include the following limitations:

- In the Salesforce1 downloadable app for iOS:
 - You can't create service appointments, and the Recent related list isn't available.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features and managed package are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud. Work orders are also available in **Professional** Edition.

- You can't create new service resources or absences, and the Recent related list isn't available on service resources or absences.
- On field service records created via a related list, the field that lists the parent record doesn't populate until you save the record. This issue applies to all versions of Salesforce1. For example, when you create a service appointment from the Service Appointments related list on a work order, the `Parent Record` field is blank until you tap **Save**. Once the record is created, the parent record field lists the parent work order as expected.
- The dispatcher console, which is part of the managed package, isn't available in Salesforce1.

Location Tracking in Field Service Lightning

When you add a street address to certain types of field service records, Salesforce calculates the address's latitude, longitude, and location accuracy. You can reference this data, which is visible only in the API, in any custom field service applications.

This location data feature, known as "geocoding", is enabled for all supported field service objects when you enable Field Service Lightning. In the API, you'll notice values in the following three fields on work orders, work order line items, service appointments, service territories, resource absences, and service territory members:

Field Name	Description
<code>Latitude</code>	The latitude of the street address.
<code>Longitude</code>	The longitude of the street address.
<code>GeocodeAccuracy</code>	<p>The accuracy of the latitude and longitude. This field contains one of the following values, listed in order from most to least accurate:</p> <ul style="list-style-type: none"> • <code>Address</code>—In the same building • <code>NearAddress</code>—Near the address • <code>Block</code>—Midway point of the block • <code>Street</code>—Midway point of the street • <code>ExtendedZip</code>—Center of the extended zip code area • <code>Zip</code>—Center of the zip code area • <code>Neighborhood</code>—Center of the neighborhood • <code>City</code>—Center of the city • <code>County</code>—Center of the county • <code>State</code>—Center of the state • <code>Unknown</code>—No match for the address was found (for instance, the address is invalid)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Keeping Geocoding Data Current

Salesforce periodically refreshes these three geocoding fields to ensure their accuracy. The refreshes are managed by a feature known as "clean rules" (because they keep your data clean and current!). A record's geocoding fields are refreshed when:

- The record is created or updated
- The record type's clean rule is deactivated and reactivated

 **Note:**

- Allow some time for the geocoding fields to refresh. The amount of processing time varies based on how many records are being updated at once.
- If bulk geocoding is turned off for a clean rule, deactivating or reactivating the rule does not refresh the geocoding fields. Bulk geocoding is enabled by default.

You can keep an eye on the status of a record's geocoding data in several ways.

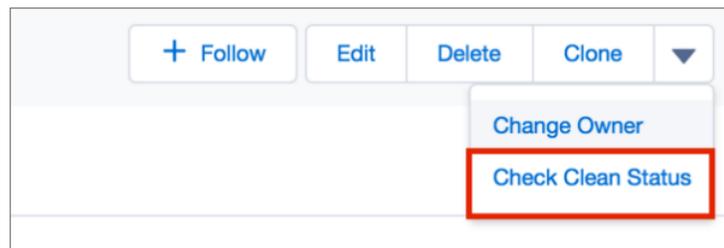
- *If you're using Salesforce Classic:*

Add the Clean This Record with Data.com related list to the detail page layout of the records you'd like to track. The related list includes:

- The time the record's geocoding data was last refreshed.
- The record's geocoding status. To learn what each status means, see [Data.com Clean Statuses](#). The `In Sync` status means that your geocoding data is current.
- A **Clean** link which lets you manually run an instant refresh.

- *If you're using Lightning Experience*

On the record, select **Check Clean Status** in the action drop-down menu to view its geocoding status.



Turn Off GPS Tracking for Individual Users

If your org has tracking turned on at the org level, but a few technicians need it off, add the `Exclude Technician from Geolocation Tracking` permission on their user profile.

How to Opt Out

If you're already using another geocoding service and prefer not to use this feature, you can opt out of Field Service Lightning geocoding.

1. From Setup, enter `Data.com` in the Quick Find box, then select **Clean Rules** under Data.com Administration.
2. Find the entries for Field Service Lightning and click **Deactivate** next to each rule:
 - Geocodes for Work Order Address
 - Geocodes for Work Order Line Item Address
 - Geocodes for Service Appointment Address
 - Geocodes for Service Territory Address
 - Geocodes for Service Territory Member Address
 - Geocodes for Resource Absence Address

 Note:

- If you're using the Field Service Lightning managed package, opting out of geocoding means that latitude, longitude, and geocode accuracy are no longer calculated for field service records. Without this geocoding data, the scheduling optimizer doesn't function properly.
- If you were using work orders before Winter '17, enabling Field Service Lightning automatically turns on geocoding for all existing work orders in your org and populates their geocoding fields. If you don't enable Field Service Lightning, the geocoding feature isn't available for work orders.

Considerations for Using Work Orders

Gain insight into the ways you can and should use work orders to make your business run smoothly.

[How Work Orders Fit Into Your Support Process](#)

Work orders are a handy support tool, particularly if you offer field service. You can incorporate work orders into your support process in several ways.

[How Pricing Works on Work Orders](#)

Work orders and work order line items have several price-related fields. Find out how they interact and how to use them.

[Apex Code Samples for Work Orders](#)

Use these Apex samples to customize and automate the role of work orders in your support process.

How Work Orders Fit Into Your Support Process

Work orders are a handy support tool, particularly if you offer field service. You can incorporate work orders into your support process in several ways.

Here are some recommended approaches:

Situation	How to Use Work Orders to Address the Situation
<p>Fixing a broken asset: A customer purchases an asset (like a car) from you. They experience a problem with the asset, so they call you to report the problem. An agent creates a case from the call, and determines that a technician must be sent to the customer to repair the asset.</p>	<ol style="list-style-type: none"> 1. The agent creates a "Repair Asset" work order for the asset with a brief description of the problem. 2. The agent creates a service appointment on the work order and assigns it to an available service resource. 3. The service resource is dispatched to repair the asset. 4. The service resource learns that a crucial replacement part is missing. She changes the status of the service appointment to <code>Completed</code> and creates a second service appointment on the work order to install the replacement part.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

Situation	How to Use Work Orders to Address the Situation
	<ol style="list-style-type: none"> 5. When the part is installed and the second appointment is completed, the assigned service resource changes the status on both the service appointment and its parent work order to <i>Completed</i>. 6. The agent closes the case.
<p>Performing preventive maintenance: A customer purchases an asset from you and covers it with a five-year preventive maintenance contract. The contract entitles the customer to one preventive maintenance checkup each year. The annual maintenance checkup is represented in Salesforce by an entitlement that's linked to the asset record.</p>	<ol style="list-style-type: none"> 1. A service agent creates an "Annual Maintenance Checkup" work order on the asset. 2. The agent adds line items to the work order which represent the maintenance tasks that the technician must complete. 3. The agent creates a service appointment on the work order and assigns it to a service resource. 4. The service resource is dispatched to complete the maintenance check. 5. As each line item on the work order is completed, the resource changes the line item status to <i>Completed</i>. When all line items are complete, the resource changes the status of both the service appointment and its parent work order to <i>Completed</i>. 6. For the following annual maintenance on the asset, the agent can quickly create a clone of this work order.

While these approaches reflect typical uses of work orders, there are many ways to customize the way you use work orders. Here are some examples.

- Create a "New Work Order" quick action on assets, cases, and accounts.
 -  **Note:** Entitlements and service contracts don't support quick actions.
- Set up a quick action on work orders that automatically updates new work orders' account, asset, and contact fields to match their parent record.
- If your org uses hierarchical assets, track specific subtasks more accurately by associating work order line items with different assets. For example, a work order linked to the "automobile" asset can have a line item linked to the child "headlight" asset. You can add the Work Order Line Items related list to asset page layouts to let users view all line items associated with an asset.

For Apex code samples that you can use to customize work orders in your org, see [Apex Code Samples for Work Orders](#).

How Pricing Works on Work Orders

Work orders and work order line items have several price-related fields. Find out how they interact and how to use them.

Work orders contain the following price-related fields. If you intend to use these fields, add them to work order page layouts.

Work Order Field	What It Represents
Discount	(Read only) The weighted average of the discounts on all line items on the work order. It can be any positive number up to 100.
Subtotal	(Read only) The total of the work order line items before discounts and taxes are applied.
Total Price	(Read only) The total of the work order line items' price after discounts but before tax is added.
Grand Total	(Read only) The total price of the work order with tax added.
Price Book	The price book associated with the work order. Adding a price book to the work order lets you link each work order line item to a product included in the price book.
Tax	The total tax on the work order in a currency format. (Do not enter a percentage.) For example, in a work order whose total price is \$100, enter \$10 to apply a 10 percent tax. You can enter a number with or without the currency symbol and you can use up to two decimal places.

And *work order line items* contain these price-related fields. If you intend to use these fields, add them to work order line item page layouts.

Work Order Line Item Field	What It Represents
Discount	The percent discount to be applied to the line item's subtotal. You can enter a number with or without the percent symbol and you can use up to two decimal places.
Subtotal	(Read only) The line item's unit price multiplied by the quantity.
Total Price	(Read only) The line item's subtotal with discounts applied. This field is blank until you add a unit price and save the line item.

EDITIONS

Available in: **Salesforce Classic and Lightning Experience**

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions** with the Service Cloud

Work Order Line Item Field	What It Represents
List Price	<p>(Read only) The price of the line item (product) as listed in its corresponding price book entry. If a product isn't selected, the list price defaults to zero.</p> <p> Note: When you select a product to link to the line item, you can see the product's list price next to its name and ID in the lookup window. The list price field populates when you save the line item.</p>
Product	<p>The name of the product associated with the line item. The lookup only lists products that are included in the parent work order's price book. When you select a product and save the line item, the following fields are populated on the line item:</p> <ul style="list-style-type: none"> • List Price • Unit Price • Subtotal • Total Price <p> Note: Inline editing isn't supported on the Product field. To change the product on a line item, click Edit. Adding a product updates the list price, unit price, subtotal, and total price based on the related entry in the work order's price book.</p>
Unit Price	<p>By default, the unit price for a work order line item is the line item's list price from the price book, but you can change it.</p>

When filling out price fields on work orders and their line items, keep these guidelines in mind:

- To apply a discount to a work order, apply the discount at the line item level. If your work order doesn't have line items, its discount is zero.
- When filling out price fields on a work order, just fill out the `Price Book` and `Tax` fields. The `Discount`, `Subtotal`, `Total Price`, and `Grand Total` fields are all automatically calculated based on line item fields.
- When filling out price fields on a work order line item, just fill out the `Product` and `Discount` fields. The `Subtotal`, `Total Price`, `List Price`, and `Unit Price` fields are all automatically calculated based on other line item fields.
- Work order line items don't have to be linked to a product. For example, you might prefer to use work order line items to track tasks. Just keep in mind that if the `Product` field is blank, you can't use the `List Price`, `Unit Price`, `Discount`, `Quantity`, `Subtotal`, or `Total Price` fields.

 **Note:**

- You can't delete a price book that's linked to a work order.
- You can't delete a product that's linked to a work order line item.
- You can't delete a price book entry that's linked to a work order line item. Price book entries are linked to work order line items via the `Product` lookup field.
- You can't remove a price book from a work order if its line items are linked to products from that price book.

- Products cannot be added to work order line items in Lightning Experience. Use Salesforce Classic or the API. If a work order line item was created in Salesforce Classic and includes a product, the quantity and unit price can be updated in Lightning Experience, but the product can't be updated.

Apex Code Samples for Work Orders

Use these Apex samples to customize and automate the role of work orders in your support process.

 **Tip:** New to Apex? Check out the [Force.com Apex Code Developer's Guide](#).

Sample Trigger 1

This trigger prevents users from closing a work order unless all its line items have been closed. It's a good way to ensure that all scheduled tasks are completed.

To define a work order trigger in your org:

1. From Setup, enter *Work Orders* in the Quick Find box, then click **Triggers** under Work Orders.
2. Click **New**.
3. Copy the trigger text and paste it into the text field.
4. Click **Save**.

```
trigger ValidateWorkOrderLineItem on WorkOrder (before update) {
    for(WorkOrder w : Trigger.New) {
        if(w.Status == 'Closed'){
            List<WorkOrderLineItem> woLineItemList = [Select wo.Status
                From WorkOrderLineItem wo where wo.WorkOrderId=:w.Id];
            if(woLineItemList.isEmpty()==false) {
                for(WorkOrderLineItem woLineItem : woLineItemList){
                    if(woLineItem.Status != 'Closed'){
                        w.addError('You cannot close a work order until all of its
line items are closed.');
```

Sample Trigger 2

This trigger automatically closes a case when a work order on the case is marked Closed. If a case has multiple work orders, the trigger fires when the first work order is marked Closed. That way, the support agent doesn't have to manually close the case after the related work is complete.

```
trigger CloseCaseWhenWoId on WorkOrder (after update) {
    for (WorkOrder wo: Trigger.new) {
        try {
            if (wo.Status == 'closed') {
                Case ca = [SELECT Status from case where id = :wo.CaseId];
                ca.Status = 'closed';
                update ca;
            }
        }
    }
}
```

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

```

        } catch (Exception e) {
            }
    }
}

```

Trigger 2 Unit Test

You can set up Apex unit tests in the developer console to scan your code for any issues. To keep things running smoothly, Salesforce requires at least three-quarters of your Apex code lines to be covered by tests. This unit test applies to Sample Trigger 2.

```

@isTest
private class WOTriggerTest {
    static testMethod void validateWO() {
        Case ca = new Case();
        ca.Origin = 'Phone';
        ca.Status = 'new';
        insert(ca);
        WorkOrder wo = new WorkOrder();
        wo.Subject = 'test';
        wo.Status = 'closed';
        wo.CaseId = ca.Id;
        insert(wo);
        update(wo);
        Case cal = [SELECT Status from Case where id= :ca.Id];
        System.assertEquals('Closed', cal.Status);
    }
}

```

Work Order Apex Class

Apex classes reduce the size of your triggers and make it easier to reuse and maintain Apex code. This class, which you can reference in triggers, creates a work order with one line item.

```

public class CreateWorkOrderLineItem{
public WorkOrderLineItem createWorkOrderLineItem(){
    WorkOrder wo = new WorkOrder();
    wo.subject = 'title';
    insert wo;
    WorkOrderLineItem woli = new WorkOrderLineItem();
    woli.workOrderId = wo.Id;
    woli.description = 'abcd';
    return woli;
}
}

```

Work Order Apex Class Unit Test

This unit test applies to the Work Order Apex Class.

```

@isTest
public class TestWorkOrderLineItem {
    static testMethod void testCreateWorkOrderLineItem()
    {
        CreateWorkOrderLineItem cwoLi = new CreateWorkOrderLineItem();
        cwoLi.createWorkOrderLineItem();
    }
}

```

FIELD SERVICE LIGHTNING GUIDELINES

Learn how and when to use Field Service Lightning features.

[Guidelines for Using Service Territories](#)

Service territories represent regions in which your team performs field service work. Learn how to create and manage service territories.

[Guidelines for Using Service Resources](#)

Service resources are users who can perform field service work. Learn how to create and manage service resources.

[Guidelines for Using Work Orders](#)

Work orders help you track tasks to be performed on a product. Learn how to create and manage work orders.

[Guidelines for Using Service Appointments](#)

A service appointment is an appointment for a field service technician to perform work for a customer. Learn how to create and manage service appointments.

[Guidelines for Using Knowledge with Work Orders](#)

You can attach Knowledge articles to work orders and work order line items to help technicians in the field access important procedural info, guidelines, specs, and more.

Guidelines for Using Service Territories

Service territories represent regions in which your team performs field service work. Learn how to create and manage service territories.

Viewing Service Territories

View service territories on the Service Territories tab. You can also view a service resource's territories on the Service Territories related list on the resource detail page.

Creating Service Territories

If you want to use service territories, determine which territories you need to create. Depending on how your business works, you may decide to create territories based on cities, counties, or other factors. If you plan to build out a hierarchy of service territories, create the highest-level territories first. Service territory hierarchies can contain up to 500 territories.

Create service territories from the Service Territories tab in Salesforce. After you create a territory, you can add members to it via the Service Territory Members related list. Service territory members are resources who work within the territory, and associating them with a territory ensures that they're assigned to appointments near their home base.

Assigning Service Territories to Service Resources

You can link a service resource to multiple territories to indicate where they are available to work. Assign territories to a resource via the Service Territories related list on the resource detail page, or via the Service Territory Members related list on the territory detail page.

When you assign a territory to a resource, use the `TYPE` field to indicate whether the territory is a primary, secondary, or relocation territory for the resource.

- The *primary* territory is typically the territory where the resource works most often—for instance, near their home base. Resources can have only one primary territory.
- *Secondary* territories are territories where the resource can be assigned to appointments if needed. A resource can have more than one secondary territory.
- *Relocation* territories represent temporary moves. If you're using the Field Service Lightning managed package with the scheduling optimizer, resources with relocation territories are always assigned to services within their relocation territories during the specified relocation dates. If they don't have a relocation territory, the primary territories are favored over the secondary.

Deleting Service Territories

You can't delete a service territory with service appointments. If you try to delete it, you're prompted to assign the appointments to a different territory.

If you delete a service territory with members, the resources who were members no longer have any connection to the territory.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To view service territories:

- "Read" on service territories

To create service territories:

- "Create" on service territories

To delete service territories:

- "Delete" on service territories

To assign service resources to service territories:

- "Edit" on service territories

Guidelines for Using Service Resources

Service resources are users who can perform field service work. Learn how to create and manage service resources.

Viewing Service Resources

View service resources on the Service Resources tab. In addition:

- Resources that are assigned to a service appointment appear in the Assigned Resources related list on the appointment detail page
- Resources that belong to a service territory appear in the Service Territory Members related list on the territory detail page

Creating Service Resources

Create service resources from the Service Resources tab. A user can have up to two associated service resource records if each record is a different Resource Type (Technician or Dispatcher)/

Assigning Service Resources to Service Appointments

Assign a resource to a service appointment via the Assigned Resources related list on the appointment detail page. If needed, you can modify the related list layout from the Assigned Resources node in Setup. You can assign multiple resources to an appointment.

Deactivating Service Resources

For tracking purposes, resources can only be deactivated, not deleted. To deactivate a user, deselect **Active** on their detail page.

Deactivating a user deactivates the related service resource. You can't create a service resource that is linked to an inactive user.

Viewing Service Resource Schedules

The Service Appointments related list shows all appointments that a resource is assigned to, while the Absences related list on a resource lets you define periods of time when a resource is unavailable to work. Unless you're using the Field Service Lightning managed package with the scheduling optimizer, resources can still be assigned appointments that conflict with their absences.



Tip: Create a trigger that sends an approval request to a supervisor when a resource creates an absence.

If you're not using the Field Service Lightning managed package, a calendar view isn't available for individual service resources.

Adding Preferred Service Resources to Accounts

See [Guidelines for Using Service Resources](#) on page 44.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To view service resources:

- "Read" on service resources

To create service resources:

- "Create" on service resources

To assign service resources to service appointments:

- "Edit" on service appointments AND "View" on service resources

To deactivate service resources:

- "Edit" on service resources

Guidelines for Using Work Orders

USER PERMISSIONS

To view the Work Orders tab, work orders, and work order line items:	"Read" on work orders
To create or clone work orders:	"Create" on work orders
To edit work orders:	"Edit" on work orders
To delete work orders:	"Delete" on work orders
To create, edit, and delete work order line items:	"Edit" on work orders

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Work orders help you track tasks to be performed on a product. Learn how to create and manage work orders.

Viewing Work Orders

Work orders can be associated with accounts, assets, cases, contacts, entitlements, service appointments, service contracts, and other work orders. View work orders on the Work Orders tab. The Work Orders related list on the following record detail pages also lists the work orders associated with a record:

- Accounts
- Assets
- Cases
- Contacts
- Entitlements
- Service contracts

 **Tip:** If your Salesforce admin has set up the console to include work orders, click the Console tab to view and edit work orders and their associated records in one place.

Creating Work Orders

You can create and edit work orders from the Work Orders tab or the Work Orders related list on supported objects. Depending on how work orders are set up in your organization, this related list may not be available on some records.

 **Tip:** When you create a work order, add *line items* to the work order via the Work Order Line Items related list. Work order line items represent specific tasks that a technician must perform to complete the work order. They can be marked as completed one by one, and make it easier to track and improve field service processes. Pricing details like discounts and unit price are set at the line item level on work orders.

Deleting Work Orders

Delete work orders on the work order's detail page or the Work Orders related list. Deleting a work order moves it to the Recycle Bin. Any notes, attachments, activities, line items, and service appointments associated with the work order are also deleted. If you undelete the work order, the associated items are undeleted.

Work Order and Work Order Line Item Status

Work orders and their line items have a status to track progress towards completing the tasks or activities.

Picklist Status	Status Category	Description
None	None	Default value
New	New	New work order, no activity has started
Canceled	Canceled	Work is canceled, typically before any work is started
In Progress	In Progress	Work has started
On Hold	On Hold	Temporary pause in work
Completed	Completed	Work completed successfully
Cannot Complete	Cannot Complete	Work couldn't be completed successfully
Closed	Closed	All work and associated activity is finished

Customizing Work Order Status Values

In orgs created during or after Winter '17, the default status values on both work orders and work order line items are automatically assigned to their corresponding status category. For example, the `New` status has a status category of `New`. However, if work orders were enabled in your org before Winter '17, existing status values have a status category of `None` which can't be updated. If you want to change the status category from `None` for an existing status value, a little housekeeping in Setup is necessary. These steps apply to status values on both work orders and work order line items.

Step	Example
<p>Step 1. Ensure you have all original seven status categories</p>	<p>If you have deleted or changed the original status values, recreate status until you have all seven:</p> <ul style="list-style-type: none"> • <code>New</code>—Work order was created, but there hasn't yet been any activity. • <code>In Progress</code>—Work has begun. • <code>On Hold</code>—Work is paused. • <code>Completed</code>—Work is complete. • <code>Cannot Complete</code>—Work could not be completed. • <code>Closed</code>—All work and associated activity is complete. • <code>Canceled</code>—Work is canceled, typically before any work began. <p> Note: Your default setup may have hidden status categories. You must also create new status values for those status categories.</p>
<p>Step 2. For each status value, create a new "dummy" status value with a modified name and an appropriate status category.</p>	<p>If you have a status value of <code>Completed</code>, create an additional status value with these settings:</p> <ul style="list-style-type: none"> • Name: <code>Completed_1</code> • Status Category: <code>Completed</code>

Step	Example
	 Note: Your default setup may have hidden status categories. You must also create new status values for those status categories.
Step 3. Edit the status category of the original status value that your dummy value was based on.	Edit the <code>Completed</code> status value so its status category is <code>Completed</code> .
Step 4. To keep things tidy, delete the dummy value.	Delete the <code>Completed_1</code> value that you created.

Parent and Child Work Orders

Child work orders are complete work orders. They are simply related to each other in hierarchy of parent and related child records. Use child work orders when you want to manage each one of them as individual entities. Child Work Orders can be scheduled, given statuses, and assigned. They can each have their own set of work order line items to describe the tasks required to perform the work. Cancellations are a common reason to use parent and child work orders. When work is canceled, you can use the work order status to indicate it's been canceled and create a new related child work order. This allows your company to track first-time rates and analyze cancellations reasons.

Sharing Work Orders

You may be able to grant extra access to work orders beyond what your org's default sharing model allows. However, you can't make the sharing model more restrictive than the default.

To see who has access to a work order, click **Sharing** on the work order's detail page. Work order line items inherit their parent work order's sharing settings.

To learn how to set up sharing rules to control work order sharing, see [Create Work Order Sharing Rules](#).

How Work Orders and Service Appointments Work Together

Service appointments on work orders and work order line items offer a more detailed view of the work being performed. While work orders and work order line items let you enter general information about a task, service appointments track the details about the site visits and work performed.

Service appointments have a parent record. Field Service Lightning is optimized to use work orders and work order line items as the parent records of Service Appointments. Work orders and work order line items provide important capabilities such as relationships to pricebooks and Salesforce Knowledge. The technician experience in the Field Service Lightning mobile app is also optimized for service appointments with work orders or work order line items as the parent record.

How Work Orders and Assets Work Together

Linking work orders to assets helps you track the work that is performed on the asset, whether it's installation, repair, or preventive maintenance. You can link a work order to an asset via the Work Orders related list on the asset detail page or the Asset lookup field on the work order. When you're linking work orders to assets, follow these guidelines:

- If a work order is related to a particular asset, link the work order to the asset in Salesforce so you can easily track the work.
- If a case is opened because a customer experiences a problem with an asset, you may need to create a work order to inspect or repair the asset. Link the work order to the case so the case owner can track its progress.
- If you need to track periodic standard maintenance on assets, link the related work order to the entitlement or service contract that accounts for the maintenance.

Reporting on Work Orders

Create custom report types to keep track of work orders in your org. For details, see [Create Field Service Lightning Reports](#).

 **Note:** You can also use the Object Milestones custom report type to view work orders with milestones in your org. The `Milestone Status` and `Milestone Status Icon` fields are not available in work order reports.

Attaching Knowledge Articles to Work Orders

You can attach Knowledge articles to work orders and work order line items so field technicians can quickly access product specs, instructions, and more. To learn more, see [Guidelines for Using Knowledge with Work Orders](#).

Guidelines for Using Service Appointments

A service appointment is an appointment for a field service technician to perform work for a customer. Learn how to create and manage service appointments.

Viewing Service Appointments

View service appointments on the Service Appointments tab. Service appointments also appear on several record detail pages:

- A service resource's assigned appointments appear in the Service Appointments related list on the resource detail page.
- A record's related service appointments appear in the Service Appointments related list on the record detail page. Accounts, assets, opportunities, work orders, and work order line items can have service appointments.

Creating Service Appointments

Create service appointments via the Service Appointments tab or from the Service Appointments related list on a supported record. You can't create service appointments from the Service Appointments related list on a service resource, but you can assign the resource to existing service appointments.

Deleting Service Appointments

You can delete a service appointment to indicate that it has been canceled. Deleting a record deletes its child service appointments.

Associating Service Appointments with Other Records

Service appointments always have a parent record, which can be a work order, work order line item, opportunity, account, or asset. The type of parent record tells you about the nature of the service appointment:

- Service appointments on *work orders* and *work order line items* offer a more detailed view of the work being performed. While work orders and work order line items let you enter general information about a task, service appointments are where you add the details about scheduling and ownership.
- Service appointments on *assets* represent work being performed on the asset.
- Service appointments on *accounts* represent work being performed for the account.
- Service appointments on *opportunities* represent work that is related to the opportunity.

For example, suppose you create a work order to track a customer's annual refrigerator maintenance. In the Service Appointments related list on the work order, you create an Annual Maintenance appointment.

During the appointment, the technician completes most of the maintenance but determines that a replacement part must be ordered and installed. The technician changes the appointment status to `Cannot Complete`, and a second service appointment is created on the work order to track the installation. When the second appointment is completed and it is determined that the fridge is fully repaired, the second appointment and the work order can then be closed. Easy as pie!

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To view service appointments:

- "Read" on service appointments

To create service appointments:

- "Create" on service appointments

To delete service appointments:

- "Delete" on service appointments

To assign service resources to service appointments:

- "Edit" on service appointment AND "View" on service resources

Guidelines for Using Knowledge with Work Orders

You can attach Knowledge articles to work orders and work order line items to help technicians in the field access important procedural info, guidelines, specs, and more.

Suggesting an Article

From the Field Service Settings page, you can set which fields on work orders and work order line items are used to suggest relevant articles.

1. From Setup enter *Field Service* in the Quick Find box, then select **Field Service Settings** under Field Service.
2. In the work order and work order line item field lists, select which fields you want the search engine to use when suggesting relevant articles from your knowledge base.
3. Click **Save**.

Attaching an Article

You can attach an article to a work order or work order line item in two ways:

- Navigate to the record to which you want to attach the article. In the Knowledge One widget in the console, search for an article. In the article's action menu, click **Attach to Work Order** or **Attach to Work Order Line Item**.
- Navigate to the record to which you want to attach the article. In the Articles related list, click **Find Articles**. Use the search to locate your article, then click **Attach to Work Order** or **Attach to Work Order Line Item** in the article's action menu.

Viewing an Attached Article

Articles attached to a work order or work order line item appear in the Knowledge One widget and the Articles related list on the record. View an article by clicking its title. You can also navigate to attached articles from the feed of a work order or work order line item if feed tracking for related lists is enabled.

On article detail pages, the Linked Work Orders and Linked Work Order Line Items related lists show which records an article is attached to.

Detaching an Article

You can detach an article from a work order or work order line item in two ways:

- Navigate to the record that the article is attached to. In the Knowledge One widget in the console, click **Detach from Work Order** or **Detach from Work Order Line Item** in the article's action menu.
- Navigate to the record that the article is attached to. In the Articles related list, click **Detach** next to the article.

Updating an Attached Article

If an article is out of date, you can publish a new version by navigating to the article and clicking **Edit**.

When you attach an article to a record, that version of the article stays associated with the record even if later versions are published. If needed, you can detach and reattach an article to a record to ensure that the record is linked to the latest version of the article. The `Linked Article Version` field on the linked article detail page leads to the attached version.

Managing Linked Articles

Customize linked articles' page layouts, fields, validation rules, and more from the Linked Articles node in Setup under Knowledge.

To learn how to configure your console and page layouts so articles can be attached to work orders and work order line items, see [Set Up Work Orders](#).

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To attach or detach an article on a work order or work order line item:

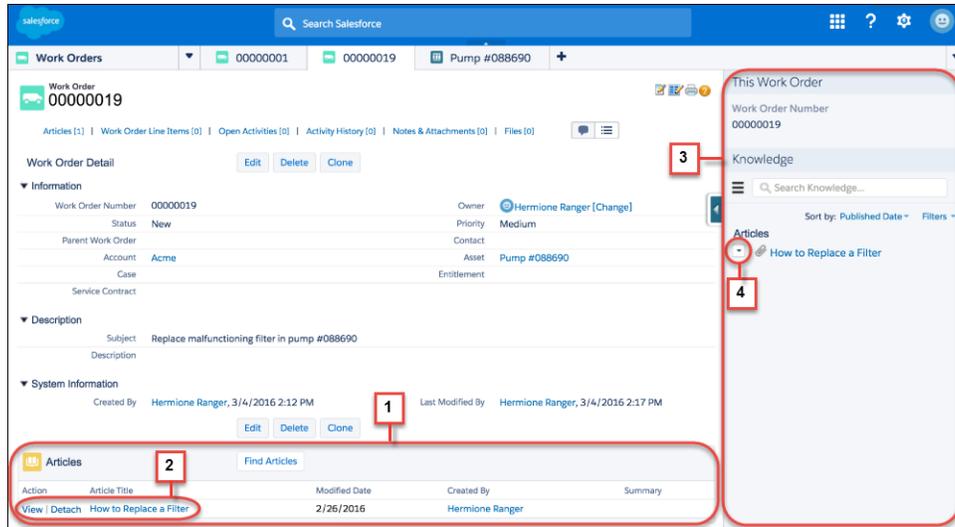
- "Read" on work orders AND "Read" on the article type AND Knowledge enabled

To edit page layouts:

- "Customize Application"

To edit console layouts:

- "Customize Application" AND "Service Cloud User"



- (1) View and change the articles attached to a record from the Articles related list.
- (2) View an article’s properties by clicking **View**, or view the article itself by clicking its title. Click **Detach** to remove the article from the record.
- (3) The Knowledge One widget in the console sidebar lets you manage attached articles, view suggested articles, and search the Knowledge base.
- (4) Each article’s action menu contains the option to attach or detach it.

 **Warning:**

- The Article widget and Feed Articles Tool aren’t available in the feed view.
- Quick actions and global actions aren’t supported for linked articles.
- In the Article Toolbar on the Knowledge home page, you can’t attach an article to a work order or work order line item.
- The Linked Work Orders and Linked Work Order Line Items related lists on articles aren’t available in Lightning Experience or Salesforce1.
- Linked articles are view-only in Lightning Experience and Salesforce1.
- In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic. In Salesforce1, linked articles can’t be accessed from feed items.

FIELD SERVICE LIGHTNING OBJECT FIELDS

Learn about the fields available on Field Service Lightning standard objects.

[Service Territory Fields](#)

Service territories and service territory members have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Operating Hours Fields](#)

Operating hours and time slots have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Service Resource Fields](#)

Service resources and their related objects have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Skill Fields for Field Service](#)

Skills represent certifications and areas of expertise in your field service workforce. Skills and their related objects have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Work Order Fields](#)

Work orders have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Work Order Line Item Fields](#)

Work order line items have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Work Type Fields](#)

Work types have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Location Fields](#)

Locations, Addresses, and Associated Locations have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Parts and Van Stock Fields](#)

Product Items, Products Required, Products Consumed, and Product Item Transactions have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Service Appointment Fields](#)

Service appointments have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Customer Service Report Fields](#)

Service Reports can have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Linked Article Fields](#)

A linked article is a Knowledge article that is attached to a work order or work order line item. Linked articles have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Service Territory Fields

Service territories and service territory members have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Service territories represent regions in which field service work can be performed. They have the following fields.

Field Name	Description
Active	Indicates whether the service territory is meant to be used. If a territory is inactive, you can't add members to it or link it to work orders, work order line items, or service appointments.
Address	An address to associate with the territory. You may want to list the address of the territory's headquarters.
Description	The description of the territory.
Name	The name of the territory.
Operating Hours	The territory's operating hours, which indicate when service appointments within the territory should occur. Service resources who are members of a territory automatically inherit the territory's operating hours unless different hours are specified on the service territory member record.
Parent Territory	The territory's parent service territory, if it has one. For example, a <i>Northern California</i> territory can have a <i>State of California</i> territory as its parent.
Top-Level Territory	(Read only) The top-level territory in a hierarchy of service territories. Depending on where a territory lies in the hierarchy, its top-level territory might be the same as its parent.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Service territory members are service resources who are available to work in the service territory. They have the following fields.

Field Name	Description
Address	The member's address. You may want to list the related service resource's address in this field.
End Date	The date when the service resource is no longer a member of the territory. If the resource will be working in the territory for the foreseeable future, leave this field blank. This field is mainly useful for indicating when a temporary relocation ends.

Field Name	Description
Member Number	(Read only) An auto-generated number identifying the service territory member.
Operating Hours	The member's operating hours, which are inherited from the service territory.
Service Resource	The service resource assigned to the service territory.
Service Territory	The service territory that the service resource is assigned to.
Start Date	The date when the service resource becomes a member of the service territory.
Territory Type	<p>Primary, Secondary, or Relocation.</p> <ul style="list-style-type: none"> • The primary territory is typically the territory where the resource works most often—for example, near their home base. Service resources can only have one primary territory. • Secondary territories are territories where the resource can be assigned to appointments if needed. Service resources can have multiple secondary territories. • Relocation territories represent temporary moves for service resources. If you're using the Field Service Lightning managed package with the scheduling optimizer, resources with relocation territories are always assigned to services within their relocation territories during the specified relocation dates; if they don't have a relocation territory, the primary territories are favored over the secondary. <p>For example, a service resource might have the following territories:</p> <ul style="list-style-type: none"> • Primary territory: <i>West Chicago</i> • Secondary territories: <ul style="list-style-type: none"> – <i>East Chicago</i> – <i>South Chicago</i> • Relocation territory: <i>Manhattan</i>, for a three-month period

Operating Hours Fields

Operating hours and time slots have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Operating hours can be assigned to service territories, service territory members, and accounts to indicate when they are available for field service work. Create operating hours via the Operating Hours tab in Salesforce. Operating hours have the following fields.

Field Name	Description
Description	The description of the operating hours. Add any details that aren't included in the name.
Name	The name of the operating hours. For example: <i>Summer Hours, Winter Hours, Peak Season Hours.</i>
Time Zone	The time zone that the operating hours fall within.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Time slots represent a time period within a day when field service work can be completed. After you create operating hours, create time slots for each day via the Time Slots related list. Time slots have the following fields.

Field Name	Description
Day of Week	The day of the week when the time slot takes place.
End Time	The time when the time slot ends.
Name	The name of the time slot. The name is auto-populated to a day and time format—for example, <i>Monday 9:00 AM - 10:00 PM</i> —but you can manually update it if you wish.
Operating Hours	The operating hours that the time slot belongs to. An operating hours' time slots appear in the Operating Hours related list.
Start Time	The time when the time slot starts.
Type	The type of time slot. Possible values are <i>Normal</i> and <i>Extended</i> . You may choose to use <i>Extended</i> to represent overtime shifts.

 **Note:** You can't create custom fields on operating hours or time slots.

Service Resource Fields

Service resources and their related objects have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Service resources are users who can complete field service work. They have the following fields.

Field Name	Description
Active	When selected, this option means that the resource can be assigned to work orders. For service tracking purposes, resources can't be deleted, so deactivating a resource is the best way to send them into retirement.
Capacity-Based	Capacity-based resources are limited to a certain number of hours or appointments in a specified time period.  Tip: The Capacities related list shows a resource's capacity.
Description	The description of the resource.
Include in Scheduling Optimization	When selected, this option means that the service scheduling optimizer can assign this resource to work orders during the optimization process. Use only if the Field Service Lightning managed package is installed. Only users with the "Field Service Scheduling" permission set license can be included in scheduling optimization.
Name	The resource's name. You'll likely want this to be the name or title of the associated user.
Resource Type	Indicates whether a resource is a technician or a dispatcher. Resources who are dispatchers can't be capacity-based or included in scheduling optimization. Only users with the "Field Service Dispatcher" permission set license can be dispatchers.  Note: You can't add additional resource types.
User	The associated user.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Resource absences are periods of time in which a service resource isn't available to work. They have the following fields.

Field Name	Description
Absence ID	(Read only) An auto-generated number identifying the absence.
Absence Type	The type of absence: <i>Meeting, Training, Medical, or Vacation</i> . You can add custom values if needed.
Address	The address associated with the absence.
Description	The description of the absence.
End Time	The date and time when the absence ends.
Resource Name	The absent service resource.
Start Time	The date and time when the absence begins.

A service resource's *capacity* indicates how much work the resource can perform in a specified time period. Capacity records have the following fields.

Field Name	Description
End Date	The date the capacity ends; for example, the end date of a contract.
Name	(Read only) An auto-generated number identifying the capacity record.
Hours per Time Period	The number of hours that the resource can work per time period.
Service Resource	The associated resource.
Start Date	The date the capacity goes into effect.
Time Period	Days, Hours, or Months. For example, if a resource can work 80 hours per month, the capacity's <i>Time Period</i> would be <i>Month</i> and <i>Hours per Time Period</i> would be <i>80</i> .
Work Items per Time Period	The total number of service appointments that the resource can complete per time period.

Skill Fields for Field Service

Skills represent certifications and areas of expertise in your field service workforce. Skills and their related objects have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Skills represent a certification or area of expertise. They are created in Setup, and have the following fields.

Field Name	Description
Name	The name of the skill.
Description	The description of the skill.

EDITIONS

Available in: **Salesforce Classic and Lightning Experience**

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

Field Name	Description
Developer Name	The unique name of the skill in the API.

 **Note:** When you create a skill, leave the “Assign Users” and “Assign Profiles” sections blank. They are specific to Live Agent, which also uses skills.

Service resource skills are a skill that is assigned to a service resource. They appear in the Skills related list on service resource detail pages, and have the following fields.

Field Name	Description
End Date	The date when the skill expires. For example, if a resource must be re-certified after six months, the end date would be the date their certification expires.
Service Resource	The resource who possesses the skill.
Skill	The skill the resource possesses.
Skill Level	The resource’s skill level. Skill level can range from zero to 99.99. For tips on how to define skill level, see Configure Skill Settings on page 15.
Start Date	The date when the resource gains the skill. For example, if the skill represents a certification, the start date would be the date of certification.

Skill requirements are skills that a resource needs to complete a task. They appear in the Skill Requirements related list on work type, work order, and work order line item detail pages, and have the following fields.

Field Name	Description
Related Record	The work order, work order line item, or work type that the skill is required on.
Skill	The required skill.
Skill Level	The required skill level. Skill level can range from zero to 99.99.

Work Order Fields

Work orders have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Account	The account associated with the work order.
Address	The compound form of the address where the work order is completed. The work order inherits its address from the associated account. The work order's service appointments and line items inherit its address, though the address on line items can be updated.
Asset	The asset associated with the work order.
Business Hours	The business hours associated with the work order.
Case	The case associated with the work order.
City	The city where the work order is completed. Maximum length is 40 characters.
Contact	The contact associated with the work order.
Country	The country where the work order is completed. Maximum length is 80 characters.
Currency ISO Code	The ISO code for any currency allowed by the organization. Available only for orgs with the multicurrency feature enabled.
Description	The description of the work order. We recommend describing the steps a user must complete to mark the work order <i>Completed</i> .
Discount	(Read Only) The weighted average of the discounts on all line items on the work order. It can be any positive number up to 100.
Duration	The estimated time required to complete the work order. Specify the duration unit in the <code>Duration Type</code> field.
Duration Type	The unit of the duration: Minutes or Hours.
End Date	The date when the work order is completed. This field is blank unless you set up automation to configure it. For a sample workflow rule that configures the <code>Start Date</code> field (a similar field), see below.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

Field	Description
Entitlement	The entitlement associated with the work order.
Entitlement Process End Time	The time the work order exits an entitlement process. If an entitlement process applies to a work order, this field appears.
Entitlement Process Start Time	The time the work order entered an entitlement process. If an entitlement process applies to a work order, this field appears.
Geocode Accuracy	The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
Grand Total	(Read Only) The total price of the work order with tax added.
Is Closed	Indicates whether the work order is closed.  Tip: Use this field to report on closed versus open work orders.
Last Modified Date	The date when the work order was last modified.
Last Viewed Date	The date when the work order was last viewed.
Latitude	Used with <code>Longitude</code> to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between -90 and 90 with up to 15 decimal places.
Line Items	(Read Only) The number of work order line items on the work order.
Longitude	Used with <code>Latitude</code> to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between -180 and 180 with up to 15 decimal places.
Milestone Status	A milestone is a step in an entitlement process. It can have one of three statuses: Compliant, Open Violation, and Closed Violation. If an entitlement process applies to a work order, this field appears. To learn more, see Milestone Statuses .
Milestone Status Icon	An icon that corresponds to the milestone status. <ul style="list-style-type: none"> •  Compliant •  Open Violation •  Closed Violation
Owner	The work order's assigned owner.
Parent Work Order	The work order's parent work order, if it has one.  Tip: View, create, and delete a work order's child work orders in the Child Work Orders related list.
Postal Code	The postal code where the work order is completed. Maximum length is 20 characters.

Field	Description
Price Book	The price book associated with the work order. Adding a price book to the work order lets you assign different price book entries (products) to the work order's line items. This field is only available if products are enabled.
Priority	The priority of the work order. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • <i>Low</i> • <i>Medium</i> • <i>High</i> • <i>Critical</i>
Root Work Order	(Read Only) The top-level work order in a work order hierarchy. Depending on where a work order lies in the hierarchy, its root might be the same as its parent.
Service Contract	The service contract associated with the work order.
Service Territory	The service territory where the work order is taking place.
Start Date	The date when the work order goes into effect. This field is blank unless you set up automation to populate it. For a sample workflow rule that configures this field, see below.
State	The state where the work order is completed. Maximum length is 80 characters.
Status	The status of the work order. The picklist includes the following values, which can be customized : <ul style="list-style-type: none"> • <i>New</i>—Work order was created, but there hasn't yet been any activity. • <i>In Progress</i>—Work has begun. • <i>On Hold</i>—Work is paused. • <i>Completed</i>—Work is complete. • <i>Cannot Complete</i>—Work could not be completed. • <i>Closed</i>—All work and associated activity is complete. • <i>Canceled</i>—Work is canceled, typically before any work began. <p>Changing a work order's status does not affect the status of its work order line items or associated service appointments.</p>
Status Category	The category that each status value falls into. The Status Category field has eight default values: seven values which are identical to the default <code>Status</code> values, and a <code>None</code> value for statuses without a status category. <p>If you create custom <code>Status</code> values, you must indicate which category it belongs to. For example, if you create a <code>Waiting</code></p>

Field	Description
	<p>for <code>Response</code> value, you may decide that it belongs in the <code>On Hold</code> category.</p> <p>The <code>Status Category</code> field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.</p>
Street	The street number and name where the work order is completed.
Subject	The subject of the work order. Try to describe the nature and purpose of the job to be completed. For example, "Annual on-site well maintenance." The maximum length is 255 characters.
Subtotal	(Read Only) The total of the work order line items' subtotals before discounts and taxes are applied.
Tax	The total tax on the work order. For example, in a work order whose total price is \$100, enter \$10 to apply a 10 percent tax. You can enter a number with or without the currency symbol and you can use up to two decimal places.
Total Price	(Read Only) The total of the work order line items' price after discounts but before tax is added.
Work Order Number	An auto-generated number that identifies the work order.
Work Type	The work type associated with the work order. When a work type is selected, the work order automatically inherits the work type's <code>Duration</code> , <code>Duration Type</code> , and required skills.



Example: The `Start Date` and `End Date` fields are blank by default, but you can set up workflow rules to configure them. The following rule populates the `Start Date` field with the current date and time when the `Status` field is changed to `In Progress`:

- Create a workflow rule on the Work Order object:
 - Under Evaluation criteria, select **Created**.
 - Under Rule Criteria, enter `Work Order: Status EQUALS In Progress`.
- Add a New Field Update workflow action:
 - Under Field to Update, select **Start Date**.
 - Under Date Options, select the option to use a formula and enter the formula `NOW()`.
- Save and activate your rule.

Work Order Line Item Fields

Work order line items have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Address	The address of the line item. The line item inherits its address from its parent work order, but it can also be updated manually.
Asset	The asset associated with the line item. If your org uses hierarchical assets (available after Spring '16), you may want to link a work order's line items with different assets. For this reason, line items do not automatically inherit their parent work order's asset value.
Currency ISO Code	The ISO code for any currency allowed by the organization. Available only for orgs with the multicurrency feature enabled.
Description	The description of the line item. We recommend describing the steps a user must follow to mark the line item <i>Completed</i> .
Discount	The percent discount to be applied to the line item. You can enter a number with or without the percent symbol and you can use up to two decimal places.
Duration	The estimated time required to complete the line item. Specify the duration unit in the <code>Duration Type</code> field.
Duration Type	The unit of the duration: Minutes or Hours.
End Date	The date when the line item is completed.
Geocode Accuracy	The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
Is Closed	Indicates whether the line item has been closed. Changing the line item's status to <code>Closed</code> causes this checkbox to be selected in the user interface.
Latitude	Used with <code>Longitude</code> to specify the precise geolocation of the address where the work order

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

Field	Description
	is completed. Acceptable values are numbers between -90 and 90 with up to 15 decimal places.
Line Item Number	An auto-generated number that identifies the line item.
List Price	The price of the line item (product) as listed in its corresponding price book entry. If a product isn't specified, the list price defaults to zero. (Read only)
Longitude	Used with <code>Latitude</code> to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between -180 and 180 with up to 15 decimal places.
Order	The order associated with the line item. For example, you may need to order replacement parts before you can complete the line item.
Parent Work Order Line Item	The line item's parent line item, if it has one.  Tip: View, create, and delete a line item's child line items in the Child Work Order Line Items related list.
Priority	The priority of the work order. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • <i>Low</i> • <i>Medium</i> • <i>High</i> • <i>Critical</i>
Product	The product (price book entry) associated with the line item. This field's lookup search only returns products that are included in the work order's price book.
Quantity	The line item's quantity.
Root Work Order Line Item	The top-level line item in a line item hierarchy. Depending on where a line item lies in the hierarchy, its root might be the same as its parent. (Read only)
Service Territory	The service territory where the line item work is taking place.
Start Date	The date when the line item goes into effect.
Status	The status of the line item. The picklist includes the following values, which can be customized : <ul style="list-style-type: none"> • <i>New</i>—Line item was created, but there hasn't yet been any activity. • <i>In Progress</i>—Work has begun. • <i>On Hold</i>—Work is paused. • <i>Completed</i>—Work is complete.

Field	Description
	<ul style="list-style-type: none"> • <code>Cannot Complete</code>—Work could not be completed. • <code>Closed</code>—All work and associated activity is complete. • <code>Canceled</code>—Work is canceled, typically before any work began.
<code>Status Category</code>	<p>The category that each status value falls into. The <code>Status Category</code> field has eight default values: seven values which are identical to the default <code>Status</code> values, and a <code>None</code> value for statuses without a status category.</p> <p>If you create custom <code>Status</code> values, you must indicate which category it belongs to. For example, if you create a <code>Waiting for Response</code> value, you may decide that it belongs in the <code>On Hold</code> category.</p> <p>The <code>Status Category</code> field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.</p>
<code>Subject</code>	The line item's subject. For example, "Tire Check."
<code>Subtotal</code>	The line item's unit price multiplied by the quantity. (Read only)
<code>Total Price</code>	The line item's subtotal with discounts applied. (Read only)
<code>Unit Price</code>	By default, the unit price for a line item is the product's list price from the price book, but you can change it.
<code>Work Order</code>	The parent work order of the line item. Because work order line items must be associated with a work order, this field is required.
<code>Work Order Line Item Number</code>	An auto-generated number that identifies the work order line item.
<code>Work Type</code>	The work type associated with the line item. When a work type is selected, the work order line item automatically inherits the work type's <code>Duration</code> , <code>Duration Type</code> , and required skills.

Work Type Fields

Work types have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field Name	Description
Description	The description of the work type. Try to add details about the task or tasks that this work type represents.
Duration Type	The unit of the Estimated Duration: Minutes or Hours.
Estimated Duration	The estimated length of the work. The estimated duration is in minutes or hours based on the value selected in the Duration Type field.
Name	The name of the work type. Try to use a name that helps users quickly understand the type of work orders that can be created from the work type. For example, "Annual Refrigerator Maintenance" or "Valve Replacement."

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Location Fields

Locations, Addresses, and Associated Locations have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Locations

Field Service Locations can be associated with Products Items to track quantities at the location. They have the following fields.

Field Name	Description
Close Date	Date the location closed, went out of service
Construction End Date	Date construction ended at the location
Construction Start Date	Date construction began at the location
Description	A brief description of the location
Driving Directions	Directions to the location
Inventory Location	Identifies if the location stores parts  Note: This field must be present and checked to associate the location with product items.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Field Name	Description
Location	The geographic location
Location Type	Picklist of location types, the values are: <ul style="list-style-type: none"> • Warehouse <i>default</i> • Site • Van • Plant
Mobile Location	Identifies if the location moves, for example a truck or tool box.
Name	Location name
Open Date	Date the location opened, came into service
Owner Name	The location's owner or driver
Parent Location	The location's parent location, for example if vans are stored at a warehouse when not in service, the warehouse is the parent location
Owner Name	The location's owner or driver
Possession Date	The date the location was purchased
Remodel End Date	Date construction ended at the location
Remodel Start Date	Date construction ended at the location
Time Zone	Picklist of available time zones
Vistor Address	Lookup to an account's or client's address

Addresses

Addresses allow you to set up multiple addresses and address types. They have the following fields.

Field Name	Description
Address	Name for the address
Address Type	Picklist of address types, the values are: <ul style="list-style-type: none"> • Mailing • Shipping • Billing • Home
Description	A brief description of the address
Driving Directions	Directions to the address

Field Name	Description
Location Type	Picklist of location types, the values are: <ul style="list-style-type: none"> Warehouse <i>default</i> Site Van Plant
Parent	A lookup field to the parent address, for example if the billing address might be the parent warehouse addresses
Time Zone	Picklist of available time zones

Associated Locations

Associated locations allow you to set up associate multiple accounts with one location. They have the following fields.

Field Name	Description
Active From	Date and time the associated location is active
Active To	Date and time the associated location is inactive
Created By	(Read Only) User who created the associated location
Created Date	(Read Only) Date the associated location was created
Last Modified By	(Read Only) User who modified the associated location last
Last Modified Date	(Read Only) Date the associated location was last modified
Location	A lookup field to a the associated location
Name	Auto-generated number for the association
Parent Record	A lookup field to the parent account.
Type	Picklist of address types, the values are: <ul style="list-style-type: none"> Bill To Ship To

Parts and Van Stock Fields

Product Items, Products Required, Products Consumed, and Product Item Transactions have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Product Items

Product Items are products associated with a location. They have the following fields.

Field Name	Description
Created By	(Read Only) User who created the product item
Created Date	(Read Only) Date the product item was created
Last Modified By	(Read Only) User who modified the product item last
Last Modified Date	(Read Only) Date the product item was last modified
Location	Location associated with the product item
Owner	The product item's owner
Product Item Number	(Read Only) Auto-generated number identifying the product item.
Product Name	Product associated with the product item
Quantity On Hand	The amount at the location  Note: To add a serial number this value must be 1.
Quantity Unit of Measure	Units of the product item, for example, grams, liters, or units.
Serial Number	A unique number for identification purposes.  Note: To enter a serial number, quantity on hand must be 1.

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Products Required

Products Required is a related list of products required for a work order or work order line item. It has the following fields.

Field Name	Description
Created By	(Read Only) User who created the required product
Created Date	(Read Only) Date the required product was created

Field Name	Description
Last Modified By	(Read Only) User who modified the required product last
Last Modified Date	(Read Only) Date the required product was last modified
Parent Record	Associated work order or work order line item.
Parent Record Type	Identifies if the parent record is a work order or a work order line item.
Product Required	Name of the required product
Quantity Required	Amount required of the product
Quantity Unit of Measure	Units of the required product, for example, grams, liters, or units.

Products Consumed

Products Consumed is a related list of products consumed for a work order or work order line item. It has the following fields.

Field Name	Description
Created By	(Read Only) User who created the consumed product
Created Date	(Read Only) Date the consumed product was created
Description	A description of the consumed product
Last Modified By	(Read Only) User who modified the consumed product last
Last Modified Date	(Read Only) Date the consumed product was last modified
Price Book Entry	Price book associated with the consumed product
Product	Product associated with the consumed product
Product Consumed Number	(Read Only) Auto-generated number identifying the consumed product.
Product Item	Product item associated with the consumed product
Quantity Consumed	The amount of consumed product
Quantity Unit of Measure	Units of the consumed item, for example, grams, liters, or units.
Unit Price	The price per unit of the consumed product
Work Order	Work order associated with the consumed product
Work Order Line Item	Work order line item associated with the consumed product

Product Item Transactions

Product Item Transactions is a related list of actions taken on the product item. It has the following fields.

Field Name	Description
Created By	(Read Only) User who created the product item transaction
Created Date	(Read Only) Date the product item transaction was created
Description	A description of the transaction
Last Modified By	(Read Only) User who modified the product item transaction last
Last Modified Date	(Read Only) Date the product item transaction was last modified
Product Item	
Product Item Transaction Number	(Read Only) Auto-generated number identifying the product item transaction.
Quantity	Amount consumed
Related Record	Work order or work order line item associate with the consumed product
Transaction Type	<ul style="list-style-type: none"> • Replenished: When the quantity of the part is stocked at its location. • Consumed: When parts are consumed to complete a work order or work order line item. The technician updates the products consumed related list on the work order or work order line item. • Adjusted: When there is a discrepancy. Adjustments are made by editing the product item quantity on hand.

Service Appointment Fields

Service appointments have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field Name	Description
Account	(Read only) The account associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent. Otherwise, it remains blank.
Actual Duration (Minutes)	The number of minutes that it took the resource to complete the appointment after arriving at the address. When values are first added to the Actual Start and Actual End fields, the Actual Duration is automatically populated to list the difference between the Actual Start and Actual End. If the

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Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Field Name	Description
	<code>Actual Start</code> and <code>Actual End</code> fields are subsequently updated, the <code>Actual Duration</code> field doesn't re-update, but you can manually update it.
<code>Actual End</code>	The actual date and time the appointment ended.
<code>Actual Start</code>	The actual date and time the appointment started.
<code>Address</code>	The address where the appointment is taking place. The address is inherited from the parent record if the parent record lists an address.
<code>Appointment Number</code>	An auto-assigned number that identifies the appointment.
<code>Arrival Window End</code>	The end of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the <code>Scheduled Start</code> and <code>End</code> window to allow time for delays and scheduling changes. You may choose to share the <code>Arrival Window Start</code> and <code>End</code> with the customer, but keep the <code>Scheduled Start</code> and <code>End</code> internal-only.
<code>Arrival Window Start</code>	The beginning of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the <code>Scheduled Start</code> and <code>End</code> window to allow time for delays and scheduling changes. You may choose to share the <code>Arrival Window Start</code> and <code>End</code> with the customer, but keep the <code>Scheduled Start</code> and <code>End</code> internal-only.
<code>Contact</code>	The contact associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent.
<code>Description</code>	The description of the appointment.
<code>Due Date</code>	The date by which the appointment must be completed. <code>Earliest Start Permitted</code> and <code>Due Date</code> typically reflect terms in the customer's service-level agreement.
<code>Duration</code>	The estimated length of the appointment. If the parent record is work order or work order line item, the appointment inherits its parent's duration, but it can be manually updated. The duration is in minutes or hours based on the value selected in the <code>Duration Type</code> field.
<code>Duration Type</code>	The unit of the duration: Minutes or Hours.
<code>Earliest Start Permitted</code>	The date after which the appointment must be completed. <code>Earliest Start Permitted</code> and <code>Due Date</code> typically reflect terms in the customer's service-level agreement.
<code>Parent Record</code>	The parent record associated with the appointment.

Field Name	Description
Parent Record Status Category	(Read only) The Status Category of the parent record. If the parent record is a work order or work order line item, this field is populated; otherwise, it remains blank.
Parent Record Type	(Read only) The type of parent record: Account, Asset, Opportunity, Work Order, or Work Order Line Item.
Scheduled End	The time at which the appointment is scheduled to end. If you are using the Field Service Lightning managed package with the scheduling optimizer, this field is populated once the appointment is assigned to a resource. $Scheduled\ End - Scheduled\ Start = Estimated\ Duration$.
Scheduled Start	The time at which the appointment is scheduled to start. If you are using the Field Service Lightning managed package with the scheduling optimizer, this field is populated once the appointment is assigned to a resource.
Service Territory	The service territory associated with the appointment. If the parent record is a work order or work order line item, the appointment inherits its parent's service territory.
Status	The status of the appointment. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • None—Default value. • Not Scheduled—The service appointment isn't scheduled. • Scheduled—The service appointment is scheduled. • Dispatched—The service resource is in route.. • In Progress—The service resource started work. • Completed—The service resource completed work. • Canceled—The service appointment has been canceled. • Missed—The service resource didn't make it to the location. • Running Long—The service resource started the job but didn't complete it by the scheduled end time. • LateThe service resource didn't start the job by the scheduled start time.
Status Category	The category that each <code>Status</code> value falls into. The <code>Status Category</code> field has seven values which are identical to the default <code>Status</code> values. If you create custom <code>Status</code> values, you must indicate which category it belongs to. For example, if you create a <code>Customer Absent</code> value, you may decide that it belongs in the <code>Missed</code> category.

Field Name	Description
	The <code>Status Category</code> field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.
Subject	A short phrase describing the appointment.

Customer Service Report Fields

Service Reports can have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

- [Work Order Customer Report Fields](#)
- [Work Order Line Item Customer Report Fields](#)
- [Service Appointment Customer Report Fields](#)

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Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Work Order Customer Report Fields

Field	Description
Account	The account associated with the work order.
Address	The compound form of the address where the work order is completed. The work order inherits its address from the associated account. The work order's service appointments and line items inherit its address, though the address on line items can be updated.
Asset	The asset associated with the work order.
Business Hours	The business hours associated with the work order.
Case	The case associated with the work order.
Contact	The contact associated with the work order.
Created By	User who created the work order.
Created Date	Date the work order was created.
Description	The description of the work order. We recommend describing the steps a user must complete to mark the work order <i>Completed</i> .

Field	Description
Discount	The weighted average of the discounts on all line items on the work order. It can be any positive number up to 100.
Duration	The estimated time required to complete the work order. Specify the duration unit in the <code>Duration Type</code> field.
Duration Type	The unit of the duration: Minutes or Hours.
End Date	The date when the work order is completed. This field is blank unless you set up automation to configure it. For a sample workflow rule that configures the <code>Start Date</code> field (a similar field), see below.
Grand Total	The total price of the work order with tax added.
Is Closed	Indicates whether the work order is closed.  Tip: Use this field to report on closed versus open work orders.
Last Modified By	The user who modified the work order last.
Last Modified Date	The date when the work order was last modified.
Line Items	The number of work order line items on the work order.
Location	Location associated with the work order.
Owner	The work order's assigned owner.
Parent Work Order	The work order's parent work order, if it has one.  Tip: View, create, and delete a work order's child work orders in the Child Work Orders related list.
Price Book	The price book associated with the work order. Adding a price book to the work order lets you assign different price book entries (products) to the work order's line items. This field is only available if products are enabled.
Priority	The priority of the work order. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • <i>Low</i> • <i>Medium</i> • <i>High</i> • <i>Critical</i>
Root Work Order	The top-level work order in a work order hierarchy. Depending on where a work order lies in the hierarchy, its root might be the same as its parent.
Service Appointment Count	The number for service appointments to date for this work order.

Field	Description
Service Appointment (Create Date)	The date the service appointment was created or scheduled.
Service Territory	The service territory where the work order is taking place.
Start Date	The date when the work order goes into effect. This field is blank unless you set up automation to populate it. For a sample workflow rule that configures this field, see below.
Status	<p>The status of the work order. The picklist includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • <i>New</i>—Work order was created, but there hasn't yet been any activity. • <i>In Progress</i>—Work has begun. • <i>On Hold</i>—Work is paused. • <i>Completed</i>—Work is complete. • <i>Cannot Complete</i>—Work could not be completed. • <i>Closed</i>—All work and associated activity is complete. • <i>Canceled</i>—Work is canceled, typically before any work began. <p>Changing a work order's status does not affect the status of its work order line items or associated service appointments.</p>
Status Category	<p>The category that each status value falls into. The Status Category field has eight default values: seven values which are identical to the default <code>Status</code> values, and a <code>None</code> value for statuses without a status category.</p> <p>If you create custom <code>Status</code> values, you must indicate which category it belongs to. For example, if you create a <code>Waiting for Response</code> value, you may decide that it belongs in the <code>On Hold</code> category.</p> <p>The <code>Status Category</code> field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.</p>
Subject	The subject of the work order. Try to describe the nature and purpose of the job to be completed. For example, "Annual on-site well maintenance." The maximum length is 255 characters.
Subtotal	The total of the work order line items' subtotals before discounts and taxes are applied.
Tax	The total tax on the work order. For example, in a work order whose total price is \$100, enter \$10 to apply a 10 percent tax. You can enter a number with or without the currency symbol and you can use up to two decimal places.

Field	Description
Total Price	The total of the work order line items' price after discounts but before tax is added.
Work Order Number	An auto-generated number that identifies the work order.
Work Type	The work type associated with the work order. When a work type is selected, the work order automatically inherits the work type's Duration, Duration Type, and required skills.

Work Order Line Item Customer Report Fields

Field	Description
Address	The address of the line item. The line item inherits its address from its parent work order, but it can also be updated manually.
Asset	The asset associated with the line item. If your org uses hierarchical assets (available after Spring '16), you may want to link a work order's line items with different assets. For this reason, line items do not automatically inherit their parent work order's asset value.
Created By	User who created the work order line item.
Created Date	Date the work order line item was created.
Description	The description of the line item. We recommend describing the steps a user must follow to mark the line item <i>Completed</i> .
Discount	The percent discount to be applied to the line item. You can enter a number with or without the percent symbol and you can use up to two decimal places.
Duration	The estimated time required to complete the line item. Specify the duration unit in the Duration Type field.
Duration Type	The unit of the duration: Minutes or Hours.
End Date	The date when the line item is completed.
Is Closed	Indicates whether the line item has been closed. Changing the line item's status to <i>Closed</i> causes this checkbox to be selected in the user interface.
Last Modified By	The user who modified the work order line item last.
Last Modified Date	The date when the work order line item was last modified.
List Price	The price of the line item (product) as listed in its corresponding price book entry. If a product isn't specified, the list price defaults to zero.

Field	Description
Location	Location associated with the work order line item.
Order	The order associated with the line item. For example, you may need to order replacement parts before you can complete the line item.
Parent Work Order Line Item	The line item's parent line item, if it has one.  Tip: View, create, and delete a line item's child line items in the Child Work Order Line Items related list.
Priority	The priority of the work order. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • <i>Low</i> • <i>Medium</i> • <i>High</i> • <i>Critical</i>
Product	The product (price book entry) associated with the line item. This field's lookup search only returns products that are included in the work order's price book.
Quantity	The line item's quantity.
Root Work Order Line Item	The top-level line item in a line item hierarchy. Depending on where a line item lies in the hierarchy, its root might be the same as its parent.
Service Appointment Count	The number for service appointments to date for this work order.
Service Report (Create Date)	The date the service appointment was created or scheduled.
Service Territory	The service territory where the line item work is taking place.
Start Date	The date when the line item goes into effect.
Status	The status of the line item. The picklist includes the following values, which can be customized : <ul style="list-style-type: none"> • New—Line item was created, but there hasn't yet been any activity. • In Progress—Work has begun. • On Hold—Work is paused. • Completed—Work is complete. • Cannot Complete—Work could not be completed. • Closed—All work and associated activity is complete. • Canceled—Work is canceled, typically before any work began.

Field	Description
Status Category	<p>The category that each status value falls into. The Status Category field has eight default values: seven values which are identical to the default Status values, and a None value for statuses without a status category.</p> <p>If you create custom Status values, you must indicate which category it belongs to. For example, if you create a Waiting for Response value, you may decide that it belongs in the On Hold category.</p> <p>The Status Category field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.</p>
Subject	The line item's subject. For example, "Tire Check."
Subtotal	The line item's unit price multiplied by the quantity.
Total Price	The line item's subtotal with discounts applied.
Unit Price	By default, the unit price for a line item is the product's list price from the price book, but you can change it.
Work Order	The parent work order of the line item.
Work Order Line Item Number	An auto-generated number that identifies the work order line item.
Work Type	The work type associated with the line item. When a work type is selected, the work order line item automatically inherits the work type's Duration, Duration Type, and required skills.

Service Appointment Customer Report Fields

These fields are for service appointment customer reports for both work orders and work order line items.

Field Name	Description
Account	The account associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent. Otherwise, it remains blank.
Actual Duration (Minutes)	The number of minutes that it took the resource to complete the appointment after arriving at the address. When values are first added to the Actual Start and Actual End fields, the Actual Duration is automatically populated to list the difference between the Actual Start and Actual End. If the Actual Start and Actual End fields are subsequently updated, the Actual Duration field doesn't re-update, but you can manually update it.

Field Name	Description
Actual End	The actual date and time the appointment ended.
Actual Start	The actual date and time the appointment started.
Address	The address where the appointment is taking place. The address is inherited from the parent record if the parent record lists an address.
Appointment Number	An auto-assigned number that identifies the appointment.
Arrival Window End	The end of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the Scheduled Start and End window to allow time for delays and scheduling changes. You may choose to share the Arrival Window Start and End with the customer, but keep the Scheduled Start and End internal-only. This window is typically larger than the Scheduled Start and End window to allow time for delays and scheduling changes. You may choose to share the Arrival Window Start and End with the customer, but keep the Scheduled Start and End internal-only.
Arrival Window Start	The beginning of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the Scheduled Start and End window to allow time for delays and scheduling changes. You may choose to share the Arrival Window Start and End with the customer, but keep the Scheduled Start and End internal-only.
Contact	The contact associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent.
Created By	User who created the service appointment.
Created Date	Date the service appointment was created.
Description	The description of the appointment.
Due Date	The date by which the appointment must be completed. Earliest Start Permitted and Due Date typically reflect terms in the customer's service-level agreement.
Duration	The estimated length of the appointment. If the parent record is work order or work order line item, the appointment inherits its parent's duration, but it can be manually updated. The duration is in minutes or hours based on the value selected in the Duration Type field.
Duration Type	The unit of the duration: Minutes or Hours.
Earliest Start Permitted	The date after which the appointment must be completed. Earliest Start Permitted and Due Date typically reflect terms in the customer's service-level agreement.

Field Name	Description
Last Modified By	The user who modified the service appointment last.
Last Modified Date	The date when the work order was last modified.
Owner	The service appointment's assigned owner.
Parent Record	The parent record associated with the appointment.
Parent Record Status Category	(Read only) The Status Category of the parent record. If the parent record is a work order or work order line item, this field is populated; otherwise, it remains blank.
Parent Record Type	(Read only) The type of parent record: Account, Asset, Opportunity, Work Order, or Work Order Line Item.
Scheduled End	The time at which the appointment is scheduled to end. If you are using the Field Service Lightning managed package with the scheduling optimizer, this field is populated once the appointment is assigned to a resource. $Scheduled\ End - Scheduled\ Start = Estimated\ Duration$.
Scheduled Start	The time at which the appointment is scheduled to start. If you are using the Field Service Lightning managed package with the scheduling optimizer, this field is populated once the appointment is assigned to a resource.
Service Note	Any notes about the service.
Service Report (Create Date)	The date the service appointment was created or scheduled.
Service Territory	The service territory associated with the appointment. If the parent record is a work order or work order line item, the appointment inherits its parent's service territory.
Status	The status of the appointment. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • None—Default value. • Not Scheduled—The service appointment isn't scheduled. • Scheduled—The service appointment is scheduled. • Dispatched—The service resource is in route.. • In Progress—The service resource started work. • Completed—The service resource completed work. • Canceled—The service appointment has been canceled. • Missed—The service resource didn't make it to the location. • Running Long—The service resource started the job but didn't complete it by the scheduled end time. • LateThe service resource didn't start the job by the scheduled start time.

Field Name	Description
Status Category	<p>The category that each <code>Status</code> value falls into. The <code>Status Category</code> field has seven values which are identical to the default <code>Status</code> values.</p> <p>If you create custom <code>Status</code> values, you must indicate which category it belongs to. For example, if you create a <code>Customer Absent</code> value, you may decide that it belongs in the <code>Missed</code> category.</p> <p>The <code>Status Category</code> field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.</p>
Subject	A short phrase describing the appointment.

Linked Article Fields

A linked article is a Knowledge article that is attached to a work order or work order line item. Linked articles have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Article ID	The ID of the linked article record, which is created when an article is attached to a record.
Article Title	The title of the attached article.
Article Version	<p>The version of the article that is attached to the record. This field displays the title of the attached version, and links to the version.</p> <p>When you attach an article to a work order, that version of the article stays associated with the work order, even if later versions are published. If needed, you can detach and reattach an article to a work order to link the latest version.</p> <p>For example, if an article was entitled "How to Replace a Filter" when it was attached to the record, this field displays that title and links to the attached version.</p>
Knowledge Article ID	The ID of the article that is attached to the record.
Last Viewed	The date the article was last viewed.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Field	Description
Linked Object Type	(Read only) The type of record that the article is attached to. For example, if the article is attached to a work order, this field displays "Work Order."
Linked Record ID	The ID of the record that the article is attached to. For example, if the article is attached to a work order, this field displays the ID of the work order.
Record Type ID	The record type of the linked article. This field is populated only if record types are used.

THE FIELD SERVICE LIGHTNING MOBILE APP

The Field Service Lightning mobile app is an all-in-one tool for field service technicians on the go. This enterprise-class mobile experience leverages Salesforce in a lightweight design optimized for a modern mobile workforce. Offline capability means that users can keep working without internet connectivity and know that all their changes are saved. And the app is highly customizable, letting you tailor the Field Service Lightning mobile app to meet your business' unique needs!

Important: Before you get started, get informed! If you do not have an existing field service operation on your org, we recommend reading the Field Service Lightning documentation:

- [Planning for Field Service Lightning](#)
- [Field Service Lightning Consideration](#)

EDITIONS

Field Service Lightning features are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud.

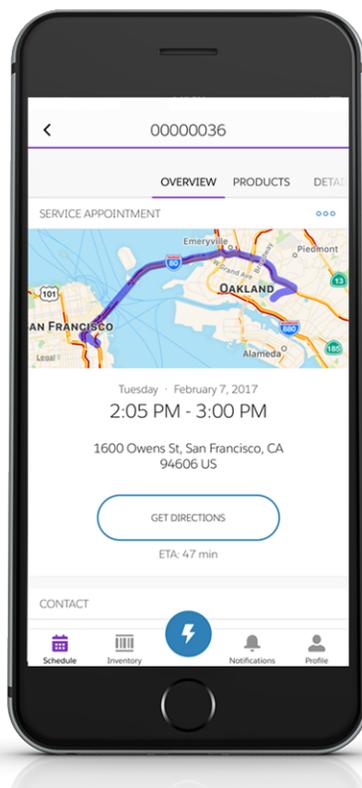


Table 1: Main Features of The Field Service Lightning Mobile App

Feature	Description
Offline Capable	The app works offline, so technicians can always complete their work, even with limited or no network connectivity.

The Field Service Lightning Mobile App

Feature	Description
Configurable Quick Actions, Workflows, and Field Service App Extensions	<p>The Field Service Lightning mobile app lets you create actions to meet the unique needs of your mobile work force.</p> <ol style="list-style-type: none">1. Quick Actions let users take actions such as creating or updating a record.2. Visual Workflow lets you easily build and manage workflows which can guide users through screens that collect and display information, create and update Salesforce records, and execute logic based on user input. Administrators design and build flows using the Flow Designer's simple drag-and-drop user interface, then activate, manage, and maintain them.3. Field Service App Extensions let you pass record data from the Field Service Lightning mobile app and connect it to other apps such as Salesforce1.
Salesforce Knowledge	Integration with Salesforce Knowledge lets admins provide useful information to your mobile work force. Create Knowledge Articles with vital information like product manuals and step-by-step instructions.
Signature Capture	Capture signatures from customers for completed work.
Chatter	Communicate with dispatchers, partners and customers using Chatter.
Geolocation Tracking	Keep tabs on service resources with resource geolocation tracking.
Custom Branding	Brand the app to give it your company's look and feel!
Configurable Layouts	Flexible layouts let you choose what record information to display to your users. Prioritize information so users can easily find what they need.

[Requirements for the Field Service Lightning Mobile App](#)

Learn about the device, edition, license, and connectivity requirements for using the Field Service Lightning mobile app.

[Prepare for the Field Service Lightning Mobile App](#)

Install the managed package and prepare your org for the Field Service Lightning mobile app. Create permission set licenses for your Field Service Lightning mobile app users.

[Get the Field Service Lightning Mobile App](#)

Download and install the Field Service Lightning mobile app on your mobile device from the App Store.

[Customize the Field Service Lightning Mobile App](#)

Learn how to customize the Field Service Lightning mobile app to meet your technicians' unique field service needs.

[Push Notifications for the Field Service Lightning Mobile App](#)

Push notifications for Field Service Lightning are a useful way of informing technicians when there are changes to his or her schedule and work.

[Field Service Lightning Mobile App Limits and Limitations](#)

Learn about the limits and limitations of the Field Service Lightning mobile app.

[Working Offline With the Field Service Lightning Mobile App](#)

Learn about the offline capabilities, limitations and data caching rules for the Field Service Lightning mobile app.

Requirements for the Field Service Lightning Mobile App

Learn about the device, edition, license, and connectivity requirements for using the Field Service Lightning mobile app.

EDITIONS

Field Service Lightning features are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud.

Supported Devices

App Name	Supported Devices	Supported Mobile OS
Field Service Lightning iOS Mobile App	<ul style="list-style-type: none"> iPhone 5c/5s or later models iPad 4 or later models (including iPad Air 2 and iPad Pro) 	iOS 9.3 or later

For optimal performance, keep your mobile devices' operating systems updated and upgrade to the latest model of devices as allowed by your mobile plan. Future versions of the Field Service mobile app may require removing support for older operating systems, and sometimes newer operating systems don't perform well on older devices.

Salesforce Editions and Licenses

These Salesforce editions and user license types allow the use of the Field Service Lightning mobile app.

Salesforce Editions
Field Service Lightning features are available in Enterprise , Performance , Unlimited , and Developer Editions with the Service Cloud.
User License Types
These user license types can access the Field Service Lightning mobile app: <ul style="list-style-type: none"> Field Service Mobile

Wireless Connection

The Mobile Field Service app is optimized for offline performance, but a Wi-Fi® or cellular network connection is needed for the app to communicate with Salesforce. For cellular connections, a 3G network or faster is required. For the best performance, we recommend using Wi-Fi or LTE.

Prepare for the Field Service Lightning Mobile App

Install the managed package and prepare your org for the Field Service Lightning mobile app. Create permission set licenses for your Field Service Lightning mobile app users.

Download the Managed Package

You must first install the managed package for the Field Service Lightning mobile app. To install the package, open the following link in your browser:

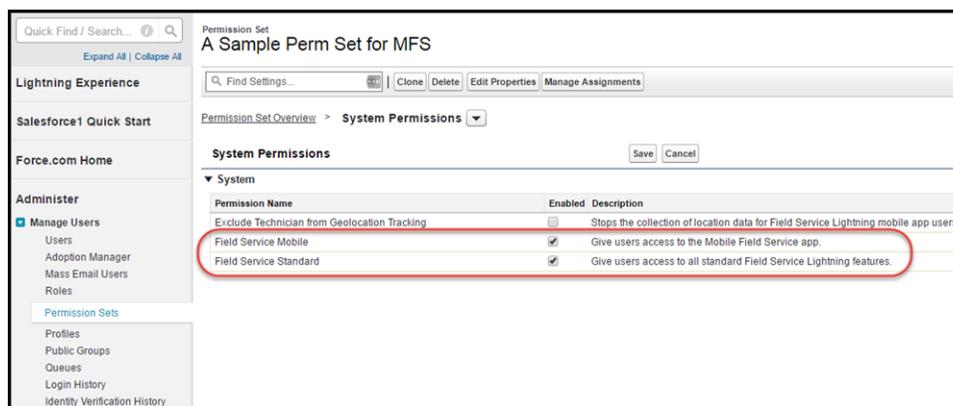
- <https://sfdc.co/MobileFieldServicePackage>

Verify Licenses and Permissions

Ensure that your users have a permission set with the necessary Field Service Mobile license and the required system permissions, object permissions, and field permissions.

1. From Setup, type *Permission Sets* into the Quick Find box, then select **Manage Users > Permission Sets**.
2. Create a **New** permission set license.
3. Select the Field Service Mobile license from the picklist.
4. Click **Save**.
5. Ensure that your permission set includes the system permissions **Field Service Standard** and **Field Service Mobile**. Click **System Permissions** and then click **Edit**.
6. Check the boxes for the **Field Service Standard** and **Field Service Mobile** system permissions, then **Save**.

! **Important:** Field Service Lightning mobile app users must have the system permissions *View Setup and Configuration* and *API Enabled*. An admin can assign these permissions either through a permission set or user profile.



7. The object settings you choose for this permission set license can vary. However, Field Service Lightning mobile app users need access to the objects and fields in the following table:

Table 2: Object Permissions

Object Names	Object Permission Needed	Field Permission Needed
Contact	Read	Email, Name, Phone, Title
Resource Absence	Read, Create, Edit	Absence Number, End Time, Start Time, Resource, Type

Object Names	Object Permission Needed	Field Permission Needed
Service Appointment	Read, Edit	Address, Appointment Number, Contact, Created By, Created Date, Owner, Parent Record, Parent Record Type, Parent Record Status, Category, Scheduled Start, Scheduled End, Status
Service Resource	Read, Edit	Active, User
Work Order	Read, Create, Edit	

Ensure that your users have access to these objects by clicking **Object Settings** and consulting the object settings for each object.

Also check the box for field permissions you would like your users to have access to with this permission set. For each object's settings, click **Save** after you have finished assigning the object and field permissions.



Tip: The Field Service Lightning mobile app can present information about asset service history, contacts that are associated with appointments, and products consumed. Depending on your use cases, it may make sense for your users to have additional object permissions. Consider giving Technicians access to objects such as Product Item, Account and Asset as well.

8. Assign this permission set to your Field Service Lightning mobile app users by clicking **Manage Assignments**, then **Add Assignments**.
9. Check the box next to each user you wish to have access to the app with this permission set, and then click **Assign**.

Associate an Active Service Resource With Your User

You must have an active service resource associated with your account to be able to access the mobile app.

1. Go to the Service Resources tab.
2. Create a **New** service resource.
3. Associate the service resource with the appropriate user.
4. Make the service resource **Active**.
5. Click **Save**.

Add Service Report to Service Appointment Page Layout

1. From Setup, type *Service Appointment* into the Quick Find box, then select **Service Appointments > Page Layouts**.
2. **Edit** the service appointment layout.
3. From the layout editor, select **Related Lists**.
4. Drag and drop the **Service Reports** related list onto the page layout.
5. Click **Save**.

Get the Field Service Lightning Mobile App

Download and install the Field Service Lightning mobile app on your mobile device from the App Store.

-  **Note:** The Field Service Lightning mobile app is only available for supported iOS devices to users with the Field Service Mobile user license. For more information on the requirements, read [Field Service Lightning Mobile App Requirements](#).

Download the App From the App Store

1. From your iOS mobile device, tap on the **App Store** icon.
2. Search for *Field Service Lightning* from the search tab.
3. Tap on *Field Service Lightning* by Salesforce.
4. Tap **+GET**, then tap **INSTALL**. Depending on the speed of your network connection, the app may take a few moments to download and install.

Launch the App for the First Time

When launching the Field Service Lightning mobile app for the first time, you are prompted to give the app various device permissions, including location services, notifications, and the device's microphone and camera.

1. Tap on the Field Service Lightning mobile app to launch it.
2. Tap **Get Started**.
3. Scroll through the onboarding screens to see demonstrations of the app's key features.
4. Tap **Log In**. Depending on how your Salesforce org is configured, you may need to tap **Use Custom Domain** and enter your org's URL. Alternatively, click on the gear widget in the top right of the login screen to specify production or sandbox org, or press **+** to enter a custom domain. Otherwise, simply enter your user name and password and tap **Log In**.
5. When prompted to give the app access to basic information, tap **Allow**.
6. If prompted, create a passcode for an added level of security then click **Next**. Confirm your password then press **Done**.
7. Tap **Turn on Location Services**.
8. Tap **Turn on Notifications**.
9. Tap **Enable Camera Access**.
10. You will see three prompts to confirm these decisions. Click **Allow** for all three prompts.

-  **Tip:** You can change the device permissions that your device gives the Field Service Lightning mobile app at any time. To do so, click on your device's **Settings**, then locate the Field Service Lightning mobile app and tap on it. From this page, you can change any of the device permissions given to the app.

The app is now ready to launch!

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

Customize the Field Service Lightning Mobile App

Learn how to customize the Field Service Lightning mobile app to meet your technicians' unique field service needs.

[Control the Service Appointment Schedule Screen](#)

Learn how to control which service appointments show up on the schedule screen for your technicians.

[Set Up Field Service App Extensions for the Field Service Lightning Mobile App](#)

Learn about connecting to other apps from Field Service Lightning mobile app. The Field Service Lightning Mobile App currently supports app extensions of the following types: iOS, Android, Workflow, Lightning Apps (S1), and web apps.

[Empower Technicians with Custom Tailored Workflows](#)

Learn how to use Visual Workflow with the Field Service Lightning mobile app. Visual Workflow lets you easily build and manage flows which can guide users through screens that collect and display information, create and update Salesforce records, and execute logic based on user input. Admins design and build flows using the Flow Designer's simple drag-and-drop user interface, then activate, manage, and maintain them. After setting up a flow, admins can connect flows to the Field Service Lightning mobile app for their technicians to use.

[Provide Knowledge Articles to Technicians](#)

Learn how to attach Salesforce Knowledge articles to work orders to provide useful information like product manuals and step-by-step instructions to your technicians.

[Brand the Field Service Lightning Mobile App](#)

Learn how to give the Field Service Lightning mobile app your company's look and feel by coloring the user interface. Apply your company colors to the interface, or, alternatively, optimize the color scheme to compensate for the relative brightness or darkness of your technicians' work environments.

[Set the Company Image on the Profile Screen](#)

Upload a company image, such as a logo, to display as the background of the user profile page of the Field Service Lightning mobile app.

[Track Work with the Chatter Feed](#)

Integrate Chatter into the Field Service mobile app. The Chatter feed gives field service workers, dispatchers, and customers a place for text and content posts.

[Geolocation and Other Field Service Lightning Mobile App Settings](#)

Learn about the various Field Service Lightning mobile app setting that you can modify in your org. Track your assigned resources with geolocation bread crumbs or, alternatively, learn how to exclude a service resource from geolocation tracking. Control how frequently record data and metadata automatically refreshes.

[Prominently Display Key Information with Layouts](#)

Use layouts to control how information is displayed in the Field Service Lightning mobile app. Set compact and search layouts to preview and prominently anchor key fields. Use page layouts to control which cards are found on the appointment overview screen.

[Empower Users with Quick Actions](#)

Add quick actions to an object's page layouts so technicians can create and edit records on the go, quickly send messages to contacts, and more.

[Inventory Management with the Field Service Lightning Mobile App](#)

Learn about the inventory management system for the Field Service Lightning mobile app. Create locations for tracking products and associate them with service resources. Add products required to work orders to represent the products your technicians need to complete jobs. Track the products consumed by your technicians.

Control the Service Appointment Schedule Screen

Learn how to control which service appointments show up on the schedule screen for your technicians.

The Field Service Lightning mobile app loads service appointments that are assigned to the current user. These appointments are first surfaced in the app from the main schedule screen. Depending on what your technicians' needs are, you can use a listview to control which of their assigned appointments are loaded into the schedule screen. If you choose not to set up a service appointment listview, the Field Service Lightning mobile app by default loads the users schedule of service appointments for a 15 day range. This range includes 7 days into the past, the present day, and 7 days into the future.

1. Navigate to the **Service Appointments** tab. If you do not see this tab on the top navigation bar, click the **+** button at the far right of the top bar, and then select **Service Appointments**.
2. Next to the **View** dropdown list, click **Create New View**.
3. Enter a name for your new listview, like *FieldServiceMobile*. Note the **View Unique Name** because you need to use this name to connect this listview with the Field Service Lightning mobile app.
4. Configure the criteria for your service appointment listview under **Specify Filter Criteria**. For **Filter By Owner**, select **Assigned to me**.
5. Under **Filter By Additional Fields (Optional)** you can use filter logic to control which records show up on your listview. Consider using the fields *Scheduled Start* and *Schedule End* in your filter criteria.
6. Under **Restrict Visibility**, select **Visible to all users**.
7. Click **Save**.
8. From **Setup** enter *Field Service Mobile* into the Quick Find box.
9. Click **Edit**.
10. Locate the setting **Default ListView Developer Name**. Enter the **View Unique Name** of your recently created list view.
11. Click **Save**.

If the Scheduled Start Date field is not part of your filter criteria, users cannot use the date-picker from the schedule screen in the Field Service Lightning mobile app. Instead, users see a single schedule screen which is populated and ordered with service appointments based off of your filter criteria. If your filter criteria does contain Scheduled Start Date as part of the filter criteria, the date picker will have a range from 45 days into the past to 45 days into the future.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

Set Up Field Service App Extensions for the Field Service Lightning Mobile App

Learn about connecting to other apps from Field Service Lightning mobile app. The Field Service Lightning Mobile App currently supports app extensions of the following types: iOS, Android, Workflow, Lightning Apps (S1), and web apps.

You can create app extensions to allow users to pass data from the Field Service Lightning mobile app to another program. App extensions can be created and configured in Setup by selecting the connected app that you wish to make the extension for. App Extensions have the following fields:

- **Name:** The name of the extension.
- **Label:** The label as it appears to users in the app.
- **Type:** A picklist of types of app extensions: iOS, Android, Workflow, and Lightning Apps.
- **Scoped To Object Types:** This field determines from which records a user can activate an app extension. Scoping an app extension to an object allows users to activate that app extension from records of the specified type. The object names are entered as comma separated values and must have no spaces. For example, to scope an extension to the Work Order object and the Service Appointment object, you would enter *WorkOrder, ServiceAppointment*.

 **Note:** To create a global app extension, leave the Scoped To Object Types field blank. This allows users to activate it from anywhere.

- **Launch Value:** This is a free text field which has similar format to a URL with the option to specify place holder tokens that the Field Service Lightning mobile app inserts. This field directs the app to the appropriate app extension. Read the proceeding section for more information on properly using this field.

Passing Tokens Into the Launch Value

The launch value supports static URLs for web addresses as well as dynamic values that you can represent with certain tokens. These tokens can pass field information from the record that the user is currently viewing. For example, if the user is viewing a service appointment, the tokens can be used to pass the data from any field on that service appointment to the app extension. The basic format for these tokens is based on the names of the field, like so: **{!\$Name}**.

 **Tip:** The following example uses a token to dynamically pass the name of the user to a Google search. The token is written in bold for clarity: [https://www.google.com/#q={!\\$User.userName}](https://www.google.com/#q={!$User.userName})

Table 3: Dynamic Value Tokens for App Extension Launch Value

Dynamic Value Tokens	Description
{!\$Organization.Id}	The org id.
{!\$User.userId}	The object id for the user.
{!\$User.orgId}	The org id of the user.
{!\$User.userName}	The username of the user.
{!\$User.nickName}	The nick name of the user.
{!\$User.displayName}	The display name of the user.
{!\$User.email}	The email address of the user.
{!\$User.firstName}	The first name of the user.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To create and modify App Extensions:

- “Customize Application”

Dynamic Value Tokens	Description
{!\$User.lastName}	The last name of the user.
{!\$User.language}	The localization of the user.
{!\$User.locale}	The geographic area of the user.

Configuring Lightning App Extensions

You can find all the lightning apps that are configured in your org from inside Setup. Once you have found the name of the lightning app that you wish to connect to Field Service Lightning mobile app, you can create your app extension by using the name of a lightning app on this list as the launch value of your lightning app extension.

1. From Setup, type *Salesforce1* into the Quick Find box, and select **Salesforce1 Navigation**.
2. Note the exact name of the Lightning App from the list of Available and Selected apps. You will need to use this name as the Launch Value when creating your lightning app extension for the Field Service Lightning mobile app.

Empower Technicians with Custom Tailored Workflows

Learn how to use Visual Workflow with the Field Service Lightning mobile app. Visual Workflow lets you easily build and manage flows which can guide users through screens that collect and display information, create and update Salesforce records, and execute logic based on user input. Admins design and build flows using the Flow Designer's simple drag-and-drop user interface, then activate, manage, and maintain them. After setting up a flow, admins can connect flows to the Field Service Lightning mobile app for their technicians to use.

 **Important:** The Field Service Lightning mobile app supports only flows that have the type Field Service Mobile. Additionally, the following flow features are not supported by the Field Service Lightning mobile app:

- Resources of the type Text Formula
- Screens with prespecified validation rules
- Actions cannot rely on the output parameters of any action
- Returning to a previous screen is not allowed during a flow when a loop or subflow is used in the flow
- Dynamic hide/show fields are not supported for field rules on flow screens
- The *wasSelected* operator cannot be used in decisions

 **Tip:** To learn more about creating flows refer to the help article [Workflow](#).

Connect A Flow As An App Extension

1. From Setup, type *Field Service Mobile* into the Quick Find box, and click **Field Service Mobile Settings**.
2. **Add** a new App Extension.
3. Enter a label for your app extension. This label field corresponds to the label that your technicians see in the app's user interface.
4. From the **Type** picklist, select *Flow*.
5. Enter a **Name** that expresses the purpose of the flow.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To create workflows:

- "Customize Application"

! **Important:** As an admin, you can specify a special type of workflow for wrapping up an appointment. This special Workflow appends a final step to capture a customer's signature. To specify this special Workflow, set the **Name** field to be `Service_Report_Flow`; this flow **must** be scoped to the Service Appointment object to trigger service closure.

- The field **Scoped to Object Types** controls where users can find and activate the workflow. For example, setting the Scoped to Object Types to Contacts means users can activate that flow from the detail page of a contact record. To create an unscoped workflow action, simply leave the field blank. Unscoped actions allow users to activate the flow from various pages, and not simply when viewing a record to which the flow is scoped to.

💡 Tip: To scope a flow to multiple objects, enter the API names of the scoped to objects separated by commas.

- Set the **Launch Value** to equal the unique name of your workflow.

- Click **Save**.

Flow Considerations

- When the Field Service Lightning mobile app loads a user's schedule data, it will also download global flows and any flows that are scoped to records in their schedule data. Pulling down on the screen to sync with Salesforce also causes the app to reload flow metadata.
- When the Field Service Lightning mobile app launches into a flow, it passes the following input parameters:
 - Id:** The record ID of the record that the workflow is launched from.
 - ParentId:** The record ID of the parent record that the workflow is launched from. For example, if a workflow is launched from a service appointment, this will be the ID of the parent work order or work order line item.
 - UserId:** The ID of the current user.

Flow Best Practices

In order to make your flow actions easy and useful for your technicians, consider the following best practices when creating a new flow:

- Supply help text on each screen to guide your users and to make clear what is expected of them on each screen.
- Avoid asking more than a single question per screen in your flows, especially if your screens involve picklists.

Provide Knowledge Articles to Technicians

Learn how to attach Salesforce Knowledge articles to work orders to provide useful information like product manuals and step-by-step instructions to your technicians.

Salesforce Knowledge lets you create articles to address questions your users may run into. Integration with the Field Service Lightning mobile app enables admins to serve custom created content to your technicians based on the unique needs of your field service operation. Salesforce Knowledge must be set up before Knowledge articles can be added as a related list to work order and work order line item page layouts. To learn more about implementing Salesforce Knowledge refer to the [Salesforce Knowledge Implementation Guide](#).

💡 Tip: The Field Service Lightning mobile app does not support inline images in Knowledge Articles. As an alternative we recommend using an image link instead for your users to open themselves.

Add Articles to the Work Order Page Layout

- From Setup, enter *Work Orders* in the Quick Find box and click **Work Orders > Page Layouts**.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To customize page layouts:

- "Customize Application"

2. **Edit** the Work Order Layout.
3. On the layout editor, select **Related Lists**.
4. Drag and drop Articles to the page layout.
5. Click **Save** on the layout editor.

Brand the Field Service Lightning Mobile App

Learn how to give the Field Service Lightning mobile app your company's look and feel by coloring the user interface. Apply your company colors to the interface, or, alternatively, optimize the color scheme to compensate for the relative brightness or darkness of your technicians' work environments.

The Field Service Lightning mobile app lets you change the color of various parts of the app's user interface. Consult the branding table to learn which settings control which UI elements within the app.

1. From Setup, type *Field Service Mobile Settings* into the Quick Find box, then select **Field Service Mobile Settings**.
2. **Edit** the Field Service Mobile Settings Detail.
3. Enter color hex-codes into the **Brand Colors** settings to replace the default values. consult the branding table below for more details.

 **Important:** Enter color hex-code values with the format of the default values in the table below, including the # symbol before hex-code.

 **Note:** Users that enable the Dark Theme from the Field Service Lightning mobile app settings will override custom colors settings for most UI elements. This setting only effects devices that enable Dark Theme and has no impact on other users.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To customize branding colors:

- "Customize Application"

Table 4: Branding Table

Token Name	Description	Default Value
Navbar Background Color	The color of the top bar in the app.	#FCFCFC
Brand Inverted Color	The color of toasts and the contrast color for the floating action button.	#FFFFFF
Feedback Primary Color	The color of error messages.	#C23934
Feedback Secondary Color	The color of success messages.	#007FAA
Primary Brand Color	The main branding color used throughout the UI.	#803ABE
Secondary Brand Color	The color of action buttons.	#2F81B7
Contrast Primary Color	The color of primary text.	#000000
Contrast Secondary Color	The color of secondary text.	#444444
Contrast Tertiary Color	The color of the icons on the settings screen and of primary lines that delineate different areas of the UI.	#9FAAB5

Token Name	Description	Default Value
Contrast Quaternary Color	The color of secondary lines that delineate different areas of the UI.	#E6E6EB
Contrast Quinary Color	The color of primary backgrounds in the UI.	#F8F8F8
Contrast Inverted Color	The color of secondary backgrounds in the UI.	#FFFFFF

Customize your app's branding tokens in Setup using hex-code colors.

1. From Setup, enter *Field Service Mobile* in the Quick Find box, and select **Field Service Mobile Settings**.
2. **Edit** the Field Service Mobile Settings Detail.
3. For each branding token, enter the desired color in the form of a hex-code preceded with a #.
4. When you have entered values for every token you wish to modify, click **Save**.



Example: To set a branding token to the color black, enter the value `#FFFFFF`.

Set the Company Image on the Profile Screen

Upload a company image, such as a logo, to display as the background of the user profile page of the Field Service Lightning mobile app.

Upload an image to use as the profile background.

1. From Setup, enter *Static Resources* into the Quick Find box and click **Static Resources**.
2. Create a **New** static resource.
3. Give the static resource a name. Remember the name you give your static resource. You need to use it in a later step.
4. Select an image file for upload. We recommend using an image sized at 3072x819 for best results on large displays such as iPads in landscape mode. Alternatively, consider using a smaller image size to make the image easier to download for users with slower mobile networks.
5. Click **Save**.

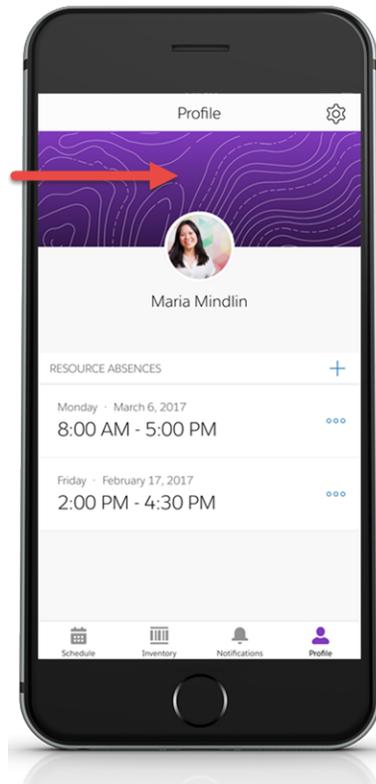
EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To set the company profile image:

- "Customize Application"



Create a custom attribute to use the static resource as your company image on the user profile screen.

1. From Setup, enter *Connected Apps* into the Quick Find box, and select **Connected Apps**.
2. Select **Salesforce Field Service for iOS**.
3. Scroll down to the list Custom Attributes and click **New**.
4. For the attribute key, enter *COMPANY_PROFILE_IMAGE_RESOURCE_NAME*.
5. For the attribute value, enter the name of the static resource you created in the previous section, except you must wrap the name with quotation marks.

 **Tip:** If you named your static resource *Example_static_resource* then your attribute value should be "*Example_static_resource*".

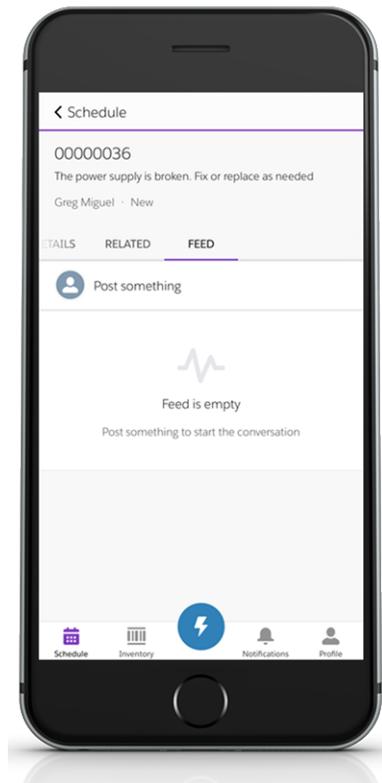
6. Click **Save**.

Track Work with the Chatter Feed

Integrate Chatter into the Field Service mobile app. The Chatter feed gives field service workers, dispatchers, and customers a place for text and content posts.

Enable feed tracking on work orders.

1. From Setup, enter *Chatter* into the Quick Find box and select **Feed Tracking**.
2. Select **Work Order** from the object list.
3. Check **Enable Feed Tracking**.
4. Click **Save**.



EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To customize fields tracked in feeds:

- “Customize Application”

To view the field tracking setup page:

- “View Setup and Configuration”

Chatter Limitations

The Field Service Lightning mobile app supports only limited Chatter functionality. Users are able to make and receive text posts and content posts. However, the app does not yet support @mentioning people, or displaying the feed-tracked changes for records.

Geolocation and Other Field Service Lightning Mobile App Settings

Learn about the various Field Service Lightning mobile app setting that you can modify in your org. Track your assigned resources with geolocation bread crumbs or, alternatively, learn how to exclude a service resource from geolocation tracking. Control how frequently record data and metadata automatically refreshes.

Configure service resource tracking to have the Field Service Lightning mobile app upload the geolocation of your technicians at regular intervals.

1. From Setup, enter *Field Service* in the Quick Find box, and select **Field Service Mobile Settings**.
2. Click **Edit**.
3. Click Send Location History to enable geolocation tracking for service resources.
4. Enter the Minimum Update Frequency of Geo Location in Minutes to control how often geolocation is polled.
5. Enter the Record Data Cache Time in Minutes. We highly recommend setting this to 240 minutes or more to limit the frequency of server queries the Field Service Lightning app makes automatically.
6. Enter the Update Schedule Time in Minutes. This controls how frequently the Field Service Lightning mobile app checks for updates to users' schedule of assigned service appointments.
7. Set the Geo Location Accuracy to control how accurate the geolocation data is. Higher precision required additional battery power on mobile devices.
8. Set the Time Interval Setup in Minutes. This controls the interval when selecting time values from a picklist in the app.
9. Enter the Metadata Cache Time in Days. This controls how long metadata, such as page layouts, is stored in memory for Field Service Lightning mobile app users.
10. Enable Show Edit Full Record. This gives users the ability to use the full edit action on records that they have access to.
11. Click **Save**.

Excluding Individuals From Geolocation Tracking

You can exclude individuals from geolocation tracking even if geolocation tracking is enabled in your org.

1. From Setup, enter *Permission Sets* into the Quick Find box and select **Manage Users > Permission Sets**.
2. Create a separate permission set for users that you wish to exclude from geolocation tracking. You can do this by cloning your Field Service Standard permission set and giving it a new name.
3. Click your newly created permission set to edit it.
4. Click **System Permissions**
5. Click **Edit** and enable the permission called **Exclude Technician from Geolocation Tracking**.
6. Click **Save**.
7. Click **Manage Assignments**, then apply this permission set to the users you wish to exclude from geolocation tracking by checking the box next to the names of each user. Then click **Add Assignment**.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To configure resource tracking:

- "Customize Application"

Prominently Display Key Information with Layouts

Use layouts to control how information is displayed in the Field Service Lightning mobile app. Set compact and search layouts to preview and prominently anchor key fields. Use page layouts to control which cards are found on the appointment overview screen.

[Control Record Highlights with Compact Layouts](#)

Use compact layout settings to control record highlights in the Field Service Lightning mobile app.

[Control the Appointment Overview Screen with Page Layouts](#)

Use page layout settings for Work Orders and Work Order Line Items to control which “cards” are presented to the user on the appointment overview screen. The cards are discrete sections in the user interface for different types of records.

[Control the Schedule Screen with Search Layouts](#)

Control the main schedule screen of the Field Service Lightning mobile app by changing the search layout settings of the service appointment object.

Control Record Highlights with Compact Layouts

Use compact layout settings to control record highlights in the Field Service Lightning mobile app.

When a record is presented as a record highlight (showing a preview of the record) the display is driven by the compact layout settings of that record. The top-most field in a record’s compact layout is displayed prominently, while the remaining fields are displayed underneath it. Consider what fields your users will want to be displayed most prominently before modifying an object’s compact layout.

1. From Setup, enter the object name that you wish to modify in the Quick Find box and select **Compact Layouts**.
2. **Edit** the compact layout.
3. Select the field you wish to add from either the Available Fields list or Selected Fields list.
4. **Add** the field you wish to prominently display to the Selected Fields list if it isn’t already.
5. Use the **Up** and **Down** buttons to order the Selected Fields so that the desired field is at the top of the Selected Fields list.
6. Click **Save**.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To modify page layouts, search layouts, and compact layouts:

- “Customize Application”

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To modify compact layouts:

- “Customize Application”

Control the Appointment Overview Screen with Page Layouts

Use page layout settings for Work Orders and Work Order Line Items to control which “cards” are presented to the user on the appointment overview screen. The cards are discrete sections in the user interface for different types of records.

When a user selects a service appointment from the schedule screen, they are taken to the appointment overview screen. On this screen, the Field Service Lightning mobile app displays information in spaces called cards. These cards are discrete spaces for different kinds of records or other information like chatter posts. Adding or removing a field will add or remove the corresponding card. Refer to the table below for details on all the possible cards that can be added to the appointment overview screen. Think carefully about which cards your users will want to access from the appointment overview screen.

Table 5: Possible Cards on the Appointment Overview Screen

Cards	Description
Address Card	Shows a map and the option to navigate to the address of the appointment. If the address is not set, the card instead presents the user with the option to set the address, and then activate navigation.
Contact Card	Shows the contact’s name and photo and gives the option to call, SMS or email the contact.
Asset Card	Provides context about the maintenance history of an asset. It shows the asset that is associated with the current work order and a list of work orders associated with that asset.
Work Order Line Item Card	Shows the progress of a parent work order or work order line item record and its children work order line item records. Can be configured to let users create new child line items as discussed in Empower Users to Create Child Work Order Line Items.
Knowledge Card	Presents the user with knowledge articles that are associated with the work order or work order line item.

1. From Setup, type *work orders* into the Quick Find box and select **Work Orders > Page Layouts**.
2. Use the page layout editor at the top of your screen to add or remove fields from the Work Order page layout.
3. Click **Save** on the layout editor.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To modify page layouts:

- “Customize Application”

Control the Schedule Screen with Search Layouts

Control the main schedule screen of the Field Service Lightning mobile app by changing the search layout settings of the service appointment object.

The Field Service Lightning mobile app displays a list of service appointments that are assigned to the user on the schedule screen. The app prominently displays the top two fields of the service appointment search layout. Consider which fields your technicians want to see from this screen. For example, in the screenshot, the service appointment's ID and status are set to the first and second fields respectively. Many technicians, for example, may be more interested in seeing the subject field instead of the record ID.

 **Note:** The app displays the scheduled start time and the address in the same location regardless of the Service Appointment search layout settings.

1. From Setup, enter *Service Appointments* in the Quick Find box and select **Search Layouts**.
2. **Edit** the Search Results search layout.
3. Select the field you wish to add from either the Available Fields list or Selected Fields list.
4. **Add** the field to the Selected Fields list if it isn't already.
5. Use the **Up** and **Down** buttons to order the Selected Fields so that the desired two fields are at the top of the Selected Fields list.
6. Click **Save**.

Empower Users with Quick Actions

Add quick actions to an object's page layouts so technicians can create and edit records on the go, quickly send messages to contacts, and more.

When a user is viewing a record, they can use the quick actions on that record's page layout by pressing the action button. The action button lets users take actions that are assigned to the page layout of whatever record is currently opened. For example, adding a Create Opportunity action to the page layout of contacts will let the user create a new opportunity from any contact record detail page in the app. Think carefully about which object-specific quick actions to create for your users.

Unlike other records which only let you take quick actions that are on the page layout of that record, the service appointment overview screen has a consolidated action list for service appointments, work orders, and work order line items. This means that when a user clicks the action button from the service appointment overview screen, they will see a list of actions that include the following:

- Create Service Report, a hardcoded action that triggers the job wrap-up process. This action is only available if the work order is assigned to user, and an alternate service closure flow is not configured
- Field Service App Extensions for Service Appointments
- Field Service App Extensions for Work Orders
- Quick Actions for Service Appointments
- Quick Actions for Work Orders or Work Order Line Items (depending on if the parent record is a work order or a work order line item)
- Edit Work Order / Work Order Line Item (depending on if the parent record is a work order or a work order line item)
- Open in Salesforce1 (This option only appears if Salesforce1 is installed on the mobile device)

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To modify search layouts:

- "Customize Application"

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To create quick actions and add them to page layouts:

- "Customize Application"

! **Important:** The supports quick actions of the types Create Record and Update Record. VisualForce, Lightning Component, and Custom Override actions are not supported.

Create a Quick Action for the Appointment Overview Screen

The appointment overview screen shows technicians information from the work order or work order line item associated with their current service appointment.

1. From Setup, enter *Work Orders* in the Quick Find box and select **Work Orders > Buttons, Links, and Actions**.
2. Click **New Action**.
3. Configure the action to either create a record or edit a record. Lightning Component, VisualForce, and custom override actions are not supported.
4. From Setup, enter *Work Orders* in the Quick Find box and select **Work Orders > Page Layouts**.
5. **Edit** the Work Order Layout.
6. From the layout editor, select **Quick Actions** then drag and drop your newly created action into the Quick Actions in the Salesforce Classic Publisher.
7. Click **Save** on the layout editor.

[Configure the Work Order Line Item Card to Manage Complex Jobs](#)

Learn how to configure the work order line item card. If children work order line items are added to a work order or work order line item, technicians can see the work order line item card on the appointment overview screen. The work order line item card displays the progress of a parent work order or line item as well as its child work order line item from the appointment overview screen. This can be useful for tracking complex jobs that are broken up into multiple work order line items.

Configure the Work Order Line Item Card to Manage Complex Jobs

Learn how to configure the work order line item card. If children work order line items are added to a work order or work order line item, technicians can see the work order line item card on the appointment overview screen. The work order line item card displays the progress of a parent work order or line item as well as its child work order line item from the appointment overview screen. This can be useful for tracking complex jobs that are broken up into multiple work order line items.

Empower Users to Create Child Work Order Line Items From the Work Order Line Item Card

1. From Setup, enter *Work Orders* into the Quick Find box and select **Work Order > Buttons, Links, and Actions**.
2. Click **New Action**.
3. Select the action type **Create a Record**.
4. Select the target object **Work Order Line Item**.
5. Select the standard label type **New Child [Record]**.
6. Input a label. This also automatically generates the API name.
7. Enter the action description.
8. Select whether or not to create a Chatter feed post with the action.
9. Click **Save**.
10. From Setup, enter *Work Orders* into the Quick Find box and select **Work Orders > Page Layouts**. **Edit** the Work Order Layout.
11. From the layout editor select **Quick Actions**.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

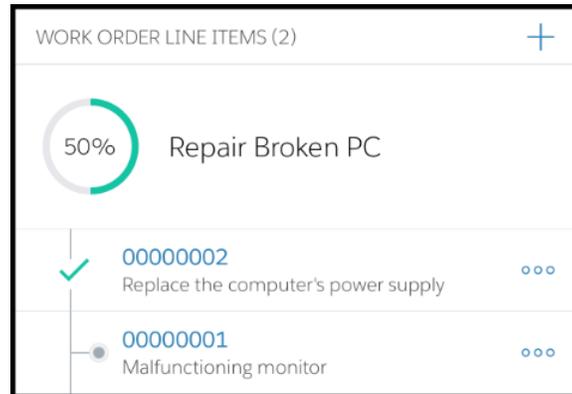
USER PERMISSIONS

To create quick actions and add them to work order line item page layouts:

- "Customize Application"

12. Drag and drop your newly created action into the **Quick Actions in the Salesforce Classic Publisher**.

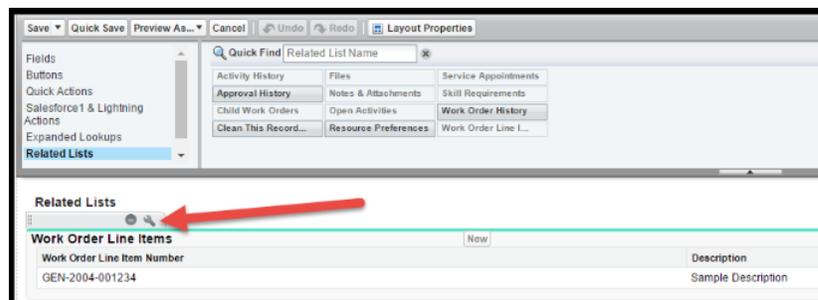
13. Click **Save**.



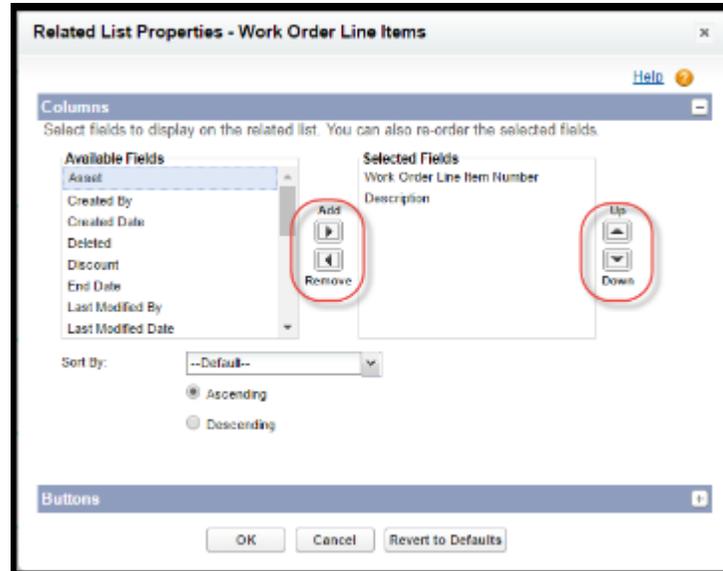
Control Which Fields Are Previewed in the Work Order Line Item Card

The work order line item card displays two fields for each line item. You can control these fields through the page layout settings of Work Orders by modifying the Work Order Line Item related list properties.

1. From Setup, enter Work Orders in the Quick Find box and select **Work Orders > Page Layouts**.
2. If the work order line item related list is not added to the page layout, do so now by clicking **Related Lists** in the layout editor and dragging **Work Order Line Items** onto the page layout.
3. **Edit** the Work Order Line Items related list by clicking the wrench icon.



4. Add your desired field to be one of the top two fields in the Selected Fields column. You will see a list of available fields and select fields. Move fields into the select fields column with the **Add** arrow, or out with the **Remove** arrow. Sort the order of the selected fields with the **Up** and **Down** arrows.
5. Click **Save**.



Inventory Management with the Field Service Lightning Mobile App

Learn about the inventory management system for the Field Service Lightning mobile app. Create locations for tracking products and associate them with service resources. Add products required to work orders to represent the products your technicians need to complete jobs. Track the products consumed by your technicians.

[Configure Locations to Track Your Technicians' Inventory](#)

Learn about tracking products with van locations.

[Track the Products Your Technicians Consume While on the Job](#)

Learn how to record the products consumed by your technicians from completing work orders.

[Use Products Required So Technicians Know What They Need to Complete Work](#)

Learn how to add products required to work orders so technicians know what they need to bring with them to complete their work in the field.

Configure Locations to Track Your Technicians' Inventory

Learn about tracking products with van locations.

Locations are used to represent physical areas where products are stored. Because field service technicians typically bring products with them in their vehicle, you can create a special type of location to represent the van stock of your technicians.

Create a Location To Represent the Van Stock Of a Technician

As an admin, you can represent your technicians' van stock by creating a location of the location type Van. You can then associate this location with the Service Resource of the technician who drives the van.

1. From Salesforce select the **Locations** tab. If you do not have Locations added on your navigation bar, instead click the **+** and then select **Locations**.
2. Create **New** location.
3. If you are creating a location record to represent van stock for your technicians, be sure to select the **Mobile Location** and **Inventory Location** options.
4. Associate the van location with the service resource who uses the vehicle for field service. Select the **Service Resource** tab or press the **+** in the navigation bar and then select **Service Resource**.
5. Select the service resource associated with your technician, then use the location field to associate the newly created van location with the service resource.

Add Product Items To Represent Van Stock

Once you have created a van location, you are ready to track individual product items. Product items are actual quantities of products that are represented by a product record. Establishing the exact quantity of parts in a van stock allows your technicians to decrement their van stock when they consume parts, as well as to keep track of the parts that are required to complete future work.

1. In Salesforce Classic, click the **+** button to show a list of all available tabs, then click **Product Items**.
2. Create a **New** product item.
3. Use the product name lookup field to select the product that this product item is an instance of.
4. Use the location lookup field to select the van location of your service resource.
5. Enter the quantity that the user has in their van stock in the quantity on hand field.
6. From the quantity unit of measure picklist, select **Each** if the product comes in discrete units. Or, if the product item is used in non-discrete units, such as lengths of tape, select the value **None** from the picklist.

With mobile van locations associated with your service resources, your technicians can now keep track of their van stock from the **Inventory** tab in the Field Service Lightning mobile app.

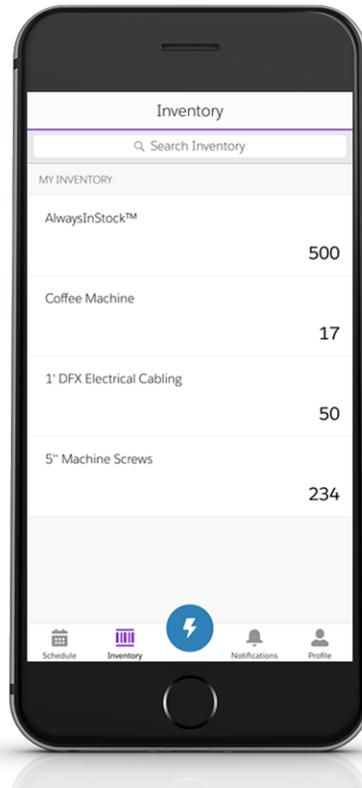
EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud.

USER PERMISSIONS

To configure locations:

- "Customize Application"



Using Pricebooks To Track Products

It may make sense to add a price book to certain work orders, especially if your field service operation employs contractors as technicians. The pricebook gives users the ability to search through the pricebook for products and log the use or sale of products throughout completing a work order.

1. From Setup, enter *work orders* in the Quick Find box, and select **Work Orders > Page Layouts**.
2. From the layout editor at the top, drag the Price Book field into the Work Order detail section.
3. Click **Save**.

Track the Products Your Technicians Consume While on the Job

Learn how to record the products consumed by your technicians from completing work orders.

Before you can track products consumed by your technicians, you must first associate your service resources with a location. Locations are areas where products can be stored. Mobile locations can be configured to represent the vehicle that technicians use to store and transport the tools and supplies they need to finish their work. To learn more about setting up van locations, refer to [Configure Locations to Track Your Technicians' Inventory](#).

Add Products Consumed To Work Orders

1. From Setup, type *work orders* into the Quick Find box, then select **Work Orders > Page Layout**.
2. From the layout editor, add the **Products Consumed** to the related lists on the work order page layout.
3. Click **Save**.

With products consumed added to the work order page layout, your technicians can use the Field Service Lightning mobile app to log products consumed and have it decrement those products from their van stock.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To configure products consumed:

- "Customize Application"

Use Products Required So Technicians Know What They Need to Complete Work

Learn how to add products required to work orders so technicians know what they need to bring with them to complete their work in the field.

Products required can be added as a related list to work order and work order line items. The products required represent the product items that a technician needs to have in stock to finish a particular job. The user sees a visual indicator on the work order if a technician has insufficient product items to complete the service appointment they are viewing.

1. From Setup, type *work order* into the Quick Find box, and then select **Work Orders > Page Layouts**.
2. From the layout editor, add the **Products Required** related list to the work order page layout.
3. Click **Save**.

When creating work orders for your technicians, you can add Products Required from the related list. Setting up van locations for your technicians, as discussed in [Configure Locations to Track Your Technicians' Inventory](#), allows your technicians to check their van stock against the products required to complete the work order. The Field Service Lightning mobile app displays a visual indicator when your technicians' van stock has insufficient products to complete the appointment.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

USER PERMISSIONS

To configure products required:

- "Customize Application"

Push Notifications for the Field Service Lightning Mobile App

Push notifications for Field Service Lightning are a useful way of informing technicians when there are changes to his or her schedule and work.

You need Field Service notifications enabled and the Field Service Lightning iOS Mobile App connected app installed for mobile app users to receive push notifications. You can download the connected app by pasting the following link into your browser:

- <https://sfdc.co/MobileFieldServicePackage>

Notification Triggers

Field Service Lightning mobile app users receive notifications when one of the following triggers occur:

- There is a Chatter text or file post to a Work Order you follow
- A feed-tracked change is posted to a Work Order or Service Appointment you follow
- There is an assignment change that affects you, either because a service appointment is assigned to you or assigned away from you.

Known Limitations

Field Service Lightning does not currently have out-of-the-box functionality to automatically make your technicians followers on work order and service appointment records. You may want to create your own Apex triggers on service resource object to make this happen when a technician is assigned to and away from a service appointment.

[Enable Notifications for the Field Service Lightning Mobile App](#)

Learn how to enable notifications in your org so technicians always work with the latest information.

Enable Notifications for the Field Service Lightning Mobile App

Learn how to enable notifications in your org so technicians always work with the latest information.

You can enable notifications in your org settings so Salesforce sends notifications to relevant users in the Field Service Lightning mobile app, Salesforce1, and Lightning Experience. In the Field Service Lightning mobile app notifications are sent as push notifications while the app is running in the background. When the app is in the foreground notifications are tracked on their own tab with a badge showing the number of notifications.

Enable Field Service Notifications

1. From Setup, enter *Field Service Settings* in the Quick Find box, then select **Field Service Settings**.
2. Select **Notify relevant users in Salesforce1 and Lightning Experience about updates to work orders and service appointments**.

 **Note:** Selecting this option also enables notifications for relevant users in Salesforce1 and Lightning Experience.

3. Click **Save**.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

Field Service Lightning Mobile App Limits and Limitations

Learn about the limits and limitations of the Field Service Lightning mobile app.

The Field Service Lightning mobile app has the following limits and limitations:

- Flow has the following limitations:
 - Resources of the type Text Formula
 - Screens with prespecified validation rules
 - Actions cannot rely on the output parameters of any action
 - Returning to a previous screen is not allowed during a flow when a loop or subflow is used in the flow
 - Dynamic hide/show fields are not supported for field rules on flow screens
 - The `wasSelected` operator cannot be used in decisions
- Quick Actions have the following limitations:
 - Custom override on actions is unsupported, including custom override on lookup logic
 - Only plain text is supported for rich text fields
 - Default values are not available in offline mode
- Dependent Picklists are not supported.
- The barcode scanner is compatible with 1D serial barcodes and 2D QR codes only.
- Users are able to make and receive text posts as well as content posts. However, the app does not yet support @mentioning people, or displaying the feed-tracked changes for records.
- Knowledge Articles viewed in the app do not support inline images. As an alternative we recommend using an image link instead for your users to open themselves.

EDITIONS

Field Service Lightning features are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud.

Working Offline With the Field Service Lightning Mobile App

Learn about the offline capabilities, limitations and data caching rules for the Field Service Lightning mobile app.

[Offline-Mode Considerations and Limitations](#)

Learn about the offline capabilities of the Field Service Lightning mobile app and considerations for working in offline mode.

[Offline Data Limitations For The Field Service Lightning Mobile App](#)

Learn about the data priming rules for working without network connectivity in the Field Service Lightning mobile app.

EDITIONS

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Offline-Mode Considerations and Limitations

Learn about the offline capabilities of the Field Service Lightning mobile app and considerations for working in offline mode.

As an admin, you can control which records appear on your users' schedules by creating a default service appointment listview and linking it to the Field Service Lightning mobile app. Otherwise the app instead loads the user's schedule of work orders for a 15 day range. This range includes seven days into the past, the present day, and seven days into the future.

Offline-Mode Limitations

- You cannot sync data with Salesforce while offline. This means you cannot receive updates to records or page layouts.
- Updating records and creating new records adds these changes to a queue. This queue uploads the changes to Salesforce when internet access is restored. You can review and even cancel all pending uploads from the pending upload queue in the app's settings.
- Navigation services are disabled while offline.
- Service resource geolocation tracking is disabled while offline.
- The default values for lookup fields are not populated while offline.
- Record data and metadata is deleted after 60 days of not being read or edited.

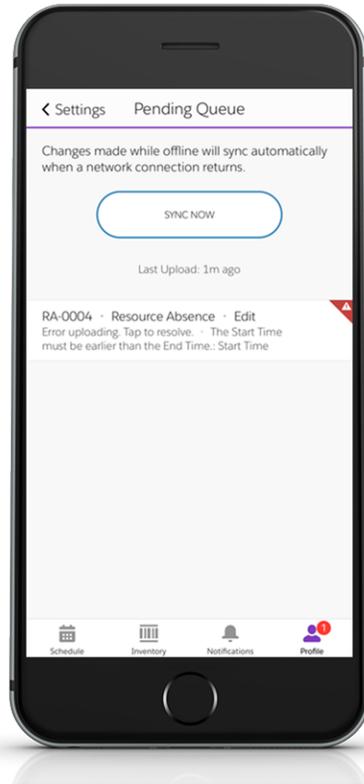
Offline-Mode Considerations

If your technicians sometimes work without internet access for a prolonged period, here are some useful tips to consider.

- Set the calendar range for your users to include the entire schedule of work that your technicians need while offline.
- When working offline, sometimes a data conflict can occur. Manual conflict resolution is required if Salesforce rejects data uploads for any reason. You can resolve conflicts from the pending upload queue by fixing the conflict then syncing with Salesforce.

EDITIONS

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Offline Data Limitations For The Field Service Lightning Mobile App

Learn about the data priming rules for working without network connectivity in the Field Service Lightning mobile app.

Data Accessibility From Offline Mode

The Field Service Lightning mobile app can be used without network connectivity with almost complete functionality. However, the app first needs to load record data to cache for the user to work from while they are in offline-mode. The process of caching this data for use from offline-mode is called data priming, and is done automatically when a user logs in to the app with a network connection.

The data that is primed to a user's device is determined by the records that are on their schedule. A user's schedule is defined either by a listview or the calendar range of the user's schedule, as determined by your admin. Since Field Service Lightning is built around the Work Order object, these records have the most robust offline functionality, while other records have certain limitations while working from offline mode.

EDITIONS

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Table 6: Offline Data Priming By Object (Record Type)

Objects	The Field Data of the Record	The Field Data of Associated Records	Quick Actions	Related Lists	Related Files	Chatter Feed
Work Order & Work Order Line Item	Yes	Yes	Yes	Yes	Only Metadata ¹	Yes
Service Appointment	Yes	Yes	Yes	Yes	No	No
Case	No ²	No	Yes	No	Yes	Yes
Any Other Record	No ²	No	Yes	No	No	No

¹ While data refers to the information stored in the fields of a record, metadata contains data about the record itself such as its page layout, search layout, relevant workflow rules.

² The data for other records isn't primed unless the records are associated with a Work Order, Work Order Line Item, or Service Appointment, or case that is also primed.

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