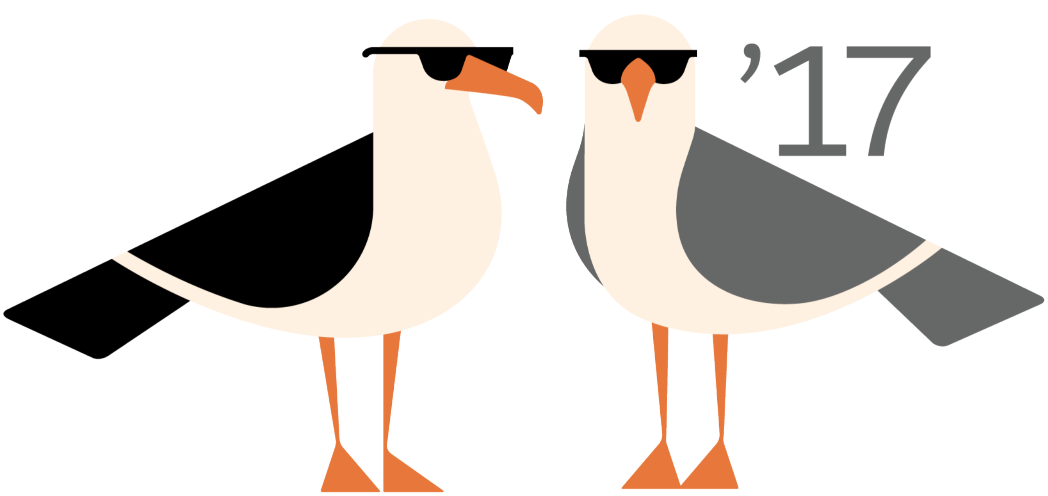
salesforce

Complete Guide to Field Service

Salesforce, Summer ’17



@salesforcedocs

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FIELD SERVICE LIGHTNING

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field Service Lightning is a powerful set of features that lets you set up and customize a mobile-friendly field service hub in Salesforce.

Running a field service business means managing a lot of moving parts. With Field Service Lightning, you get the tools you need to manage work orders, service resources, and scheduling. Here are some of the things you can do.

- Create service resource records that represent your field service technicians, and add details about their skills, service territories, and availability
- Set up multi-level service territories that represent the regions where your technicians can work
- Track your product inventory and service vehicle location
- Schedule one-time or recurring appointments for customers, and add details about technician preference and required skills
- Create maintenance plans and templates to standardize your business' field service tasks
- Generate service reports to keep customers informed about service progress

What's Included in Field Service Lightning

When Field Service Lightning is enabled, you gain access to a suite of standard objects that you can find in Setup and as tabs in Salesforce.

If you need advanced scheduling capabilities, download the Field Service Lightning managed package. The managed package builds on the standard objects and includes:

- 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 appointments
- Out-of-the-box scheduling policies and triggers that help you customize your scheduling model and display preferences

Ready to get started? The following resources will help you stay organized.

SET UP FIELD SERVICE LIGHTNING

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

1. Enable Field Service Lightning
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2. Give Users Access to Field Service Lightning
   To give your team access to Field Service Lightning features, assign the necessary object permissions to users.
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   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.
4. Create Operating Hours
   Define operating hours and assign them to service territories, service territory members, or accounts to indicate their field service hours.
5. 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.
6. 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.
7. Set Up Time Sheets
   Track how much time your field service employees are spending on tasks.
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 Preventive Maintenance
   An ounce of prevention is worth a pound of cure. Keep your business and your customers up and running with preventive maintenance plans.
10. Set Up Locations for Field Service
    Your field service locations can be vans, warehouses, customer sites, or whatever suits your organization. Learn how to create service locations and track their consumption and availability.
11. 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.
12. Set up Part Requests and Transfers
    Ensure your mobile workforce has the right parts in stock to get the job done every time. Manage your inventory and all transfers throughout a part's life cycle. Track movements from requests to customer. Whether the parts are transferred from the warehouse to the customer or between technicians, your field service center has it covered.

13. [Set Up 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.
14. [Report on Field Service Lightning]
    Create report types to track field service activity 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**.

   Note: If you don't have a Field Service Lightning add-on license, you just see an **Enable Work Orders** option, which is on by default.

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.

Note: Enabling Field Service Lightning turns on geocoding (location data) for supported features. To learn more, see Location Tracking in Field Service Lightning.

EDITIONS

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

USER PERMISSIONS

To enable Field Service Lightning:
- "Customize Application"

Give Users Access to Field Service Lightning

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access field service objects:
- "Field Service Standard"

To assign a permission set license:
- "Manage Users"

To create a permission set:
- "Manage Profiles and Permission Sets"

To give your team access to Field Service Lightning features, assign the necessary object permissions to users.

Important: Field Service Lightning must be enabled in your org before you can manage field service object permissions.

All users need the "Field Service Standard" user permission to access field service objects. Most user licenses already include this permission; for the full list of licenses, contact Salesforce Support.

Field Service Lightning also includes three permission set licenses:

- Dispatchers need the Field Service Dispatcher permission set license to access the dispatcher console
- Technicians need the Field Service Scheduling permission set license to be included in scheduling and optimization
- Mobile users (typically technicians) need the Field Service Mobile permission set license to use the Field Service Lightning mobile app

You don't need a permission set license to access field service objects. For example, inventory managers, admins, and customer support agents probably don't need one.

To give users access to field service features:

1. Create a permission set for each of the three Field Service Lightning permission set licenses.
   a. From Setup, enter *`Permission Sets`* in the Quick Find box, then select **Permission Sets** under `Manage Users`.
   b. Click **New**.
   c. Enter a label, API name, and description for your permission set. To keep it simple, use the same name as the permission set license you plan to associate it with.
   d. Under `Select the type of users who will use this permission set`, select the corresponding Field Service Lightning permission set license.
   e. Click **Save**.
   f. On the permission set overview page, under `System`, click **System Permissions**.
   g. Click **Edit**.
   h. Enable the corresponding Field Service Lightning permission set license (Field Service Scheduling, Mobile, or Dispatcher).
   i. Click **Save**.
2. On the permission set overview page, assign the permission set to relevant users. Assigning a permission set automatically assigns the associated permission set license to the user.
3. Update all relevant user profiles to include access to field service objects.
   a. In Setup, navigate to the profile you want to update and click **Edit**.
   b. Under Administrative Permissions, select `Field Service Standard`.
   c. Click **Save**.
   d. Under Standard Object Permissions on the profile, define the access level to field service objects.

      Tip: For a full list of field service objects, see Field Service Lightning Objects.

e. Click **Save**.

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

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Configure Service Territory Settings

Control how your users work with service territories.

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit page layouts and set field history tracking:
- "Customize Application"

To create and edit users:
- "Manage Internal Users"

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.

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 versus field service. Service territories can also be organized into hierarchies to reflect parent and child relationships.

EDITIONS

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USER PERMISSIONS

To create service territories:
- "Create" on service territories

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 Create Operating Hours.

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 resources yet, know that you can also define a service resource's territories from the resource's detail page.

   Service resources inherit their territory's operating hours by default, but you can define different hours for resources.

   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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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

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.
   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.
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.

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Configure Service Resource Settings

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

EDITIONS

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USER PERMISSIONS

To edit page layouts and set field history tracking:
- "Customize Application"

To create and edit users:
- "Manage Internal Users"

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"

Users Who Will...	Need These Permissions
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.

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

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USER PERMISSIONS

To create service resources:
- "Create" on service resources

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.
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:
      - 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: You must enter a value in at least one of these fields: `Hours per Time Period` and `Work Items per Time Period`. 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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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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.

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

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.

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USER PERMISSIONS

To create skills:
- "Customize Application"

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

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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.

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USER PERMISSIONS

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

- "Edit" on the object

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.

Set Up Time Sheets

Track how much time your field service employees are spending on tasks.

Time sheets relate service resources with their time and attendance. Add the Time Sheets related list to the service resource page and track the resource's time. Service resources add time sheet entries to time sheets. Time sheets may cover a longer period of time (week, month) whereas time sheet entries record specific tasks. Time sheet entries can track individual tasks, travel time, and break time.

EDITIONS

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Configure Time Sheets
Control what you track on service resource time sheets.

Create a Time Sheet
Time sheets relate service resources with their time and attendance.

Configure Time Sheets

Control what you track on service resource time sheets.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit page layouts and set field history tracking:
- "Customize Application"

To create and edit users:
- "Manage Internal Users"

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

1. Customize the Time Sheet Entry page layout.
   a. From Setup, enter `Time Sheet Entry` in the Quick Find box, then select **Page Layouts** under Time Sheet Entry.
   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 Time Sheet Entry page layout.
   d. Click **Save**.
2. Customize the Time Sheet page layout.
   a. From Setup, enter `Time Sheet` in the Quick Find box, then select **Page Layouts** under Time Sheet.
   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 Time Sheet page layout.
   d. Add `Time Sheet Entry` related list to the Time Sheet page layout.
   e. Click **Save**.
3. Add the Time Sheets related list to the service resource page layout.
   a. From Setup, enter `Service Resource` in the Quick Find box, then select **Page Layouts** under Service Resource.
   b. Click **Edit** next to a layout you want to change or click **New** to create one.
   c. Select **Related Lists**.
   d. Drag and drop the `Time Sheets` related list to the Service Resource Layout page layout.
   e. Click **Save**.

Create a Time Sheet

Time sheets relate service resources with their time and attendance.

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

1. From the Time Sheets tab, click **New**.
2. Use the lookup field to enter a service resource within your org.
3. Enter a start and end date for your time sheet.

   If you want to use a different time sheet for each day, enter the same start and end date.
4. In the Time Sheet Entries related list, click **New**.
5. Enter start and end dates and times.

   Note: Time sheet entries are for individual activities; for example, travel, dryer repair, or break. Therefore, the start and end dates are usually the same. Only the time changes.
6. Fill in the rest of the fields according to your needs.
7. Click **Save**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create time sheets:
- "Create" on time sheets

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

Configure Work Order Settings

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit page layouts and set field history tracking:
- "Customize Application"

To create and edit users:
- "Manage Internal Users"

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.
   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

Users Who Will...	Need These Permissions	Permissions Are Auto-Enabled on These Standard Profiles
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.

   a. 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).
   b. 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).
   c. 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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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

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.
   - If a work type with the Auto-Create Service Appointment option selected is added to an existing work order or work order line item, a service appointment is only created for the work order or work order line item if it doesn't yet have one.
   - If someone updates an existing work type by selecting the Auto-Create Service Appointment option, service appointments aren't created on work orders and work order line items that were already using the work type.

5. Optionally, select a service report template. When users create service reports from a work order or work order line item that uses this work type, the reports will use this template.
6. Click **Save**.
7. 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.

8. 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
- 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. 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.

    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. However, if you are using the Field Service Lightning Managed Package, you must enable `Derive the Service Appointment due date from its Work Type` and `Set your default Service Appointment duration to one hour` on the Service Appointment Lifecycle page of Field Service Settings tab.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or clone work orders:
- "Create" on work orders

To create work order line items:
- "Edit" on work orders

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

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:

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create service appointments:
- "Create" on service appointments

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.
- To access assigned resource records, you need access 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.

Service appointments can also be created in other ways:
- You can create them from the Service Appointments tab
- You can opt to have them automatically created on records that list a particular work type. Work types have an **Auto-Create Service Appointment** option which, if selected, auto-creates a service appointment on any work orders or work order line items that use the work type.

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.
- If a work type with the Auto-Create Service Appointment option selected is added to an existing work order or work order line item, a service appointment is only created for the work order or work order line item if it doesn't yet have one.
- If someone updates an existing work type by selecting the Auto-Create Service Appointment option, service appointments aren't created on work orders and work order line items that were already using the work type.

Set Up Preventive Maintenance

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

An ounce of prevention is worth a pound of cure. Keep your business and your customers up and running with preventive maintenance plans.

To prevent product breakdowns, generate work orders and service appointments based on your product and window for maintenance so your customers never miss a beat. Define maintenance plans on assets and Field Service Lightning generates work orders and service appointments automatically.

A maintenance plan has start and end dates, determines how frequently maintenance occurs, and allows you to automatically generate future work orders. It can relate to clients (accounts), work types, service contracts (only available in Salesforce Classic), and maintenance assets. A maintenance asset is a part or product covered by the maintenance plan. The maintenance asset related list, on the maintenance plan object, lists all assets related to the maintenance plan.

Note: To generate work orders, you must have read access to assets and work types.

Configure Preventive Maintenance

Control how your preventive maintenance works.

Create a Maintenance Plan

Create preventive maintenance plans to set start and end dates, determine how frequently maintenance occurs, and automatically generate work orders. You can also relate your plan to clients (accounts), work types, service contracts (only available in Salesforce Classic), and maintenance assets.

Configure Preventive Maintenance

Control how your preventive maintenance works.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit page layouts and set field history tracking:

- "Customize Application"

To create and edit users:

- "Manage Internal Users"

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

1. Customize the maintenance plan page layout.
   a. From Setup, enter `Maintenance Plan` in the Quick Find box, then select **Page Layouts** under Maintenance Plan.
   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 Maintenance Plan page layout.
   d. Add the Maintenance Assets related list to the Maintenance Plan page layout.
   e. Click **Save**.
2. Make the Maintenance Plans tab visible to your users.
   Users create and manage maintenance plans from the Maintenance Plans tab. You can add the tab to a custom app or instruct users to add it in Salesforce.

   Note: To generate work orders on a maintenance plan, users must have read access to assets and work types.
3. Customize the Maintenance Asset page layout.
   a. From Setup, enter `Maintenance Asset` in the Quick Find box, then select **Page Layouts** under Maintenance Asset.
   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 Maintenance Asset page layout.
   d. Click **Save**.

Create a Maintenance Plan

Create preventive maintenance plans to set start and end dates, determine how frequently maintenance occurs, and automatically generate work orders. You can also relate your plan to clients (accounts), work types, service contracts (only available in Salesforce Classic), and maintenance assets.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create maintenance plans:
- "Create" on maintenance plans

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

1. From the Maintenance Plans tab, click **New**.
2. If available, use the lookup fields to enter a work type, an account, and a service contract.
3. Enter a start date.
4. Enter the date of the first work order in the next batch.

   This is the suggested date of service for the work order, not the date the work order is created.
5. In the `Frequency` field, enter how often you need a work order created. In the `Frequency Type` field, select the unit of frequency.

   For example, if you need a work order every month, enter 1 and select Month.
6. In the `Generation Timeframe` field, enter how far in advance you want to generate work orders in each batch. In the `Generation Timeframe Type` field, select the unit of timeframe.

   For example, if you need work orders for six months, enter 6 and select Month.

   Note: To generate work orders on maintenance plans, you must have "Read" access to assets and work types, and "Create" access to work orders and service appointments.
7. Fill in the rest of the fields according to your needs.
8. Click **Save**.

Example: If you have a maintenance plan with two assets that need service every month (frequency) and you generate your work orders six months in advance (generation timeframe), each time you generate work orders, 12 work orders are created (six for each asset).

Note: You can't generate more than 2,500 work orders at a time. You can decrease the number of work orders generated by making one of the following changes:

- Increasing the frequency
- Decreasing the generation timeframe
- Removing assets from the maintenance plan

Set Up Locations for Field Service

Your field service 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

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 toolbox. 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.

USER PERMISSIONS

To edit page layouts and set field history tracking:
- "Customize Application"

To create and edit users:
- "Manage Internal Users"

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.

   You can set up multiple addresses and address types. For example, a customer's shipping address may be different from their 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 the Addresses related list.
   d. Click **Save**.

3. Customize the `Associated Locations` page layout.

   Associated locations allow you to 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 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**.
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. If product items will be stored at the location, check `Inventory Location`.
5. If this location is 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**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create locations:
- "Create" on locations

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

Configure Parts and Van Stock Settings

Control how your users work with parts and van stock.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit page layouts and set field history tracking:
- "Customize Application"

To create and edit users:
- "Manage Internal Users"

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 on work orders or work order line items tracks parts needed for a particular type of work.
- The Consumed Products related list on work orders or work order line items tracks parts used to complete the work.
- The Product Item Transactions related list on product items tracks the use and restocking of a 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 the 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**.

5. Customize the Products Consumed page layout.
   a. From Setup, enter `Products Consumed` 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 the Products Consumed and Products Required related lists to the Work Order and Work Order Line Item page layouts.
   For details about work order user permissions, see Configure Work Order Settings.
7. Customize the Product Item Transactions page layout.
   a. From Setup, enter `Product Item Transactions` 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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create product items:
- "Create" on product items

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

1. From the Product Items tab, click **New**.
2. Use the lookup field to enter a product name within your org.
   To add products to your org, see Guidelines for Creating Products.
3. Use the lookup field to enter a location within your org.
   To add locations to your org, see Create Field Service Locations.
4. Enter the amount at this location in `Quantity on Hand`.
   Note: If you want 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**.

Set up Part Requests and Transfers

Ensure your mobile workforce has the right parts in stock to get the job done every time. Manage your inventory and all transfers throughout a part's life cycle. Track movements from requests to customer. Whether the parts are transferred from the warehouse to the customer or between technicians, your field service center has it covered.

Inventory management in Field Service Lightning starts with a product request. Technicians or mobile workers can make requests when they find defective parts in their trucks or their stock has run out. Dispatchers or service managers can create part requests for their technician's inventory location when they see the stock getting low. And schedulers can create part requests when they schedule work orders needing specific parts not normally in a technician's van stock.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Configure Part Requests and Transfers
Control how your users request and transfer parts.

Create Part Requests and Transfers
Request parts for work orders and service appointments or to replenish van stock.

Configure Part Requests and Transfers

Control how your users request and transfer parts.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit page layouts and set field history tracking:
- "Customize Application"

To create and edit users:
- "Manage Internal Users"

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

Part Requests and Transfers consist of the Product Request, Shipment, and Product Transfer objects and the Product Request Line Items related list.

- A Product Request represents an order for a part or parts.
- A Product Request Line Item represents an ordered part.
- A Shipment tracks the part while it is in transit.
- A Product Transfer records the part's transfer to its new location.

1. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	"Customize Application"
View the Product tab	"Read" on products
View the Product Requests, Shipments, and Product Transfers tabs	"Read" on each object
Create or clone product requests	"Create" on product requests

2. Customize the Product Request page layout.
   a. From Setup, enter `Product Request` in the Quick Find box, then select **Page Layouts** under Product Request.
   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 Request page layout.

d. Add the Product Request Line Items and Product Transfers related lists to the Product Request page layout.
e. Click **Save**.

3. Make the Product Requests, Product Request Line Items, Shipments, and Product Transfers tabs visible to your users.
You can add the tabs to a custom app or instruct users to add them in Salesforce.
4. Customize the Product Request Line Items page layout.
    a. From Setup, enter `Product Request Line Items` in the Quick Find box, then select **Page Layouts** under Product Request Line 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 Request Line Items page layout.
    d. Click **Save**.
5. Customize the Shipments page layout.
    a. From Setup, enter `Shipments` in the Quick Find box, then select **Page Layouts** under Shipments.
    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 Shipments page layout.
    d. Click **Save**.
6. Customize the Product Transfers page layout.
    a. From Setup, enter `Product Transfers` in the Quick Find box, then select **Page Layouts** under Product Transfers.
    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 Transfers page layout.
    d. Click **Save**.

Create Part Requests and Transfers

Request parts for work orders and service appointments or to replenish van stock.

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

1. From the Product Requests tab, click **New**.
2. If available, use the lookup field to enter a work order.
3. Use the lookup field to enter a location within your org.
To add locations to your org, see Create Field Service Locations.
4. Fill in the rest of the fields according to your needs.

    Note: You can create a new product transfer from the Product Transfers related list on a product request. However, the product request isn't automatically associated. To associate it, select the corresponding product request line item from the drop-down list of the Product Request Line Item field. You can't create product transfers for product items with serial numbers.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create part requests:
- "Create" on part requests

Set Up 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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Configure Service Report Settings
Control what information your service reports contain.

Create a Service Report
Create service reports that provide your customers with summaries of their work orders, work order line items, and service appointments.

Configure Service Report Settings

Control what information your service reports contain.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit page layouts and picklist values:
- "Customize Application"

To create service report templates:
- "Create" on service report templates

  AND

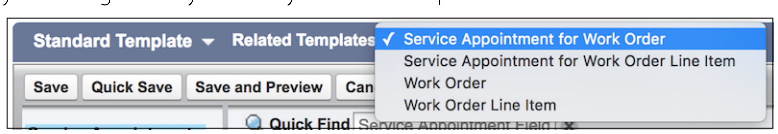
  "View Setup"

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

1. Create service report templates.
   a. From Setup, enter `Service Report` in the Quick Find box, then click **Service Report Templates** under Field Service.
   b. Click **New**, or click **Edit** next to a report template you'd like to adjust. You already have one template named Standard, which is active by default.
   c. If you are creating a template, select an existing template as its base and give it a name.
   d. On the Service Report Template create page, drag and drop fields in the appropriate sections.

      Note: Each template comes with four sub-templates, which allow it to be used for service reports on multiple types of records:
      - Service Appointment for Work Order
      - Service Appointment for Work Order Line Item
      - Work Order
      - Work Order Line Item

      The drop-down menu at the top of the page lists the sub-template that you're currently editing. We recommend customizing all four sub-templates for each template so you feel comfortable that your service reports contain the proper information. Save your changes after you modify each sub-template.



   e. 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.

f. Click **Activate** next to the template name on the Service Report Templates home page. You can only create service reports from active templates. If no templates are active, the **Create Service Report** button isn't visible.

2. Add the **Create Service Report** button to page layouts for the following objects:
   - Work orders
   - Work order line items
   - Service appointments

   Important: If the person creating the service report doesn't have "view" permission on certain objects or fields in the service report template, those fields won't appear on the report they create.

Create a Service Report

Create service reports that provide your customers with summaries of their work orders, work order line items, and service appointments.

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** in the action drop-down menu.

   Tip: If you don't see this action, it may need to be added to the page layout, or your org may not have any active service report templates. Ask your Salesforce admin for help.

2. Use the lookup to find the template you'd like to use.
3. Click **Create PDF**.

   The service report preview displays.

4. To save the service report to the record, click **Create Service Report**. To save the report to the record and send a copy to the customer, click **Create and Send Service Report**. Then, fill out the email fields and click **Send**.

   The service report is saved in the Service Reports related list on the record.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create service reports:
- "Create" on service reports

Report on Field Service Lightning

Create report types to track field service activity 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
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	Service Appointments Skill Requirements

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features and managed package are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. 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
	view service appointments and skill requirements associated with work order line items.	
Work Types	Compare information such as work type duration and skill requirements.	Skill Requirements
Accounts	Compare accounts' resource preferences and work orders.	*Field service objects:* Resource Preferences Work Orders
Assets	Compare the number and characteristics of work orders associated with assets.	*Field service objects:* Work Orders
Cases	Compare the number and characteristics of work orders associated with cases.	*Field service objects:* Work Orders
Contacts	Analyze the service appointments and work orders associated with contacts.	*Field service objects:* Service Appointments Work Orders
Entitlements	Compare the number and characteristics of work orders associated with entitlements.	*Field service objects:* Work Orders
Service Contracts	Compare the number and characteristics of work orders associated with service contracts.	*Field service objects:* 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 Objects

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

When you enable Field Service Lightning, you gain access to a suite of standard Salesforce objects.

Note: This list doesn't include sharing, feed, or history objects.

Object Name	Definition	Tab in Salesforce?
Address	Address associated with a location.	
App Extension	Link between the Field Service Lightning mobile app and other mobile apps.	
Asset Relationship	A relationship between two assets that represents a replacement, an upgrade, or a crossgrade.	
Assigned Resource	Service resource who is assigned to a service appointment.	
Associated Location	Location linked to a specific account.	
Digital Signature	Lets you capture signatures from customers or technicians for completed work.	
Field Service Mobile Settings	Represents a collection of settings related to the Field Service Lightning mobile app.	
Linked Article	Knowledge article that is attached to a work order or work order line item.	
Location	Warehouse, site, van, or plant where products items are stocked or used.	✓

Object Name	Definition	Tab in Salesforce?
Maintenance Asset	Asset associated with a particular maintenance plan. The plan's work orders list the asset associated with it.	
Maintenance Plan	Plan for preventative maintenance on assets. Work orders are automatically generated for all maintenance visits.	✓
Operating Hours	Field service hours that you can define for service territories, service resources, and accounts.	✓
Product Consumed	A product that was used to complete a work order or work order line item.	
Product Item	A specific instance of a product. You can associate product items with locations, log requests, and mark them as transferred or consumed.	✓
Product Item Transaction	Used to track the restocking, consumption, or stock adjustment of a product item.	
Product Request	A part or part that has been ordered.	✓
Product Request Line Item	A subdivision of a product request, often representing smaller components.	✓
Product Required	A product that is required for the completion of a work order or work order line item.	
Product Transfer	The transfer of a product from one inventory to another.	✓
Resource Absence	A time period in which a service resource is unavailable to work.	
Resource Preference	The designation of a service resource as preferred, required, or excluded on specific accounts or work orders.	
Service Appointment	An appointment to perform field service work for customers.	✓
Service Report	A customer-facing report summarizing the status of a service appointment, work order, or work order line item.	
Service Report Template	Templates for service reports.	
Service Resource	A user who can perform field service work. You can assign resources to service appointments and specify each resource's skills, service territory, and availability.	✓
Service Resource Capacity	The maximum number of scheduled hours or number of service appointments that a capacity-based service resource can complete within a specific time period.	
Service Resource Skill	A skill assigned to a service resource. You can specify skill level and expiration.	
Service Territory	A region in which field service can be performed. You can assign service resources to territories and create territory hierarchies.	✓

Object Name	Definition	Tab in Salesforce?
Service Territory Location	A location associated with a particular service territory.	
Service Territory Member	A service resource who is assigned to a particular service territory.	
Shipment	Used to track a product item while it is in transit between locations.	✔
Skill Requirement	A skill that is required to complete a particular field service task. Skill requirements can be added to work types, work orders, and work order line items.	
Time Sheet	A record used to track a service resource's time and attendance.	✔
Time Sheet Entry	A period of time in which a service resource performs a specific function.	
Time Slot	A period of time on a specified day of the week during which field service work can be performed. Operating hours consist of one or more time slots.	
Work Type	A template that helps you standardize your work orders.	✔

The following objects are available whether or not Field Service Lightning is enabled. You'll likely encounter them when completing field service tasks.

Object Name	Definition	Tab in Salesforce?
Asset	A purchased or installed product.	✔
Product	A product or service that your business sells.	✔
Skill	A capability needed to perform tasks.	✔
Work Order	A record that tracks work to be performed for customers. Work orders can have their own service appointments and work order line items.	✔
Work Order Line Item	A subdivision of a work order, often representing tasks to be completed.	

Field Service Lightning Limits and Limitations

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

Communities

You can add the following Field Service Lightning objects to communities built using the Salesforce Tabs + Visualforce template:

- Work orders
- Work order line items
- Service appointments

Make sure to double-check which fields are visible in your communities so customers only see the information you want them to see.

Service Reports

Service reports can't be deleted in Lightning Experience. To delete a service report, switch to Salesforce Classic.

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.
  - 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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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
`Latitude`	The latitude of the street address.
`Longitude`	The longitude of the street address.
`GeocodeAccuracy`	The accuracy of the latitude and longitude. This field contains one of the following values, listed in order from most to least accurate: • `Address`—In the same building • `NearAddress`—Near the address • `Block`—Midway point of the block • `Street`—Midway point of the street • `ExtendedZip`—Center of the extended zip code area • `Zip`—Center of the zip code area • `Neighborhood`—Center of the neighborhood • `City`—Center of the city • `County`—Center of the county • `State`—Center of the state • `Unknown`—No match for the address was found (for instance, the address is invalid)

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.

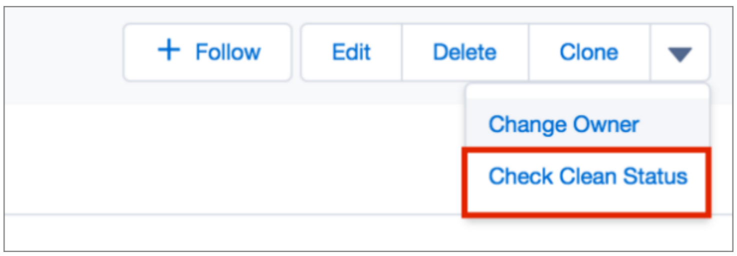
- *If you're using Salesforce Classic:*

  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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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
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.	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 `Completed` and creates a second service appointment on the work order to install the replacement part. 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 `Completed`.

Situation	How to Use Work Orders to Address the Situation
	6. The agent closes the case.
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.	**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 `Completed`. When all line items are complete, the resource changes the status of both the service appointment and its parent work order to `Completed`. **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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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.

Work Order Field	What It Represents
`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.
`List Price`	(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. 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.
`Product`	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: • `List Price` • `Unit Price` • `Subtotal` • `Total Price`

Work Order Line Item Field	What It Represents
	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.
`Unit Price`	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.

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**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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;
            }
        } 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 ca1 = [SELECT Status from Case where id= :ca.Id];
        System.assertEquals('Closed', ca1.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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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

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.

Guidelines for Using Service Resources

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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

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.

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.

To access assigned resource records, you need access to service appointments.

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.

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

To create, edit, and delete work order line items:	Edit on work orders

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
Step 1. Ensure you have all original seven status categories	If you have deleted or changed the original status values, recreate status until you have all seven: • *`New`*—Work order 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. Note: Your default setup may have hidden status categories. You must also create new status values for those status categories.
Step 2. For each status value, create a new "dummy" status value with a modified name and an appropriate status category.	If you have a status value of `Completed`, create an additional status value with these settings: • Name: *`Completed_1`* • Status Category: `Completed` 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 `Completed` status value so its status category is `Completed`.
Step 4. To keep things tidy, delete the dummy value.	Delete the `Completed_1` 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 Report on Field Service Lightning.

> 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.

Generate Work Orders on Maintenance Plans with Apex

The **Generate Work Orders** action on maintenance plans can also be called using Apex code. The following code sample creates work order records by making an Apex callout to the `generateWorkOrder` action REST API resource.

You can use this code sample in several different ways:

- Add it to Apex controller code for a Lightning component, and tie it to a custom UI or app functionality
- Use it in an Apex trigger to semi-automate the creation of the work orders (for example, whenever a maintenance plan is created or updated)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Use it in an Apex REST service to create work orders when called from an external integration service

Note:

- This code sample assumes that you have remote site settings enabled to make REST callouts. For more information, see Adding Remote Site Settings.
- The mock maintenance plan ID in the code sample is *1MPR000000000Bu*.

```
String salesforceHost = System.Url.getSalesforceBaseURL().toExternalForm();
String url = salesforceHost + '/services/data/v40.0/actions/standard/generateWorkOrders';

// Create HTTP request
HttpRequest request = new HttpRequest();
request.setEndpoint(url);
request.setMethod('POST');
request.setHeader('Content-Type', 'application/json;charset=UTF-8');
request.setHeader('Authorization', 'OAuth ' + UserInfo.getSessionId());
// Set the body as a JSON object
request.setBody('{"inputs" : [{"recordId" : "1MPR000000000Bu"}]}');
Http http = new Http();
HttpResponse response = http.send(request);
// Parse the JSON response
if (response.getStatusCode() != 201) {
    System.debug('The status code returned was not expected: ' +
        response.getStatusCode() + ' ' + response.getStatus());
} else {
    System.debug(response.getBody());
}
```

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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

Viewing Service Appointments

View service appointments on the Service Appointments tab. Related service appointments also appear in the Service Appointments related list on work orders, work order line items, and service resources.

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.

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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

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

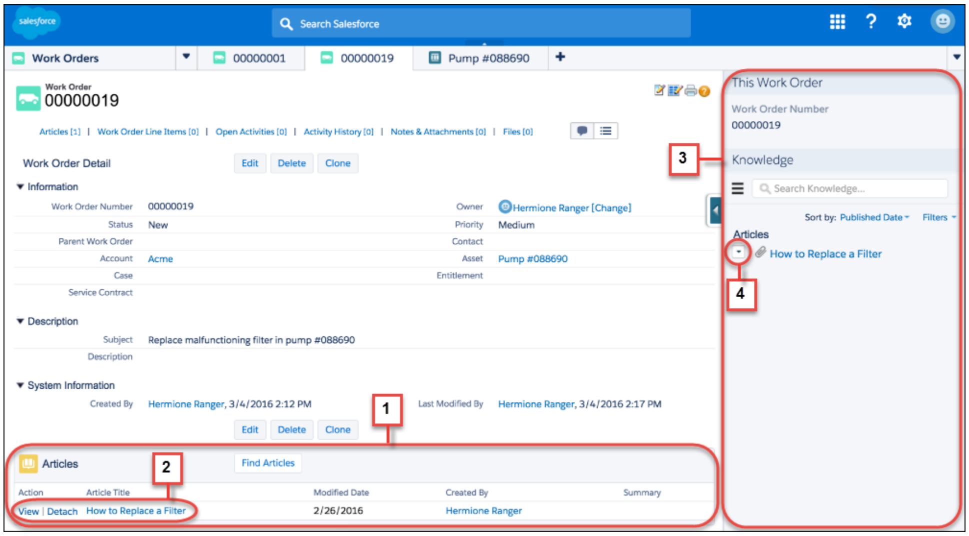
If an article is out of date, you can publish a new version by navigating to the article and clicking **Edit**.

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.



(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.

[Part Request and Transfer Fields](#)
Product requests, product request line items, shipments, and product transfers have the following fields. Some fields might not be visible or editable depending on your page layout and field-level security settings.

[Service Report Fields](#)
Service reports 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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Service Territory

Service territories represent regions in which field service work can be performed.

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 *`Northern California`* territory can have a *`State of California`* territory as its parent.
`Top-Level Territory`	(Read only) The top-level territory in a hierarchy of service territories. Depending on where a

Field Name	Description
	territory lies in the hierarchy, its top-level territory might be the same as its parent.

Service Territory Member

Service territory members are service resources who are available to work in the service territory.

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.
`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`	Primary, Secondary, or Relocation. • 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. For example, a service resource might have the following territories: • Primary territory: *`West Chicago`* • Secondary territories: – *`East Chicago`*

Field Name	Description
	– *South Chicago* • Relocation territory: *Manhattan*, 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.

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Operating Hours

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.

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: *Summer Hours*, *Winter Hours*, *Peak Season Hours*.
`Time Zone`	The time zone that the operating hours fall within.

Time Slot

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.

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, `Monday 9:00 AM - 10:00 PM`—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.

Field Name	Description
`Type`	The type of time slot. Possible values are `Normal` and `Extended`. You may choose to use `Extended` to represent overtime shifts.

Service Resource Fields

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Service Resource

Service resources are users who can complete field service work.

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.

Field Name	Description
	Note: You can't add additional resource types.
User	The associated user.

Resource Absence

Resource absences are periods of time in which a service resource isn't available to work.

Field Name	Description
Absence ID	(Read only) An auto-generated number identifying the absence.
Absence Type	The type of absence: *Meeting*, *Training*, *Medical*, or *Vacation*. 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.

Resource Capacity

A service resource's capacity indicates how much work the resource can perform in a specified time period.

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. You must fill out this field, the Work Items per Time Period field, or both.
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 Time Period would be *Month* and Hours per Time Period would be *80*.
Work Items per Time Period	The total number of service appointments that the resource can complete per time period. You must fill out this field, the Hours per Time Period field, or both.

Skill Fields for Field Service

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Skill

Skills represent a certification or area of expertise. They are created in Setup.

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

Service resource skills are skills that are assigned to a service resource. They appear in the Skills related list on service resource detail pages.

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 11.
`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 Requirement

Skill requirements are skills that a service 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.

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.

Time Sheets Fields

Time sheets and time sheet entries have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Time Sheet

Time sheets relate service resources with their time and attendance.

Field Name	Description
`Created By`	(Read Only) User who created the time sheet.
`Created Date`	(Read Only) Date the time sheet was created.
`Duration Count`	(Read Only) Total time in minutes logged in related time sheet entries.
`Last Modified By`	(Read Only) User who last modified the time sheet.
`Last Modified Date`	(Read Only) Date the time sheet was last modified.
`Name`	Time sheet name.
`Owner`	Time sheet owner.
`Service Resource`	Service resource associated with the time sheet.
`Status`	The status of the time sheet. The picklist includes the following values, which can be customized: • None • New • Submitted • Approved
`Time Sheet End Date`	The last day the time sheet covers.
`Time Sheet Entry Count`	(Read Only) The number of related time sheet entries.
`Time Sheet Start Date`	The first day the time sheet covers.

Time Sheet Entry

Time sheet entries track the continual time a resource performs a specific function.

Field Name	Description
`Created By`	(Read Only) User who created the time sheet entry.
`Created Date`	(Read Only) Date the time sheet entry was created.
`Description`	A text box for notes on how the time was spent. For example, "This service took longer than normal because the machine was jammed."
`Duration (in Minutes)`	(Read Only) Minutes recorded on the time sheet entry.
`End Time`	The date and time the activity finished.
`Last Modified By`	(Read Only) User who last modified the time sheet.
`Last Modified Date`	(Read Only) Date the time sheet was last modified.
`Name`	Time sheet entry name.
`Start Time`	The date and time the activity began.
`Status`	The status of the time sheet entry. The picklist includes the following values, which can be customized: • None • New • Submitted • Approved
`Subject`	Activity performed; for example, repair, lunch, or travel.
`Time Sheet`	(Read Only) Related time sheet.
`Type`	The type of work performed. The picklist includes the following values, which can be customized: • None • Direct • Indirect
`Work Order`	The work order related to the time sheet entry. Work orders are searchable by their content.
`Work Order Line Item`	The work order line item related to the time sheet entry. Work order line items are searchable by their content.

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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'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 *`Completed`*.
`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 `Duration Type` 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 `Start Date` field (a similar field), see below.
`Entitlement`	The entitlement associated with the work order.

Field	Description
`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 `Longitude` 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 `Latitude` 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.
`Maintenance Plan`	The maintenance plan associated with the work order. When the work order is auto-generated from a maintenance plan, this field automatically lists the related plan.
`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. • 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.

Field	Description
`Postal Code`	The postal code where the work order is completed. Maximum length is 20 characters.
`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: • *Low* • *Medium* • *High* • *Critical*
`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 Appointments`	The number of service appointments on the work order.
`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: • *New*—Work order 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. Changing a work order's status does not affect the status of its work order line items or associated service appointments.
`Status Category`	The category that each status value falls into. The Status Category field has eight default values: seven values which are identical to

Field	Description
	the default `Status` values, and a `None` value for statuses without a status category. 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. 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.
`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.
`Suggested Maintenance Date`	The suggested date that the work order is completed. When the work order is auto-generated from a maintenance plan, this field is automatically populated based on the maintenance plan's settings.
`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 `Duration`, `Duration Type`, 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`*:

1. Create a workflow rule on the Work Order object:
   - Under Evaluation criteria, select **Created**.
   - Under Rule Criteria, enter *`Work Order: Status EQUALS In Progress`*.
2. 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()`.

3. 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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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 *`Completed`*.
`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.
`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.

Field	Description
`Is Closed`	Indicates whether the line item has been closed. Changing the line item's status to `Closed` causes this checkbox to be selected in the user interface.
`Latitude`	Used with `Longitude` 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 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 `Latitude` 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: • *`Low`* • *`Medium`* • *`High`* • *`Critical`*
`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.

Field	Description
`Status`	The status of the line item. The picklist includes the following values, which can be customized: • `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.
`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 `Status` values, and a `None` value for statuses without a status category. 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. 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.
`Subject`	The line item's subject. For example, "Tire Check."
`Subtotal`	The line item's unit price multiplied by the quantity. (Read only)
`Total Price`	The line item's subtotal with discounts applied. (Read only)
`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. Because work order line items must be associated with a work order, this field is required.
`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.

Work Type Fields

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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
`Auto-Create Service Appointment`	Select to automatically create service appointments on work orders or work order line items that use the work type. 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. • If a work type with the Auto-Create Service Appointment option selected is added to an existing work order or work order line item, a service appointment is only created for the work order or work order line item if it doesn't yet have one. • If someone updates an existing work type by selecting the Auto-Create Service Appointment option, service appointments aren't created on work orders and work order line items that were already using the work type.
`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."

Field Name	Description
`Service Report Template`	The service report template associated with the work type. When users create service reports from a work order or work order line item that uses this work type, the reports will use this template.

Service Appointment Fields

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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 `Actual Start` and `Actual End` fields are subsequently updated, the `Actual Duration` field doesn't re-update, but you can manually update it.
`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 is a work order or work order line item.
`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

Field Name	Description
	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.
`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.
`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.

Field Name	Description
`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: • `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. • `Late`The service resource didn't start the job by the scheduled start time.
`Status Category`	The category that each `Status` value falls into. The `Status Category` field has seven values which are identical to the default `Status` values. If you create custom `Status` values, you must indicate which category it belongs to. For example, if you create a *`Customer Absent`* value, you may decide that it belongs in the *`Missed`* 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.
`Subject`	A short phrase describing the appointment.

Maintenance Plan Fields

Maintenance plans and maintenance assets have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Maintenance Plan

Maintenance plans determine how frequently maintenance occurs, and allow you to automatically generate future work orders. They can relate to clients (accounts), work types, assets (creating records known as maintenance assets), and service contracts (only available in Salesforce Classic).

Field Name	Description
`Account`	The account associated with the maintenance plan, searchable by the account's information.
`Contact`	The contact associated with the maintenance plan, searchable by the contact's information.
`Created By`	(Read Only) User who created the maintenance plan.
`Created Date`	(Read Only) Date the maintenance plan was created.
`Date of the first work order in the next batch`	The suggested date of service for the first work order (not the date the work order is created). Once the first batch is run, this field is automatically populated. You can use this field if you need there to be a delay before the first maintenance visit (for example, if monthly maintenance should begin one year after the purchase date).
`Description`	Details not recorded in the provided fields.
`End Date`	The last day the maintenance plan is valid.
`Frequency`	(Required) Amount of time between work orders. The unit is specified in the Frequency Type field.
`Frequency Type`	(Required) The unit of frequency. The picklist includes the following values: • Days • Weeks • Months • Years For example, if you need a work order every month, enter 1 in `Frequency` and select Month for `Frequency Type`.

Field Name	Description
`Generation Timeframe`	(Required) How far in advance work orders are generated in each batch. The unit is specified in the Generation Timeframe Type field.
`Generation Timeframe Type`	(Required) The generation timeframe unit. The picklist includes the following values: • Days • Weeks • Months • Years For example, if you need a work orders for six months, enter 6 and select Months.
`Last Modified By`	(Read Only) User who last modified the maintenance plan.
`Last Modified Date`	(Read Only) Date the maintenance plan was last modified.
`Location`	Where the service takes place.
`Maintenance Plan Number`	(Read Only) An auto-assigned number that identifies the maintenance plan.
`Maintenance Plan Title`	A name for the maintenance plan.
`Maintenance Window End (Days)`	Days after the suggested service date on the work order that the service appointment can be scheduled.
`Maintenance Window Start (Days)`	Days before the suggested service date on the work order that the service appointment can be scheduled.
`Owner`	Maintenance plan owner.
`Service Contract`	The service contract associated with the maintenance plan, searchable by the contract's information. The service contract can't be updated if any child maintenance asset is associated with a contract line item from the service contract.
`Start Date`	The first day the maintenance plan is valid.
`Work Order Generation Status`	(Read Only) Indicates whether the work order generation is in progress or complete. Note: You can't run two batches at the same time. You must wait until the first one is complete.
`Work Type`	The work type associated with the maintenance plan, searchable by the work type's information.

Maintenance Asset

A maintenance asset is a part or product covered by the maintenance plan. The Maintenance Assets related list on the maintenance plan lists all assets related to the maintenance plan. Assets can be associated with multiple maintenance plans.

Field Name	Description
`Asset`	Asset associated with the maintenance plan.
`Contract Line Item`	Contract line item associated with the maintenance asset. This field can only list a contract line item that is associated with the asset, and whose parent service contract is associated with the parent maintenance plan.
`Created By`	(Read Only) User who created the maintenance asset.
`Created Date`	(Read Only) Date the maintenance asset was created.
`Last Modified By`	(Read Only) User who last modified the maintenance asset.
`Last Modified Date`	(Read Only) Date the maintenance asset was last modified.
`Maintenance Asset Number`	(Read Only) An auto-assigned number that identifies the maintenance asset.
`Maintenance Plan`	Maintenance plan associated with the maintenance asset.
`Work Type`	Work type associated with the maintenance asset. The work type is inherited from the maintenance plan when the maintenance asset is created.

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Locations

Locations in field service can be associated with products items to track quantities at the location.

Field Name	Description
`Close Date`	Date the location closed or 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.

Field Name	Description
Inventory Location	Indicates whether the location stores parts. Note: This field must be selected if you want to associate the location with product items.
Location	The geographic location.
Location Type	Picklist of location types. The values are: • Warehouse (default) • Site • Van • Plant
Mobile Location	Indicates whether the location moves. For example, a truck or tool box.
Name	Location name.
Open Date	Date the location opened or 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 remodel construction ended at the location.
Remodel Start Date	Date remodel construction ended at the location.
Time Zone	Picklist of available time zones.
Vistor Address	Lookup to an account's or client's address.

Address

Addresses allow you to set up multiple addresses and address types.

Field Name	Description
Address	Name for the address.
Address Type	Picklist of address types. The values are: • Mailing • Shipping • Billing

Field Name	Description
	• Home
`Description`	A brief description of the address.
`Driving Directions`	Directions to the address.
`Location Type`	Picklist of location types. The values are: • Warehouse (default) • Site • Van • Plant
`Parent`	A lookup field to the parent address. For example, if the address is a billing address, its parents address might be the address of the associated warehouse.
`Time Zone`	Picklist of available time zones.

Associated Location

Associated locations allow you to associate multiple accounts with one location.

Field Name	Description
`Active From`	Date and time the associated location is active.
`Active To`	Date and time the associated location becomes 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 last modified the associated location.
`Last Modified Date`	(Read Only) Date the associated location was last modified.
`Location`	A lookup field to the associated location.
`Name`	(Read Only) Auto-generated number for the association.
`Parent Record`	A lookup field to the parent account.
`Type`	Picklist of address types. The values are: • 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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Product Item

Product items are products associated with a location.

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 last modified the product item.
`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: If you want 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: If you want to enter a serial number, the Quantity on Hand must be 1.

Product Required

Products required are products that are needed to complete a work order or work order line item.

Field Name	Description
`Created By`	(Read Only) User who created the required product.

Field Name	Description
Created Date	(Read Only) Date the required product was created.
Last Modified By	(Read Only) User who last modified the required product.
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.

Product Consumed

Products consumed are products that were used to complete a work order or work order line item.

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 last modified the consumed product.
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 products consumed.
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 Transaction

Product item transactions are actions taken on a product item.

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 last modified the product item transaction.
Last Modified Date	(Read Only) Date the product item transaction was last modified.
Product Item	The associated 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 related product item.
Transaction Type	• 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.

Part Request and Transfer Fields

Product requests, product request line items, shipments, and product transfers have the following fields. Some fields might not be visible or editable depending on your page layout and field-level security settings.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Product Request

Product requests represent a part or parts ordered.

Field Name	Description
Account	The account associated with the product request.
Case	The case associated with the product request.

Field Name	Description
`Created By`	(Read Only) User who created the product request.
`Created Date`	(Read Only) Date the product request was created.
`Description`	Details not recorded in the provided fields.
`Destination Location`	Where the product is delivered.
`Last Modified By`	(Read Only) User who last modified the product request.
`Last Modified Date`	(Read Only) Date the product request was last modified.
`Need By Date`	Date the product must be delivered by.
`Owner`	Product request owner.
`Product Request Number`	(Read Only) An auto-assigned number that identifies the product request.
`Shipment Type`	The type of shipment. The picklist includes the following values, which can be customized: • `None` • `Rush` • `Overnight` • `Next Business Day` • `Pick Up`
`Ship To Address`	The physical address where the product is delivered.
`Source Location`	Where the product is at the time of the request.
`Status`	The status of the shipment. The picklist includes the following values, which can be customized: • `None` • `Draft` • `Submitted` • `Received`
`Work Order`	The work order associated with the product request, searchable by the work order's information.
`Work Order Line Item`	The work order line item associated with the product request, searchable by the work order line item's information.

Product Request Line Item

Product request line items represents an ordered part. They are child records of product requests.

Field Name	Description
`Account`	The account associated with the product request line item.
`Case`	The case associated with the product request line item.
`Created By`	(Read Only) User who created the product request line item.
`Created Date`	(Read Only) Date the product request line item was created.
`Description`	Details not recorded in the provided fields.
`Destination Location`	Where the product is delivered.
`Last Modified By`	(Read Only) User who last modified the product request line item.
`Last Modified Date`	(Read Only) Date the product request line item was last modified.
`Need By Date`	Date the product must be delivered by.
`Parent`	The product request that the line item belongs to.
`Product`	Product associated with the product request line item.
`Product Request Line Item Number`	(Read Only) An auto-assigned number that identifies the product request line item.
`Quantity Requested`	The amount requested.
`Quantity Unit Of Measure`	Units of the requested product; for example, grams, liters, or units. The picklist values can be customized.
`Shipment Type`	The type of shipment. The picklist includes the following values, which can be customized: • `None` • `Rush` • `Overnight` • `Next Business Day` • `Pick Up`
`Ship To Address`	The physical address where the product is delivered.
`Source Location`	Where the product is at time of the request.
`Status`	The status of the shipment. The picklist includes the following values, which can be customized: • `None` • `Draft` • `Submitted` • `Received`
`Work Order`	The work order associated with the product request line item, searchable by the work order's information.

Field Name	Description
`Work Order Line Item`	The work order line item associated with the product request line item, searchable by the work order line item's information.

Shipment

A shipment tracks a product item while it is in transit. It has the following fields.

Field Name	Description
`Actual Delivery Date`	Date the product was delivered.
`Created By`	(Read Only) User who created the shipment tracking.
`Created Date`	(Read Only) Date the shipment tracking was created.
`Delivered To`	The person or entity the product was delivered too.
`Description`	Details not recorded in the provided fields.
`Destination Location`	The place the product is to be delivered.
`Expected Delivered Date`	Date the product is expected to be delivered.
`Last Modified By`	(Read Only) User who last modified the shipment.
`Last Modified Date`	(Read Only) Date the shipment was last modified.
`Owner Name`	Owner of the shipment.
`Ship From Address`	The place the product is coming from.
`Shipment Number`	(Read Only) An auto-assigned number that identifies the shipment.
`Shipping Provider`	The company or person making the transfer.
`Ship To Address`	The address the product is to be delivered.
`Source Location`	The address the product is shipped from.
`Status`	The status of the shipment. The picklist includes the following values, which can be customized: • *`Shipped`*—The product is in transit. • *`Delivered`*—The product is at the source location.
`Tracking Number`	Tracking number for the shipment.
`Tracking URL`	URL of website used for tracking the shipment.

Product Transfer

A product transfer records a part's transfer to its new location. It has the following fields.

Field Name	Description
Created By	(Read Only) User who created the product transfer.
Created Date	(Read Only) Date the product transfer was created.
Description	Details not recorded in the provided fields.
Destination Location	The place the product is to be delivered.
Expected Pickup Date	Date the product is expected to be picked up.
Last Modified By	(Read Only) User who last modified the product transfer.
Last Modified Date	(Read Only) Date the product transfer was last modified.
Owner	Owner of the product transfer.
Product Name	Lookup field for the product associated with the product transfer.
Product	Lookup field for the product request associated with the product transfer.
Product Request Line Item	Lookup field for the product request line item associated with the product transfer.
Quantity Received	Amount of product received at the destination location.
Quantity Sent	Amount of product sent from the source location.
Quantity Unit Of Measure	The units of the product, for example grams, liters, or units.
Received	Checkbox identifying that the product was received.
Received By	Lookup field for the contact who received the product at the destination location.
Shipment	Lookup field for the shipment related to the product transfer.
Shipment Expected Delivery Date	Lookup field for the shipment related to the product transfer.
Shipment Status	Lookup field for the shipment related to the product transfer.
Shipment Tracking Number	Lookup field for the shipment related to the product transfer.
Shipment Tracking URL	Lookup field for the shipment related to the product transfer.
Source Location	Lookup field for the source location related to the product transfer.
Source Product Item	Lookup field for the product item related to the product transfer.
Status	Status of the product transfer.

Service Report Fields

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

Service reports display fields from related objects, including service appointments, work orders, and work order line items. In addition, the Service Report object comes with the following fields.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Field Name	Description
Parent ID	The ID of the record that the service report is summarizing. For example, if you click **Create Service Report** on a service appointment, this field lists the service appointment's record ID.
Service Report Name	The name of the service report.
Service Report Template	The template used to create the service report. Note: If the person creating the service report doesn't have access to certain objects or fields that are included in the service report template, those fields won't be visible in the report they create.

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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`	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. 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. For example, if an article was entitled "How to Replace a Filter" when it was attached to the

Field	Description
	record, this field displays that title and links to the attached version.
`Knowledge Article ID`	The ID of the article that is attached to the record.
`Last Viewed`	The date the article was last viewed.
`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.

FIELD SERVICE LIGHTNING IOS MOBILE APP

The Field Service Lightning iOS 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!

EDITIONS

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

Important: Before you get started, get informed! The Field Service Lightning mobile app upgrades to version 2.0 the week of 7/05/17. You can learn about all the improvements in the Summer '17 release notes. Also, if you don't have an existing field service operation on your org, check out the Field Service Lightning documentation for help getting started:

- Field Service Lightning
- Set Up Field Service Lightning

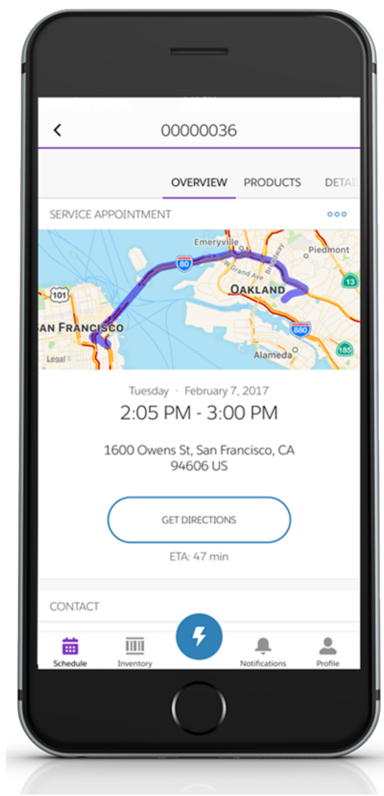


Table 1: Main Features of Field Service Lightning iOS Mobile App

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

Feature	Description
Configurable Quick Actions, Workflows, and Field Service App Extensions	The Field Service Lightning iOS app lets you create actions to meet the unique needs of your mobile work force. **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 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 iOS app and connect it to other apps such as Salesforce1.
Salesforce Knowledge	Integration with Salesforce Knowledge lets knowledge users 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.
Multi-day Appointments	An intuitive UI visualizes multiday jobs. Configure service appointments to span as long as your use case requires.
Product Requests	Easily search for products and request products to wherever they're needed, even mobile locations.
Service Report Previews	Before finalizing a job, your mobile workforce can view a service report preview to check for accuracy and completeness. Offline service reports bear a watermark indicating the possibility that the data in the service report might not be the most current.
Find Work by Location	Your mobile workforce can now easily see find other work orders that share the same location. That way they can complete other jobs while they're in the neighborhood.
Community Users	Members of your Salesforce Community can be given permission to access your field service operation. Including contractors in your mobile workforce has never been easier.

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.

Supported Devices

App Name	Supported Devices	Supported Mobile OS
Field Service Lightning iOS Mobile App	• 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 iOS app.

Salesforce Editions
Field Service Lightning features are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.
User License Types
• 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 iOS app. Create permission set licenses for your Field Service Lightning iOS app users.

Important: The 2.0 update to the Field Service Lightning iOS app has an additional field level security requirement than previous versions. Verify that your users have `"Read"` permission for the `Work Type` field on the Service Appointment object.

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:

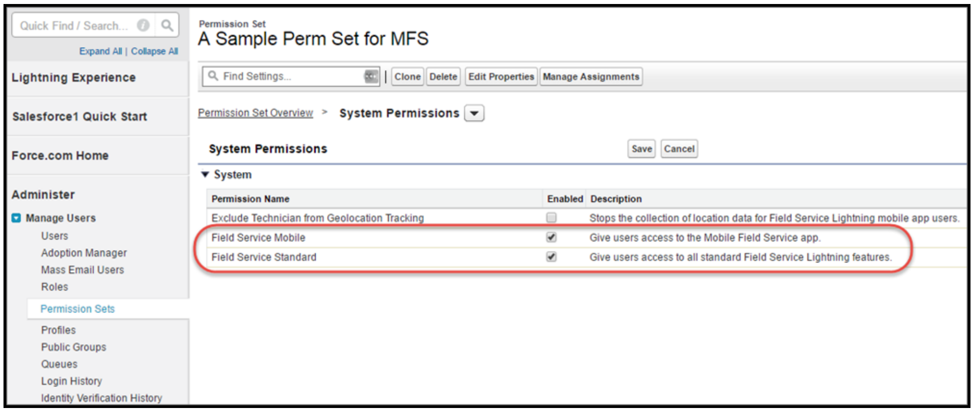
- https://sfdc.co/MobileFieldServicePackage

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 iOS 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
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, Work Type, Service Report
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 users 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.

EDITIONS

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

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 iOS 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 iOS 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 iOS app at any time. To do so, click on your device's **Settings**, then locate the Field Service Lightning iOS 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!

Customize the Field Service Lightning Mobile App

Learn how to customize the Field Service Lightning iOS app to meet your mobile workforce's 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 mobile workforce.

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

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

Empower Your Mobile Workforce with Custom Tailored Workflows

Learn how to use Visual Workflow with the Field Service Lightning iOS 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, you can connect flows to the Field Service Lightning iOS app for your mobile workforce to use.

Configure Service Reports for the Field Service Lightning Mobile App

Learn how to set up service report layouts and how to disallow offline service report generation for your mobile workforce.

Provide Knowledge Articles to Your Mobile Workforce

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

Brand the Field Service Lightning Mobile App

Learn how to give the Field Service Lightning iOS 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 of your mobile workforce's 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 iOS 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 iOS 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 iOS 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 your mobile workforce 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 users need to complete jobs. Track the products consumed by your mobile workforce.

Control the Service Appointment Schedule Screen

EDITIONS

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

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

The Field Service Lightning iOS app loads service appointments that are assigned to the current user. These appointments are first surfaced in the app from the main schedule screen. You can create multiple service appointment list views for your mobile workforce. However, only one service appointment list view can be used as the default list view; records in the default list view are automatically primed to be available even when working without internet access.

If you choose not to set up a service appointment list view, theField Service Lightning iOS 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 list view, like `FieldServiceMobile`. Note the **View Unique Name** because you need to use this name to connect this list view with the Field Service Lightning iOS app.
4. Configure the criteria for your service appointment list view 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 list view. Consider using the fields `Scheduled Start` and `Schedule End` in your filter criteria.
6. Under **Restrict Visibility**, select **Visibile 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 list view 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 iOS 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.

You can load multi-day appointments onto the schedule screen as well. When creating multi-day appointments for your mobile workforce, keep in mind the following considerations:

- Using both the `Scheduled Start` and `Scheduled End` fields on service appointments causes that appointment to appear on the schedule for every day between those two dates and show a visual progress bar representing the job's scheduled completion.

- Setting a service appointment to have a `Scheduled End` time but not a `Scheduled Start` time will cause the appointment to appear on the schedule for every day until the `Scheduled End` date.
- Setting a service appointment to have a `Scheduled Start` time but not a `Scheduled End` time will have that appointment appear on the schedule for every day past the `Scheduled Start` until that appointment is completed.

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

EDITIONS

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

USER PERMISSIONS

To create and modify App Extensions:

- Customize Application

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

You can create app extensions that allow users to pass data from the Field Service Lightning iOS app to another app. App extensions can be created and configured by going to *`Field Service Mobile Settings`* in Setup. 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 iOS 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}**

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.

Dynamic Value Tokens	Description
{!$User.nickName}	The nick name of the user.
{!$User.displayName}	The display name of the user.
{!$User.email}	The email address of the user.
{!$User.firstName}	The first name of the user.
{!$User.lastName}	The last name of the user.
{!$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 iOS 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 iOS app.

Empower Your Mobile Workforce with Custom Tailored Workflows

Learn how to use Visual Workflow with the Field Service Lightning iOS 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, you can connect flows to the Field Service Lightning iOS app for your mobile workforce to use.

EDITIONS

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

USER PERMISSIONS

To create workflows:
- Customize Application

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 `Formula`
- Screens with prespecified validation rules
- Actions in flows cannot rely on the output parameters of an action
- Returning to a previous screen is not allowed during a flow when a loop or subflow is part of 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 is what your users see in the user interface.
4. From the **Type** picklist, select `Flow`.
5. Enter a **Name** that expresses the purpose of the flow.

   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. Because of the unique API name of the service closure flow, you can only have one of these flows configured at a time.

6. 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.

7. Set the **Launch Value** to equal the unique name of your workflow.
8. 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 mobile workforce, 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 pick lists.

Configure Service Reports for the Field Service Lightning Mobile App

Learn how to set up service report layouts and how to disallow offline service report generation for your mobile workforce.

EDITIONS

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

USER PERMISSIONS

To create or edit a Service Report Template:

- Customize Application

> **Important:** Starting with the 2.0 update of the app, the Service Report Related List must be on the Service Appointment page layout in order for the **Service Report** action to display inside the app for your mobile workforce. Deactivating the Standard Template without creating a replacement template prevents users from generating a service report preview.

The Field Service Lightning iOS app uses a service report template to generate service report previews and offline service reports. From setup, you can modify a service report template or create a new one. Think carefully about what fields to include in your service reports.

1. From Setup, type *`Service Report Templates`* into the quick find box, then select **Service Report Templates**.
2. **Edit** the `Standard Template` or create a **New** service report template.
3. Configure the layout of your service report template. You can modify the template for different contexts depending on your use case:
   - Service Appointment for Work Order
   - Service Appointment for Work Order Line Item
   - Work Order
   - Work Order Line Item
4. Click **Save** when your service report template has the desired layout.

By default, the Field Service Lightning iOS app allows users to generate service report previews while offline. Because offline service reports may not have the latest data, they include a watermark indicating that they were generated from offline. However, you can choose to disable offline service report generation altogether. Disable offline service report generation:

1. From Setup, type *`Connected Apps`* into the Quick Find box, and select **Connected Apps**.
2. Click **Salesforce Field Service for iOS**.
3. Find the `Custom Attributes` list and create a **New** custom attribute.
4. Set the `Attribute key` to *`"DISABLE_SERVICE_REPORT_PREVIEW_IOS"`*. Be sure to include the quotation marks.
5. Set the `Attribute value` to *`"true"`*. Be sure to include the quotation marks.

Provide Knowledge Articles to Your Mobile Workforce

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

EDITIONS

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

USER PERMISSIONS

To customize page layouts:
- Customize Application

Salesforce Knowledge lets you create articles to address common questions your users may run into. Integration with the Field Service Lightning iOS app enables admins to serve this custom created content to your mobile workforce 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 iOS 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

1. From Setup, enter `Work Orders` in the Quick Find box and click **Work Orders** > **Page Layouts**.
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 iOS 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 of your mobile workforce's work environments.

EDITIONS

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

USER PERMISSIONS

To customize branding colors:
- Customize Application

The Field Service Lightning iOS 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 iOS 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.

Table 4: Branding Table

Token Name	Description	Default Value
Navbar Background Color	The color of the top bar in the app.	#FCFCFC

Token Name	Description	Default Value
Navbar Inverted	The secondary color of the tap bar in the app.	#000000
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
Feedback Selected	The color indicating the user's current selection.	#803ABE
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
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 iOS 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**.

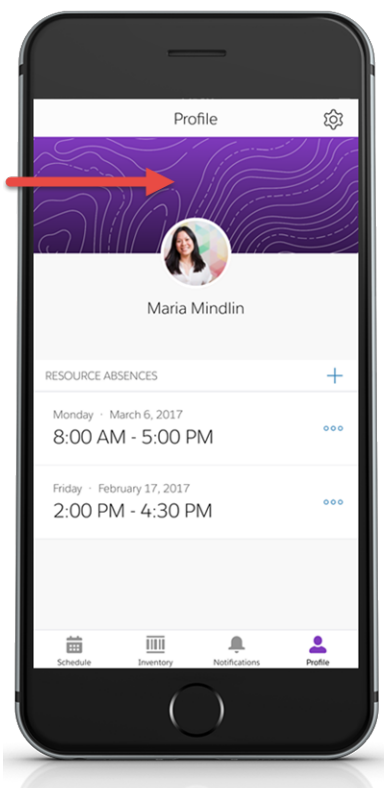
EDITIONS

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

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.**

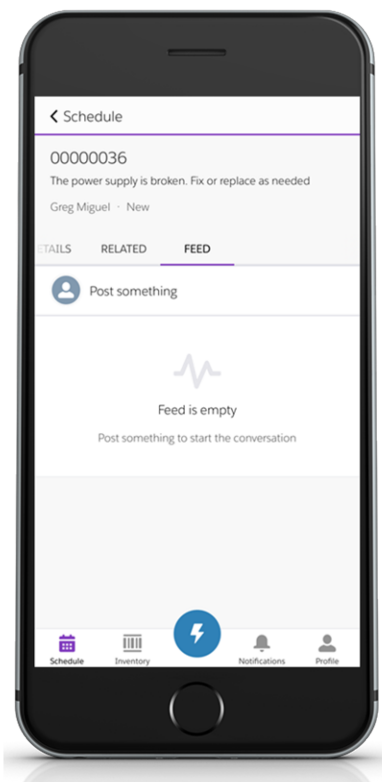
EDITIONS

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

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 iOS 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 iOS 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.

EDITIONS

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

USER PERMISSIONS

To configure resource tracking:
- Customize Application

Configure service resource tracking to have the Field Service Lightning iOS app upload the geolocation of your mobile workforce 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**.

Prominently Display Key Information with Layouts

Use layouts to control how information is displayed in the Field Service Lightning iOS 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.

EDITIONS

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

USER PERMISSIONS

To modify page layouts, search layouts, and compact layouts:
- Customize Application

Control Record Highlights with Compact Layouts

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

EDITIONS

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

USER PERMISSIONS

To modify compact layouts:
- Customize Application

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 remainings 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**.

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 iOS 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.

EDITIONS

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

USER PERMISSIONS

To modify page layouts:
- Customize Application

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.

Control the Schedule Screen with Search Layouts

Control the main schedule screen of the Field Service Lightning iOS app by changing the search layout settings of the service appointment object. Search layouts only control the schedule screen if no service appointment list view is configured for the Field Service Lightning app.

The Field Service Lightning iOS app displays a list of service appointments that are assigned to the user on the schedule screen. This screen is controlled by the settings of the default list view. However, if no list view has been specified as the `Default List View Developer Name` in Setup, then the app will control the layout of the schedule screen using the service appointment search layout. The app prominently displays the top two fields of the service appointment search layout so consider which fields your mobile workforce may want to see from the schedule screen. Many users, 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**.

EDITIONS

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

USER PERMISSIONS

To modify search layouts:
- Customize Application

Empower Users with Quick Actions

Add quick actions to an object's page layouts so your mobile workforce 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 an alternate service closure flow is not configured and the Service Report related list is added to the Service Appointment page layout
- 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.

USER PERMISSIONS

To create quick actions and add them to page layouts:
- Customize Application

Important: The Field Service Lightning iOS app 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 users 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, users 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, users 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.

EDITIONS

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

USER PERMISSIONS

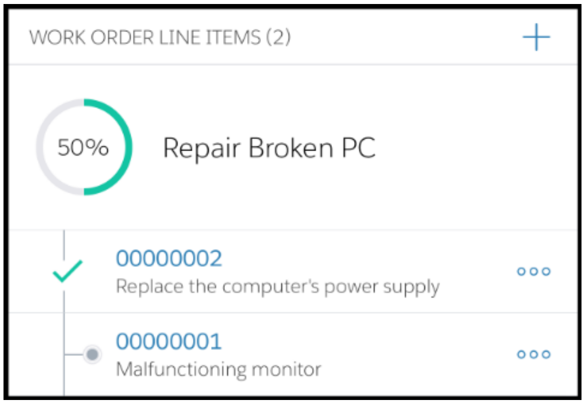
To create quick actions and add them to work order line item page layouts:

- Customize Application

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**.

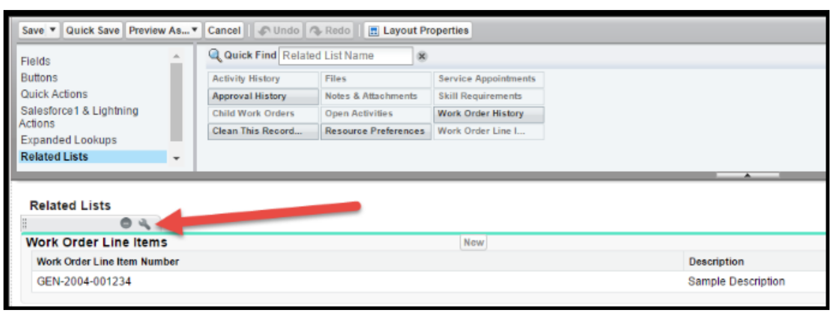
12. Drag and drop your newly created action into the **Quick Actions in the Salesforce Classic Publisher**.
13. Click **Save**.



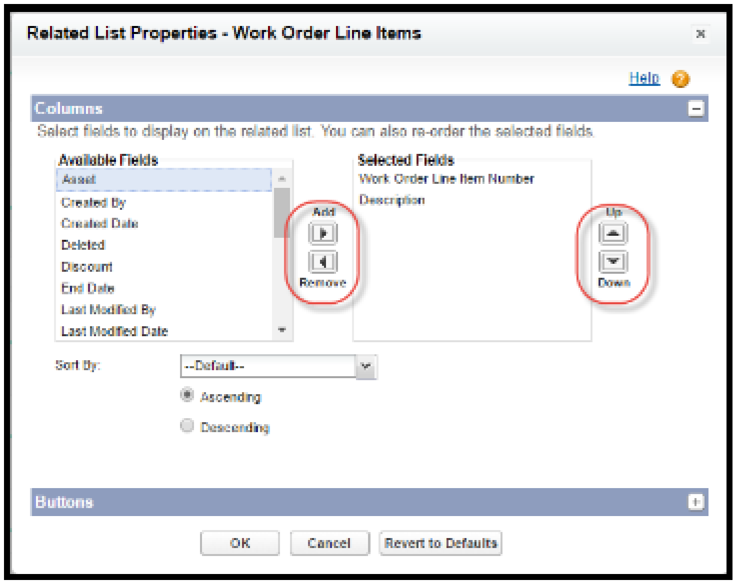
Control Which Fields Are Previewed in the Work Order Line Item Card

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 users need to complete jobs. Track the products consumed by your mobile workforce.

Configure Locations to Track Your Mobile Workforce's Inventories

Learn about tracking products with van locations in the Field Service Lightning iOS app.

Track the Products Your Mobile Workforce Consumes While on the Job

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

Use Products Required To Prepare for Jobs

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

Search for Products in the Field Service Lightning Mobile App

Set up search layouts for products to empower your mobile workforce to search for products and create product requests to have them delivered.

Set Up Product Requests for the Field Service Lightning Mobile App

Empower your mobile workforce to quickly and easily request any items that they need to complete a work order.

Configure Locations to Track Your Mobile Workforce's Inventories

Learn about tracking products with van locations in the Field Service Lightning iOS app.

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

EDITIONS

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

USER PERMISSIONS

To configure locations:
- Customize Application

Create a Location To Represent the Van Stock

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

Tip: Before proceeding with the instructions, verify that the Location object has both the `Mobile Location` and `Inventory Location` fields on the Location page layout. Next, verify that the Service Resource object has the `Location` field on the Service Resource page layout.

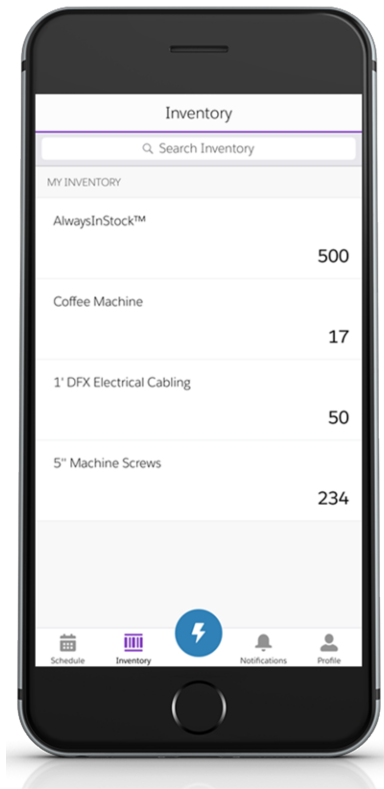
1. From Salesforce, navigate to the **Locations** tab.
2. Create **New** location.
3. If you are creating a location record to represent van stock for your users, be sure to select the **Mobile Location** and **Inventory Location** options.
4. Associate the van location with the service resource who 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 user, 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 users to decrement their van stock when they consume parts, and keep track of the parts required to complete future work.

1. From Salesforce, navigate to the **Product Items** tab.
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 pick list, 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 pick list.

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



Using Price Books To Track Products

It may make sense to add a price book to certain work orders, especially if your field service operation incorporates contractors. Users can search through the price book and log the use or sale of products while on the job.

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 Mobile Workforce Consumes While on the Job

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

Before you can track products consumed by your mobile workforce, 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 vehicles that your mobile workforce 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 Mobile Workforce's Inventories.

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**.

EDITIONS

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

USER PERMISSIONS

To configure products consumed:

- Customize Application

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

Use Products Required To Prepare for Jobs

Learn how to add products required to work orders so your mobile workforce know what they need to bring with them to complete 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 the user needs to have in stock to finish a particular job. Your mobile workforce see a visual indicator on the work order if they have 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 mobile workforce, you can add Products Required from the related list. Setting up van locations for your users allows them 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 a user's van stock has insufficient products to complete the appointment.

EDITIONS

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

USER PERMISSIONS

To configure products required:
- Customize Application

Search for Products in the Field Service Lightning Mobile App

Set up search layouts for products to empower your mobile workforce to search for products and create product requests to have them delivered.

Create a search layout for the product object. The Product Name is always included in the search layout, with up to three additional fields of your choice. When a user searches for a product, the fields that are included in the search layout are included in the search. Consider adding fields to your search layout that help your mobile workforce search for the products they need, such as the `Product Description` and `Product Code` fields. The search terms your users enter are tokenized and searched for across the selected fields in the product search layout.

1. From Setup, type *`Products`* in the Quick Find box and select **Search Layout** for Products.
2. **Edit** the Search Results search layout.
3. Use the `Available Fields` and `Selected Fields` to select and order the fields used in your search layout. The app automatically uses the product name in addition to the top three fields in `Selected Fields`.
4. **Save** your changes.

EDITIONS

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

USER PERMISSIONS

To modify search layout:
- Customize Application

Set Up Product Requests for the Field Service Lightning Mobile App

Empower your mobile workforce to quickly and easily request any items that they need to complete a work order.

Your mobile workers must be associated with a location record to track products before they can create product requests using the Field Service Lightning iOS app. Users also need the **Create** and **Read** permissions on the Product Request object.

Create a global action for Product Requests and add it to the global layout.

1. From Setup, type *Global Actions* in the Quick Find box and select **Global Actions**.
2. Create a **New Action**.
3. Set `Action Type` to *Create a Record*.
4. Set `Target Object` to *Product Request*.
5. Fill in the remaining fields for your global action at your discretion, then click **Save**.
6. From Setup, type *Publisher Layouts* in the Quick Find box and select **Publisher Layouts**.
7. **Edit** the layout that is assigned to your field service users or the Global Layout.
8. Use the layout editor to drag and drop the global action you previously created onto the publisher that corresponds with your user's profile. Click **Save**.
9. From Setup, type *Product Request* in the Quick Find box and select **Buttons, Links, And Actions**.
10. Create a **New Action** which creates a Product Request Line Item.
11. Set `Action Type` to *Create a Record*.
12. Set `Target Object` to *Product Request Line Item*.
13. Fill in the remaining fields for your quick action at your discretion, then click **Save**.
14. Add the Create Product Request Line Item quick action that you previously created to the Product Request page layout.

EDITIONS

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

USER PERMISSIONS

To create quick actions and add them to layouts:

- Customize Application

Push Notifications for the Field Service Lightning Mobile App

Push notifications for Field Service Lightning are a useful way of informing your mobile workforce 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

EDITIONS

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

Notification Triggers

Field Service Lightning iOS 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 mobile workforce 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 an a user 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 your mobile workforce always works with the latest information.

Enable Notifications for the Field Service Lightning Mobile App

Learn how to enable notifications in your org so your mobile workforce always works with the latest information.

You can enable notifications in your org settings so Salesforce sends notifications to relevant users in the Field Service Lightning iOS app, Salesforce1, and Lightning Experience. In the Field Service Lightning iOS 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.

EDITIONS

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

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**.

Give Community Users Access to the Field Service Lightning Mobile App

Including contractors in your field service operation has never been easier. Learn how to give users in your Salesforce Community access to the Field Service Lightning mobile app. Flow actions aren't available to Community users.

You can give members of your Salesforce Community access to the Field Service Lightning iOS app. Just like any other user, they need a license to be able to use the app. They also must be given the permissions in the object permissions table, and have API access.

EDITIONS

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

Table 6: 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, Work Type
Service Resource	Read, Edit	Active, User
Work Order	Read, Create, Edit	

The initial login in as a community user is slightly different in the Field Service Lightning iOS app than it is for standard users. On the initial login screen, community users will need to click the gear in the top right of the screen, then click the **+** to add the URL of your Salesforce community. The URL can be found in Setup under Communities. When inputting the community URL, omit the prefix "https://" in the URL.

Limitations

Flow actions are disabled for Community users.

Field Service Lightning Mobile App Limits and Limitations

EDITIONS

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

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

The Field Service Lightning iOS 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
  - Flow actions aren't enabled for Salesforce Community users.
- 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
- 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. Or, you can go to Setup and search for **Session Settings**, and then change the session settings to `Use POST requests for cross-domain sessions`.
- Salesforce Community users don't have access to flow actions.

Working Offline With the Field Service Lightning Mobile App

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

EDITIONS

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

Offline-Mode Considerations and Limitations

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

EDITIONS

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

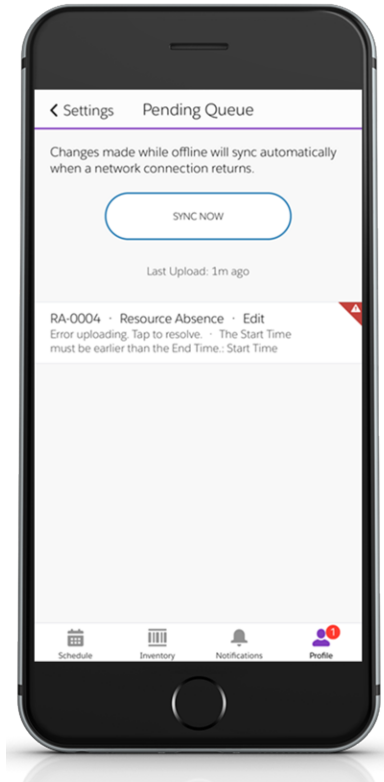
Offline-Mode Limitations

- 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 mobile workforce sometimes work without internet access for a prolonged period, here are some useful tips to consider.

- You can control which records are auotmatically downloaded to the users' schedules by creating a default service appointment list view and linking it to the Field Service Lightning iOS 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. Set the calendar range for your users to include the entire schedule of work that your users need while offline.
- You can only generate service report previews while offline if a service report template has been configured. This template is used to prime the page layout of the service report for offline use.
- 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 addressing the conflict then syncing again with Salesforce.



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

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

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 are 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.

Table 7: 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, and 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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