Complete Guide to Field Service

Salesforce, Winter '18

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FIELD SERVICE LIGHTNING

Field Service Lightning is a powerful, customizable set of features that you can use to set up 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, scheduling, and your mobile workforce. Here are some of the things you can do.

- Create service resources and service crews 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 the location and status of your product inventory, warehouses, service vehicles, and customer sites
- Schedule one-time or recurring appointments for customers, and add details about technician preference and required skills and equipment
- Create maintenance plans and templates to standardize your 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

The offline-friendly Field Service Lightning mobile app for iOS and Android makes work a pleasure for technicians in the field, who can update work orders, track parts, gather customer signatures, and connect with dispatchers from their mobile devices. Download the app from the App Store or Google Play.

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

SET UP FIELD SERVICE LIGHTNING

Set up Field Service Lightning features in the way that best fits your business needs.

1. Enable Field Service Lightning

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

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.

3. Set Up Your Service Region

   Establish service territories and locations to track the places where your team performs field service work. Service territories represent regions in which field service work can be performed, such as cities or counties. You can model your work region in more detail by creating locations, which are warehouses, vans, or work sites where inventory is stored.

4. Set Up Your Workforce

   Create service resources and crews to represent your workforce. Service resources are Salesforce users who can perform field service work, while service crews are groups of users—often with complementary skills or levels of experience—who can be assigned to service appointments as a unit.

5. Set Up Time Tracking

   Establish operating hours for service territories and service resources to indicate when field service work can take place. Use time sheets to track how much time your field service employees spend on tasks.

6. 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.

7. Set Up and Manage Your Inventory

   Track and manage the storage, request, transfer, and consumption of every item in your inventory, and ensure that your mobile workforce has the right parts in stock to do their job. Whether parts are transferred from the warehouse to the customer or between technicians, your field service center has it covered.

8. Set Up Field 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.

9. Get Field Service Lightning Data

   Create report types to track field service activity in your org. To take your reporting a step further, use the Field Service Analytics App.

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. Click **Save**.

4. If you want, select the option to turn on in-app notifications for the Salesforce app 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

   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.

5. 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. Configure the Due Date on auto-created service appointments by indicating how many days past the Created Date it should fall.

6. If you want to use your knowledge base in field service, select the fields that the search engine should scan to suggest articles on work orders or work order line items. Press the Shift key and click the fields you want to select.

7. Click **Save**.

> 📝 Note: Enabling Field Service Lightning turns on geocoding (location data) for supported features. To learn more, see Calculating Address Geolocation in Field Service Lightning.

Give Users Access to Field Service Lightning

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 related to the managed package and mobile app:

- 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 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 Your Service Region

Establish service territories and locations to track the places where your team performs field service work. Service territories represent regions in which field service work can be performed, such as cities or counties. You can model your work region in more detail by creating locations, which are warehouses, vans, or work sites where inventory is stored.

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.

3. Configure Field Service Location Settings

   Control how your users work with Field Service locations, which are customer sites or places where inventory is stored.

4. Create Field Service Locations

   Locations are places, like warehouses, customer sites, or work vehicles, where inventory is stored. Create locations so you can track the items stored there and restock when necessary.

Configure Service Territory Settings

Control how your users work with service territories.

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

1. Assign user permissions.

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

2. Customize service territory page layouts.

   Control which fields appear on your service territory page layouts, and confirm that your layouts contain the following related lists:

- Child Service Territories: Service territories that represent a component of the current territory
- Service Territory Locations: Warehouses, work sites, or vehicles that are located or operate in the service territory
- Service Territory Members: Service resources that work in the service territory

3. 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 regions where your field service team works. Service territories typically represent geographical areas since service resources are based near the locations they service. However, you may decide to create territories based on other factors, like field sales versus field service. You can also organize service territories into hierarchies to reflect parent and child relationships.

> 💡 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** 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.

   For example, enter the name of a 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.

   For help, see Create Operating Hours.

7. Click **Save**.

8. Assign service resources to your territory from the Service Territory Members related list.

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

   Service resources use 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.

9. Optionally, assign locations to the territory from the Service Territory Locations related list. For example, if a warehouse is located within the service territory and has a corresponding location record, you can add it.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create service territories:
- Create on service territories

👁 **Example:** 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.

Configure Field Service Location Settings

Control how your users work with Field Service locations, which are customer sites or places where inventory is stored.

📝 **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.

1. Assign user permissions.

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

2. Customize the fields and related lists on the following objects' page layouts.

📝 **Note:** If you have your own field service terminology, remember that you can rename an object's tab and labels. In Setup, select **Rename Tabs and Labels**, and enter your own term for the object you'd like to rename.

Page Layout	Recommended Customizations for Inventory Management

Location	• Arrange the fields. The default layout includes only some of the available fields.
	
	⊘ **Important:**
	  – Add the Inventory Location field so you can track where inventory is stored.
	  – Add the Mobile Location field so you can flag mobile locations such as service vehicles.
	  – If you plan to create location hierarchies, add the Parent Location field, and optionally the read-only Root Location and Hierarchy Level fields.
	  – Optionally, customize the values in the Location Type field. Its out-of-the-box values are Warehouse, Van, Site, and Plant.
	
	• Add the Product Items related list, which shows the products stored at a location.
	• Confirm that your layout includes the desired related lists:

Page Layout	Recommended Customizations for Inventory Management
	– The Addresses related list shows addresses related to the location, such as billing and shipping addresses. – The Assets related list shows assets at the location. – The Associated Locations related list shows related accounts. – The Child Locations related list shows locations within the location, such as vehicles which are parked at a warehouse when not in use. – The Product Items related list shows product items (inventory) stored at the location. – The Service Territory Locations related list shows related service territories, which usually indicates that the location is within the territory.
Address	• Arrange the fields, which appear in the Addresses related list on locations. • Optionally, customize the values in the Address Type field. Its out-of-the-box values are Mailing, Shipping, Billing, and Home.
Associated location	Associated locations let you associate multiple accounts with one location. For example, a shopping center location may have multiple customer accounts. • Arrange the fields, which appear in the Associated Locations related list on locations and accounts.

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

Create Field Service Locations

Locations are places, like warehouses, customer sites, or work vehicles, where inventory is stored. Create locations so you can track the items stored there and restock when necessary.

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

1. From the Locations tab, click **New**.

2. Enter a location name.

3. Select a location type:
   • Warehouse (default)
   • Site
   • Van
   • Plant

4. If inventory is stored at the location, select **Inventory Location**. This allows you to you associate the location with items in your inventory, known as product items.

5. If the location can be moved, like a van or tool box, select **Mobile Location**.

6. Complete the other fields as appropriate.

7. Click **Save**.

8. In the Addresses related list, create addresses for the location. The available types of addresses are Mailing, Shipping, Billing, and Home.

9. In the Files related list, attach files like blueprints, photographs, or registration information.

Set Up Your Workforce

Create service resources and crews to represent your workforce. Service resources are Salesforce users who can perform field service work, while service crews are groups of users—often with complementary skills or levels of experience—who can be assigned to service appointments as a unit.

1. Configure Service Resource Settings

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

2. Create Service Resources

   Service resources are individual users or groups of users—known as service crews—who can perform field service work. Create service resources so you can assign service appointments to them.

3. Create Service Crews

   Set up teams who can be assigned to field service appointments as a unit. A service crew is a group of service resources whose combined skills and experience make them a good fit to work together on appointments. For example, a wellhead repair crew might include a hydrologist, a mechanical engineer, and an electrician.

4. 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
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Configure Service Resource Settings

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

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

1. Customize page layouts.

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

- Absences: View and manage the service resource's absences.

- Capacities: View and manage the service resource's capacity, or how much they can work in a specified time period.

- Service Appointments: View and manage the service appointments assigned to the service resource.

- Service Crews: View and manage the service crews that the service resource belongs to.

- Service Territories: View and manage the service territories where the service resource is available to work.

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

- Skills: View and manage the service resource's skills, which represent certifications and areas of expertise.

- Time Sheets: View and manage time sheets, which are used to track the service resource's time at work.

   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.

   If you intend to create service crews, update the field-level security settings of the Service Crew field so it's not hidden. Then, add the field to service resource page layouts and make sure that the User field is not marked required.

2. Assign user permissions.

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

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

Create Service Resources

Service resources are individual users or groups of users—known as service crews—who can perform field service work. Create service resources so you can assign service appointments to them.

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 or crew.

3. If the resource represents an individual user, select the user in the User field. If the resource represents a service crew, leave the User field blank and select the crew in the Service Crew field. Service resources must list a user or a service crew.

4. If you want to assign the resource to service appointments, select **Active**.

5. Indicate whether the resource is a technician, dispatcher, or crew.
   Resources who are dispatchers can't be capacity-based, included in scheduling optimization, or added to service crews. Only users with the Field Service Dispatcher permission set license can be dispatchers.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create service resources:
- Create on service resources

6. Enter a location if applicable. Service resources might be linked to a location if they manage or operate the location (such as a warehouse or van).

7. Select **Capacity-Based** if the resource is limited to working a certain number of hours or appointments in a specified time period. You can define the resource's capacity in the Capacities related list.

   Contractors are likely capacity-based.

8. If you're using the Field Service Lightning managed package with scheduling optimization, select **Include in Scheduling Optimization** to let the scheduling optimizer assign the resource to service appointments.

   Only users with the Field Service Scheduling permission set license can be included in scheduling optimization.

9. 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 in the Capacity related list.

   a. 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`.

   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.

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

Create Service Crews

Set up teams who can be assigned to field service appointments as a unit. A service crew is a group of service resources whose combined skills and experience make them a good fit to work together on appointments. For example, a wellhead repair crew might include a hydrologist, a mechanical engineer, and an electrician.

1. From the Service Crews tab, click **New**.

2. Enter a crew name and size.

3. Save your changes.

4. From the Service Crew Members related list, add service resources to the crew. You can specify start and end dates for crew members and flag the crew leader. Only service resources of the Technician resource type can be added to crews.

5. Create a service resource record to represent the crew, which is used to assign the crew to service appointments. Changing a crew's members doesn't affect its service appointment assignments.

   > **Note:** You can't activate a crew service resource unless the related service crew contains at least one active member.

   a. From the Service Resources tab, click **New**.

   b. Enter a name for the crew.

   c. Leaving the User field blank, select the crew in the Service Crew lookup field.

   d. Select a Resource Type of Crew.

   e. Select **Active** to be able to assign the crew to service appointments.

      Service resources that are crews can't be activated unless the crew has at least one active member.

   f. Skip the scheduling optimization option, which doesn't apply to service crews.

   g. Save your changes.

6. Assign the crew to service appointments.

   a. In the Assigned Resources related list on an appointment, click **New**.

   b. Select the service resource that represents the crew, and fill out the other fields as needed.

   c. Save your changes.

The crews that a service resource belongs to appear in the Service Crews related list on the resource's detail page. You can also see all service crew memberships in the Service Crew Members tab in Salesforce. A service resource can be a member of multiple crews as long as the membership dates don't overlap.

> **Tip:** To change the fields that appear in the Service Crew Members related list, update the Service Crew page layout.

Service crews aren't available in Salesforce mobile web, Salesforce for Android, Salesforece for iOS, scheduling optimization, or the Gantt display.

EDITIONS

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

USER PERMISSIONS

To create service crews:
- Create on service crews

To create service resources representing crews:
- Create on service resources

To assign service crews to service appointments:
- Edit on service appointments

Set Up Skills for Field Service

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

1. Configure Skill Settings

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

2. Create Skills

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

3. Assign Skills to Service Resources

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

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.

Create Skills

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

1. From Setup, enter `Skills` in the Quick Find box, then select **Skills** under Field Service.

2. Enter a name. For example, `Electrician Certification`.

3. Enter a description.

4. Skip the Assign Users and Assign Profiles sections, which are specific to Live Agent.

5. Click **Save**.
You can now assign the skill to service resources or list it as required on work types, work orders, and work order line items.

Assign Skills to Service Resources

Assign skills to service resources to track 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.

Set Up Time Tracking

Establish operating hours for service territories and service resources to indicate when field service work can take place. Use time sheets to track how much time your field service employees spend on tasks.

1. Create Operating Hours

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

2. Set Up Time Sheets

   Control what you track on service resource time sheets.

3. Create Time Sheets

   Time sheets let service resources track their time and attendance.

Create Operating Hours

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

By default, only System Administrators can view, create, and assign operating hours.

🛑 **Important:** Before you get started, read Operating Hours Considerations.

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 begins and ends at 12:00 AM.

5. Assign the operating hours to one or more service territories.

   a. Navigate to the service territory detail page.

   b. Select the desired hours in the Operating Hours lookup field on the territory detail page.

   c. Save your changes.

6. Service resources automatically use their service territory's operating hours. If a resource needs different operating hours than their territory, update their service territory member record to reflect this.

   a. From the Operating Hours tab, create separate operating hours to assign to the service territory member.

   b. From the Service Territory Members related list on the service territory, click the Member Number for the territory member whose hours you want to modify.

   c. Select the desired hours in the Operating Hours field.

    d. Save your changes.

7. If needed, assign operating hours to accounts. From the account detail page, select the desired hours in the Operating Hours field.

> 📝 **Note:** If the Field Service Lightning managed package is installed in your org, the default operating hours used when booking an appointment for an account are set elsewhere. From the Field Service Settings tab, click **Global Actions**, then select **Appointment Booking** and update the operating hours listed there.

Set Up Time Sheets

Control what you track on service resource time sheets.

Time sheets make it possible to track service resources' time and attendance. A time sheet covers a defined period of time, such as a week or a month. Each time sheet is made up of time sheet entries, which track specific tasks, travel time, and break time.

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

1. Customize the Time Sheet Entry page layout.

    a. From Setup, enter `Time Sheet Entries` in the Quick Find box, then select **Page Layouts** under Time Sheet Entries.

    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 Sheets page layout.

    a. From Setup, enter `Time Sheets` in the Quick Find box, then select **Page Layouts** under Time Sheets.

    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 the Time Sheet Entries related list to the Time Sheet page layout.

    e. Click **Save**.

3. Add the Time Sheets related list to the service resource page layout. This lets service resources manage their time sheets.

    a. From Setup, enter `Service Resources` in the Quick Find box, then select **Page Layouts** under Service Resources.

    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 page layout.

    e. Click **Save**.

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

Create Time Sheets

Time sheets let service resources track 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.

   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**.

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 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. Add Required Skills to Work Orders or Work Types

   Define skill requirements on work types, work orders, and work order line items to ensure that the work is assigned to a service resource with the right skills.

6. Create Service Appointments

   Service appointments help you track field service work to be performed for customers. While work orders describe the work to be performed, service appointments are where you add the scheduling and assignment details. You can associate service appointments with several types of records.

7. Create Maintenance Plans

   An ounce of prevention is worth a pound of cure. Create preventive maintenance plans for specific assets so your customers never miss a beat.

Configure Work Order Settings

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

1. Customize page layouts.

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

   - Account
   - Asset
   - Case
   - Contact
   - Entitlement
   - Maintenance Plan

     > Note: To add the Work Orders related list to maintenance plan page layouts, change the field-level security for the Maintenance Plan and Suggested Maintenance Date fields on work orders to make them available to users.

   - Service Contract

   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, 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, add the read-only Root Work Order Line Item field.

   e. Control which related lists appear on work order page layouts. You may want to include the following.

   - Products Consumed: Products used during the completion of the work order
   - Product Requests: Products requested for the work order
   - Product Request Line Items: Line items on product requests
   - Products Required: Products needed to complete the work order
   - Resource Preferences: Preferred, required, or excluded service resources on the work order
   - Service Appointments: Appointments indicating when the work is scheduled
   - Service Reports: Reports summarizing the work for customers
   - Skill Requirements: Skills that technicians need to complete the work order
   - Time Sheet Entries: Schedule of technicians' time spent on the work order
   - Work Order Line Items: Subtasks or steps on the work order

2. Assign user permissions.

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

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

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

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

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

5. Control which fields appear on work order page layouts. Depending on when your org was created, the field-level security settings on some fields must be updated so the fields can be added to the page layouts.

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 Knowledge components to work order page 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 templates that save you time and make it easier to standardize your field service work.

1. From the Work Types tab, click **New**.

2. Enter a name and description. Try to use a name that helps users quickly understand the nature of the records that can be created from the work type. For example, `Annual Refrigerator Maintenance` or `Valve Replacement`.

3. Enter an Estimated Duration, which is how long the work is estimated to take, and a Duration Type of Minutes or Hours.

4. Select a service report template to be applied to service reports for records that use the work type. If a different service report template is specified on the record, that overrides the work type template.

5. Add a Minimum Crew Size and Recommended Crew Size to indicate the desired size of a service crew assigned to the work. For example, specify that the work is best handled by a crew of 3 (recommended crew size), but can be done with just 2 technicians (minimum crew size).

> 💡 Tip: The crew size fields are hidden for all users by default. If you don't see them, you may need to update their field-level security settings in Setup.

6. 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.

7. Click **Save**.

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

To apply work types to service appointments:
• Edit on service appointments

8. If the task represented by the work type requires certain skills or certifications, add them in the Skill Requirements related list. Skills must be created before they can be added as a required skill; to learn how, see Create Skills.

9. If certain products are needed to complete the type of work, add them in the Products Required related list.

10. To apply a work type to a work order, work order line item, or service appointment, select the work type in the Work Type lookup field on the record when creating it. When you add a work type, the work order or work order line item inherits the work type's settings.

> **Note:**
> - You can update a record's settings after they're inherited from the work type.
> - If a work order or work order line item already has required skills or products, associating it with a work type doesn't cause it to inherit the work type's required skills or products.
> - Customizations to required skills or products, 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`
> - Products Required: 1 Hammer
> - 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, required skills, and required products and automatically creates a service appointment on the work order.

Create Work Orders

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

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 following settings on work orders:

   - Duration
   - Duration Type
   - Minimum Crew Size
   - Recommended Crew Size
   - Service Report Template
   - Skill Requirements
   - Products Required
   - Auto-creation of a service appointment

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. Optionally, select a price book. This lets you select a corresponding price book entry (product) for each work order line item, and is used on Product Consumed records that are associated with price book entries.

5. 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.

6. Fill out the remaining fields as needed.

7. Click **Save**.

8. 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 from the Skill Requirements related list. For details, see Add Required Skills to Work Orders or Work Types.

   c. Specify which products are required to complete the work order from the Products Required related list.

   d. Create a service appointment from 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

Add Required Skills to Work Orders or Work Types

Define skill requirements on work types, work orders, and work order line items to ensure that the work is assigned to a service resource with the right skills.

Adding required skills to work types saves you time and keeps your business processes consistent. Work orders and work order line items inherit their work type's required skills. For example, if all annual maintenance visits for your Classic Refrigerator product require a Refrigerator Maintenance skill level of at least 50, 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, applying that work type to the work order adds the required skill.

📝 **Note:**

- After a work order inherits its work type's skill requirements, you can modify them on the work order if needed.

- Changing a work type's skill requirements doesn't affect the requirements on work orders that were created using that work type.

- If you add a work type to an existing work order, the work order only inherits the skill requirements if the work order didn't yet have any.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add skill requirements to work orders, work order line items, or work types:
- Edit on work orders, work order line items, or work types

The previous rules are also true for work order line items. Work order line items don't inherit their parent work order's skill requirements.

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**.

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.

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.

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.

Create Service Appointments

Service appointments help you track field service work to be performed for customers. While work orders describe the work to be performed, service appointments are where you add the scheduling and assignment details. You can associate service appointments 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.

    d. In the Service Note field, add notes such as an appointment summary or recommendations. Depending on your settings, these notes might appear on a customer-facing service report.

4. Fill out the Scheduled Times section:

    a. Add scheduled start and end times. If you're using the Field Service Lightning managed package with the scheduling optimizer, these fields are populated when the appointment is scheduled.

    b. Define an arrival window, which is the window of time when the technician is expected to arrive at the site. This window is typically larger than the scheduled start and end window to allow time for delays and scheduling changes. You may choose to share the arrival window start and end with the customer, but keep the scheduled start and end internal-only.

5. Assign service resources to the appointment in the Assigned Resources related list. If the parent record is a work order, work order line item, or account, check the parent for any resource preferences.

    Note: Service resource who are dispatchers can't be assigned to service appointments.

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

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.

You can also create service appointments from the Service Appointments tab. Even better, work types have an **Auto-Create Service Appointment** option which, if selected, auto-creates a service appointment on work orders or work order line items that use the work type. For details, see Create Work Types.

Create Maintenance Plans

An ounce of prevention is worth a pound of cure. Create preventive maintenance plans for specific assets so your customers never miss a beat.

Maintenance plans let you define how often maintenance occurs and save time by automatically generating work orders for all future maintenance visits. Plans can be associated with clients (accounts), work types, service contracts, and assets.

> 📝 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**.

7. Fill in the rest of the fields according to your needs.

8. Click **Save**.

9. Add assets covered by the plan in the Maintenance Assets related list.

   > 💡 Tip: To control which fields appear in the related list, edit the Maintenance Assets page layout in Setup.

> 👁 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.

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 value
- Decreasing the Generation Timeframe value
- Removing assets from the maintenance plan

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

To generate work orders:
- Read on assets and work types

  AND

  Create on work orders and service appointments

To edit page layouts:
- Customize Application

Set Up and Manage Your Inventory

Track and manage the storage, request, transfer, and consumption of every item in your inventory, and ensure that your mobile workforce has the right parts in stock to do their job. Whether parts are transferred from the warehouse to the customer or between technicians, your field service center has it covered.

First, a little vocabulary review! Field service inventory management comes with a full toolbox of features. You can find these features in Salesforce as tabs or related lists:

- **Locations** are places, like warehouses, sites, or work vehicles, where inventory is stored.
- **Product items** represent products in your inventory stored at a particular location, such as bolts stored in a warehouse. Each product item is associated with a product and a location in Salesforce. If a product is stored at multiple locations, the product will be tracked in a different product item for each location.
- **Products required** are products that are needed to complete a work order or work order line item.
- **Products consumed** are product items that were used to complete a work order, and are no longer in your inventory.
- **Product item transactions** describe actions performed on a product item. They're auto-generated records that help you track when a product item is replenished, consumed, or adjusted.
- **Product requests** are orders for products, which you might create when stock is running low.
- **Product request line items** are subdivisions of a product request.
- **Product transfers** track the transfer of product items between inventory locations.
- **Shipments** represent the shipment of product items between locations.

Now that you've got the important terms under your belt, it's time to configure your org for inventory management.

1. Configure Parts and Inventory Settings

   Make sure the right information is at your team's fingertips. To get started with field service inventory management, customize inventory page layouts and check user permissions.

2. Create Parts

   After you customize your field service inventory settings, track where your inventory is stored by creating product items.

3. Track Required Parts

   If a work order needs to be completed by a carpenter with a hand saw, don't assign it to an electrician with a voltmeter! Add required products to work types, work orders, and work order line items to ensure that the assigned service resource arrives with the right equipment.

4. Track Consumed Parts

   Create products consumed to track the use or consumption of items from your inventory.

5. Configure Part Request and Transfer Settings

   Control how your users request and transfer parts for field service inventory management.

6. Request Parts

   When your stock gets low or you need a part for a particular work order, create a product request. Product requests can be associated with work orders, work order line items, cases, and accounts. You can specify when and where the parts are needed, and divide the request into line items that each represent a needed part.

7. Transfer Parts

   To fulfill a product request, create a product transfer. Product transfers track the movement of parts from one field service location to another. When you track product transfers in Salesforce, the inventory numbers at your various storage locations update automatically to reflect the transfers.

8. Create Shipments

   To track product items while they're in transit between locations, create shipments. Shipments contain information about the products on board, the shipping carrier, and the expected delivery date.

Configure Parts and Inventory Settings

Make sure the right information is at your team's fingertips. To get started with field service inventory management, customize inventory page layouts and check user permissions.

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

1. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	Customize Application
View the Products tab and records	Read on products
View the Product Items tab and records	Read on product items
Create, edit, or delete product items	Create, Edit, or Delete on product items
Add products required to work orders, work order line items, or work types	Edit on work orders, work order line items, or work types
Create, edit, or delete products consumed on work orders or work order line items	Create on work orders AND Read on product items
View product item transactions	Read on product items
Edit product item transactions	Edit on product items

2. Customize the fields and related lists on the following objects' page layouts.

   💡 **Tip:** If you have your own field service terminology, remember that you can rename an object's tab and labels. In Setup, select **Rename Tabs and Labels**, and enter your own term for the object you'd like to rename.

Page Layout	Recommended Customizations for Inventory Management
Product	• Confirm that your layout includes the Product Items related list, which shows the location and quantity of related product items.
	• Define values for the Quantity Unit of Measure picklist field, which comes with one value (Each). These values are reflected in the Quantity Unit of Measure field on product items, product request line items, product transfers, products consumed, and products required.
	a. From Setup, enter `Products` in the Quick Find box, then select **Fields** under Products.
	b. Click **Quantity Unit of Measure**.

Page Layout	Recommended Customizations for Inventory Management
	c. In the Quantity Unit of Measure Picklist Values related list, click **Edit** to change the default or **New** to add values. For example, you may need values like Kilograms or Liters. **d.** Save your changes.
Product item	• Arrange the fields. The default layout includes only some of the available fields. • Confirm that your layout includes the Product Item Transactions related list, which automatically tracks the replenishment, consumption, and adjustment of product items.
Product consumed	Arrange the fields that appear in the Products Consumed related list.
Product required	Arrange the fields that appear in the Products Required related list.
Product item transaction	Arrange the fields that appear in the Product Item Transactions related list.
Work order Work order line item	Confirm that your layouts include the following related lists. • The Products Required related list shows products needed to complete the work. • The Products Consumed related list shows product items used to complete the work.

3. Make the Products and Product Items tabs visible to your users. You can add the tabs to a custom app or instruct users to add them in Salesforce.

4. Configure the Field Service Lightning mobile app for inventory management. For instructions, see Inventory Management with the Field Service Lightning Mobile App.

Create Parts

After you customize your field service inventory settings, track where your inventory is stored by creating product items.

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

Product items represent your inventory. Each product item is linked to a storage location, such as a van or warehouse, and to a specific product, indicating the item being stored. Create product items so you can track inventory usage and restock when necessary.

Before you get started, choose whether to assign serial numbers to product items for identification purposes.

• If you assign a serial number, each product item represents a single item in your inventory: for example, create one product item representing a motor with serial number 012345 stored at Warehouse A.

• If you choose not to assign serial numbers, you can specify a quantity on each product item. Create one product item for every location that has the product in stock. For example, create:

  – One product item representing 100 batteries stored at Warehouse A
  – One product item representing 15 batteries stored in Service Van 1

Product item quantities auto-update to reflect transfers between locations.

> ⚠️ **Warning:** If you plan to specify serial numbers on product items, consider these limitations:
>
> - The location on serialized product items can't be updated after creation, either through a product transfer or a manual update of the product item record.
> - Technicians using the Field Service Lightning mobile app can consume—via the Products Consumed related list—only one serialized product item looking up to the same product per work order. This limitation is on mobile only.

1. From the Product Items tab, click **New**.

2. Use the lookup field to select a product.

   > 💡 **Tip:** To add products to your org, see Guidelines for Creating Products.

3. Use the lookup field to select the location where the product item is stored. Only locations that have the **Inventory Location** option selected can be associated with product items.

4. Enter the Quantity on Hand, which is the amount at this location. If you intend to add a serial number, this value must be 1.

5. If needed, add a unit of measure; for example, grams, packs, or units. These values are inherited from the Quantity Unit of Measure field on products.

6. If the Quantity on Hand is 1, enter a serial number.

7. Click **Save**.

The product item now appears in the Product Items related list on the associated location and product records. In addition, the Product Item Transactions related list on the product item now contains a "Replenished" transaction that tells you when the product item was created.

If you update a product item, a new product item transaction is created with a type of "Adjusted" and a quantity that is the difference between the old and new Quantity On Hand. Deleting a product item deletes all related product item transactions.

Track Required Parts

If a work order needs to be completed by a carpenter with a hand saw, don't assign it to an electrician with a voltmeter! Add required products to work types, work orders, and work order line items to ensure that the assigned service resource arrives with the right equipment.

Adding required products to work types saves you time and keeps your business processes consistent. Work orders and work order line items inherit their work type's required products. For example, if all light bulb replacement jobs require a ladder and a light bulb, add the ladder and light bulb as required products to your Light Bulb Replacement work type. When it's time to create a work order for a customer's light bulb replacement, applying that work type to the work order adds the required products.

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

1. Navigate to the record that needs required products.

2. In the Products Required related list, click **New**.

3. Use the lookup field to select a product.

4. Enter the quantity required.

5. Select a quantity unit of measure.

6. Click **Save**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add products required to work orders, work order line items, or work types:
- Edit on work orders, work order line items, or work types

📝 **Note:**

- After a work order inherits its work type's required products, you can modify them on the work order if needed.
- Changing a work type's required products doesn't affect the required products on work orders that were created using that work type.
- If you add a work type to an existing work order, the work order only inherits the required products if the work order didn't yet have required products.

The previous rules are also true for work order line items. Work order line items don't inherit their parent work order's required products.

Track Consumed Parts

Create products consumed to track the use or consumption of items from your inventory.

When a part leaves your inventory—whether it's installed or used as part the work, or it's broken and needs to be returned—create *products consumed* so your inventory numbers are adjusted accordingly. You can add products consumed to work orders or work order line items. Track product consumption at the line item level if you want to know which products were used for each line item's tasks.

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

1. In the Products Consumed related list on a work order or work order line item, click **New**.

2. If applicable, enter a work order line item. The work order is auto-populated.

3. In the Product Item field, select the product item where the part originated. For example, if 10 bolts that were stored in Warehouse B were used to complete the work order, select the product item that represents all bolts stored in Warehouse B.

4. Enter the quantity consumed.

5. To link the consumed product to a price book entry, select a price book entry and enter the unit price.

6. Add context in the Description field.

7. Save your changes.

💡 **Tip:** After a product item is consumed, track it as an asset (an installed or purchased product) and add product details like a serial number.

Configure Part Request and Transfer Settings

Control how your users request and transfer parts for field service inventory management.

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

1. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	Customize Application
View the Products, Product Items, Product Requests, Product Transfers, or Shipments tab and records	Read on each object
Create, edit, or delete products, product items, product requests, product transfers, or shipments	Create, Edit, or Delete on each object

2. Customize the fields and related lists on the following objects' page layouts.

💡 **Tip:** If you have your own field service terminology, remember that you can rename an object's tab and labels. In Setup, select **Rename Tabs and Labels**, and enter your own term for the object you'd like to rename.

Page Layout	Recommended Customizations for Inventory Management

Product request	• Arrange the fields. The default layout includes only some of the available fields.
	• Optionally, customize the Status field values. The default values are Draft, Submitted, and Received.
	• Confirm that your layout includes the following related lists.
	  – The Product Transfers related list shows transfers that are created to fulfill the request.
	  – The Product Request Line Items related list shows the request's line items (each associated with a product).

Product request line item	• Arrange the fields. The default layout includes only some of the available fields. • Optionally, customize the Status field values. The default values are Draft, Submitted, and Received. • Confirm that your layout includes the Product Transfers related list, which shows transfers created to fulfill the request.
Product transfer	• Arrange the fields. The default layout includes only some of the available fields. • Optionally, customize the Status field values. The default values are Ready for Pickup and Completed. • Confirm that your layout includes the Product Item Transactions related list, which automatically tracks the replenishment, consumption, and adjustment of the product items being transferred.
Shipment	• Arrange the fields. The default layout includes only some of the available fields. • Optionally, customize the Status field values. The default values are Shipped and Delivered.

Page Layout	Recommended Customizations for Inventory Management
	• Confirm that your layout includes the Product Transfers related list, which shows transfers that the shipment fulfills.
Work order Work order line item	Confirm that your layouts include the following related lists. • The Product Requests related list shows product requests created to ensure that the assigned service resources have the parts they need to complete the work. • The Product Request Line Items related list shows product request line items associated with the work.

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.

Request Parts

When your stock gets low or you need a part for a particular work order, create a product request. Product requests can be associated with work orders, work order line items, cases, and accounts. You can specify when and where the parts are needed, and divide the request into line items that each represent a needed part.

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

Technicians or mobile workers can make requests when they find defective parts in their vehicles or their stock has run out. Dispatchers or service managers can create product requests on behalf of their technicians if they see their stock getting low. And schedulers can create product requests when they schedule work orders that require parts which aren't normally found in a technician's vehicle stock.

1. From the Product Requests tab or the Product Requests related list on a work order or work order line item, click **New**.

2. If the request is being made for a particular job, select the related work order or work order line item.

3. Optionally, select the related account or case.

4. Enter the destination location, which is where the parts are needed.

   💡 **Tip:** Service vehicles can also be locations. Mobile locations like vehicles have **Mobile Location** selected on their detail page.

5. Enter the address where the parts should be shipped; for example, the mailing address of the warehouse that is requesting them.

6. Select a shipment speed, and enter the Need By Date.

7. If the parts are being transferred from another location such as a warehouse, enter the source location.

8. Add a description.

9. Assign the product request a status:

   • Draft: Finalizing the product request details.
   • Submitted: The product request is ready for processing.

- Received: The department in charge of fulfilling the request is working on it.

10. Save your changes.

11. Create one product request line item for each product needed.

    a. From the Product Request Line Items related list, click **New**.

    b. Select the product that is needed, and enter a quantity and unit of measure. These values are inherited from the Quantity Unit of Measure field on products.

    c. Fill in the rest of the fields as needed. The parent product request's shipping and related record information is auto-populated on its line items.

    d. Save your changes.

The product request now appears in the Product Requests related list on the related work order or work order line item. You can also view and sort line items from all product requests from the Product Request Line Items tab in Salesforce.

Transfer Parts

To fulfill a product request, create a product transfer. Product transfers track the movement of parts from one field service location to another. When you track product transfers in Salesforce, the inventory numbers at your various storage locations update automatically to reflect the transfers.

> 📝 **Note:**
> - You can't create product transfers for product items with serial numbers.
> - Field Service Lightning must be enabled in your org.

Create one product transfer for each product request line item. This way, you can track the status of each part being requested. The Product Transfers related list on a product request shows all product transfers associated with the request's line items. In addition, product request line items have their own Product Transfers related list that shows related transfers.

While product transfers are typically created in response to a product request, they don't have to be. For example, when a new technician joins your team, you might create a series of product transfers to track the initial stocking of their service vehicle.

> 💡 **Tip:** When creating a transfer, set the status of the related product request line item to Received to indicate that the request is being processed.

1. From the Product Transfers tab or the Product Transfers related list on a product request, product request line item, or shipment, click **New**.

2. Enter a source product item or product.

- If the parts are being transferred from a location within your inventory, such as a warehouse, enter a source product item. This shows where the parts are being transferred from, and updates the quantity at the source location. For example, if you need 5 hammers to be transferred from Warehouse A to Warehouse B, select the product item record that tracks the hammers stored at Warehouse A.

- If the products are being transferred from outside your inventory—for example, if they're being ordered from a manufacturer—enter a product name.

3. Enter the quantity being transferred and the Quantity Unit of Measure. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.

4. If it's not already populated, enter the related product request line item.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create product transfers for field service:
- Create on product transfers

To mark product transfers received:
- Edit on product items

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5. Use the lookup field to select the shipment on which the product items are being transferred.

6. Enter the destination location, and if applicable, the source location.

7. Enter the expected pickup date.

8. Add a description.

9. After the transferred parts are received, select Received and update the following fields:

   • Received By

   • Quantity Received

   • Status

   Once you mark a product transfer received, you can't undo it.

10. Save your changes.

When a product transfer is marked received, Salesforce creates or updates several related records to ensure that your inventory numbers stay accurate. To learn more, see How Product Transfers Work.

Create Shipments

To track product items while they're in transit between locations, create shipments. Shipments contain information about the products on board, the shipping carrier, and the expected delivery date.

You can link shipments to product transfers so your team always knows the status of part transfers. While shipments are an optional part of inventory management, they make it easier to stay informed about the coming and going of parts in your inventory.

1. From the Shipments tab, click **New**.

2. In the General Information section, add details about the shipment's origin and destination. If applicable, select the field service locations where the shipment departs or arrives.

3. In the Tracking Information section, add details about the shipping provider and delivery date.

4. Add a description explaining what is being shipped.

5. Save your changes.

6. From the Product Transfers related list, create product transfers to track the movement of product items that were included in the shipment.

EDITIONS
Available in: Salesforce Classic and Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS
To create shipments:
• Create on shipments

Set Up Field 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.

1. Create Service Report Templates
   Control what information your service reports contain.

EDITIONS
Available in: Salesforce Classic and Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

2. Create Service Reports

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

Create Service Report Templates

Control what information your service reports contain.

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

1. If you want people to sign service reports using the Field Service Lightning mobile app, create picklist values for the Signature Type field on digital signatures. Signature types represent the role of the person signing a report.

   a. Navigate to the Setup page.

      • In Salesforce Classic, from Setup, enter `Digital Signatures` in the Quick Find box, then select **Fields** under Digital Signatures.

      • In Lightning Experience, go to Digital Signature in the Object Manager, then click **Fields and Relationships**.

   b. Click **Signature Type**.

   c. From the Signature Type Picklist Values related list, add up to 1,000 values to the picklist. For tips on creating signature types, see Guidelines for Using Signatures on Service Reports.

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 Read permission on certain objects or fields in the service report template, those fields don't appear on the report they create.

3. Create a service report template.

   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.

      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.

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
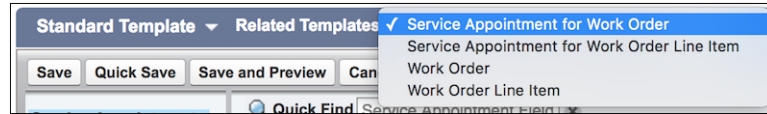
> **Tip:**
> - You can add up to 20 signature blocks to the Signatures section. Every signature block must use a different signature type.
> - Use the Blank Space field to add vertical space anywhere on the template. Each Blank Space field adds five pixels of vertical space to the report PDF.

e. Click **Save**.

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.

Create Service Reports

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. Service reports can't be created for service appointments whose parent record is an account, asset, or opportunity.

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.

> **Note:**
> - The fields that appear on a service report are determined by the service report template being used.
> - Service reports can't be deleted in Lightning Experience. To delete a service report, switch to Salesforce Classic.
> - To view a service report in Lightning Experience, you must download it.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create service reports:
- Edit on the parent object (work orders, work order line items, or service appointments)

Get Field Service Lightning Data

Create report types to track field service activity in your org. To take your reporting a step further, use the Field Service Analytics App.

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:

   ✎ **Note:** This table doesn't include feed objects that are available as secondary objects.

Primary Object	Description	Available Secondary Objects
Accounts	View accounts' maintenance plans, product requests, resource preferences, and work orders.	*Field service objects:* Maintenance Plans Product Requests Product Request Line Items Resource Preferences Work Orders
Assets	View assets' maintenance plans, replacements, and work orders.	*Field service objects:* Asset Relationships Maintenance Assets Work Orders
Cases	View cases' work orders and product requests.	*Field service objects:* Product Requests Product Request Line Items Work Orders
Contacts	View contacts' maintenance plans, service appointments, and work orders.	*Field service objects:* Maintenance Plans Service Appointments Work Orders
Locations	View locations' maintenance plans, parts, part transfers, and more.	Addresses Assets Maintenance Plans Product Items Product Requests Product Request Line Items

Primary Object	Description	Available Secondary Objects
		Product Transfers Service Resources Service Territory Locations Shipments Work Orders Work Order Line Items
Maintenance Plans	View maintenance plans' work orders and assets.	Maintenance Assets Work Orders
Operating Hours	View the operating hours of service territories and their members.	Service Territories Time Slots
Product Items	View the transfer, consumption, and replenishment of parts in your inventory.	Product Transfers Products Consumed Product Item Transactions
Product Request Line Items	View the transfers related to parts in your inventory.	Product Transfers
Product Requests	View the line items associated with product requests.	Product Request Line Items
Products	View product requirements, transfers, requests, and parts.	*Field service objects:* Assets Product Items Products Required Product Request Line Items Product Transfers
Product Transfers	View product quantity, origin and destination locations, and owner of product transfers.	None
Service Appointments	Compare the differences between scheduled and actual appointment times, and analyze trends in resource assignment on appointments.	Assigned Resources
Service Contracts	View service contracts' maintenance plans and work orders.	*Field service objects:* Maintenance plans Work Orders

Primary Object	Description	Available Secondary Objects
Service Crews	View appointments that crews are assigned to and information about crew members.	Assigned Resources Service Crew Members
Service Resources	Compare service resources' capacities, absences, and skills, and view the territories they belong to and service appointments and crews they are assigned to. And, see which accounts or work orders list resources as preferred.	Assigned Resources Resource Absences Resource Capacities Resource Preferences Service Crew Members Service Resource Skills Service Territory Members Time Sheets
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 that belong to each territory.	Service Appointments Service Territory Members Service Territory Locations Work Orders Work Order Line Items
Shipments	View shipment address and transfer information.	Product Transfers
Time Sheets	View time sheets' owners, entries, and duration.	Time Sheet Entries
Users	View field service records created by, modified by, or associated with users.	*Field service objects:* Assets (Asset Owner, Created By, Last Modified By) Locations (Created By, Last Modified By) Maintenance Plans (Created By, Last Modified By) Operating Hours (Created By, Last Modified By) Product Items (Created By, Last Modified By) Product Requests (Created By, Last Modified By) Product Request Line Items (Created By, Last Modified By) Product Transfers (Created By, Last Modified By)

Primary Object	Description	Available Secondary Objects
		Service Appointments (Created By, Last Modified By)
		Service Crews (Created By, Last Modified By)
		Service Resources (User, Created By, Last Modified By)
		Service Territories (Created By, Last Modified By)
		Shipments (Created By, Last Modified By)
		Time Sheets (Created By, Last Modified By)
		Work Orders (Owner, Created By, Last Modified By)
		Work Types (Created By, Last Modified By)
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.	Object Milestones Products Consumed Product Requests Products Required Product Request Line Items Resource Preferences Service Appointments Skill Requirements Time Sheet Entries Work Order Line Items Work Order Line Items
Work Types	Compare information such as work type duration and skill requirements.	Maintenance Plans Products Required Skill Requirements

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.

Salesforce also offers the Field Service Analytics App, which is bundled with the Service Analytics App. To learn more, see The Field Service Analytics App.

> 💡 **Tip:** To view work orders with milestones in your org, use the Object Milestones custom report type. The Milestone Status and Milestone Status Icon fields are not available in work order reports.

FIELD SERVICE LIGHTNING CONSIDERATIONS

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

Field Service Lightning Objects

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

Field Service Lightning Limits and Limitations

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

Calculating Address Geolocation in Field Service Lightning

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

How Pricing Works on Work Orders

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

Operating Hours Considerations

Learn how operating hours work and how to assign them to people and regions.

Field Service Lightning Objects

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.	
Assigned Resource	Service resource who is assigned to a service appointment.	
Associated Location	Location linked to a specific account.	
Digital Signature	Captured signature from a field service customer or technician.	
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, usually where inventory is stored 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 from your inventory that was used to complete a work order or work order line item.	
Product Item	A portion of your inventory stored at a particular location. Every product item is linked to a product and a location.	✔
Product Item Transaction	Represents the restocking, consumption, or stock adjustment of a product item.	
Product Request	A request for a part or parts.	✔
Product Request Line Item	A subdivision of a product request, associated with a particular product.	✔
Product Required	A product that is required for the completion of a work order or work order line item.	
Product Transfer	The transfer of inventory from one location 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 Appointment Status	Corresponds to the Status field on service appointments.	
Service Crew	A group of service resources that can be assigned to field service work as a unit.	✔
Service Crew Member	A service resource that belongs to a service crew.	✔
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 or crew who can perform field service work. You can assign service 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.	

Object Name	Definition	Tab in Salesforce?
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.	✔
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	A shipment of inventory 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 Order Status	Corresponds to the Status field on work orders.	
Work Order Line Item Status	Corresponds to the Status field on work order line items.	
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.	✔
Asset Relationship	A relationship between two assets that represents a replacement or upgrade.	
Contract Line Item	A subdivision of a service contract, typically representing a product covered by the service contract.	
Entitlement	Represents the level of support that a customer is entitled to.	✔
Product	A product or service that your business sells.	✔
Service Contract	Represents a service-level agreement such as a warranty or subscription.	✔
Skill	A capability needed to perform tasks.	✔

Object Name	Definition	Tab in Salesforce?
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.

Limits

Limit	Details
Maximum number of service resources per user	1
Maximum number of service territories in a service territory hierarchy	500
Maximum number of work orders in a work order hierarchy	10,000
Maximum number of work order line items in a work order line item hierarchy	10,000
Maximum number of work orders that can be generated simultaneously for a maintenance plan	2,500 💡 Tip: To decrease the number of work orders generated, increase the Frequency value, decrease the Generation Timeframe value, or decrease the number of assets related to the maintenance plan.
Maximum number of locations in a location hierarchy	10,000
Maximum number of signature blocks on a service report template	20
Maximum number of values in the Signature Type picklist on digital signatures	1,000
Maximum number of child assets per asset	2,000
Maximum number of levels in an asset hierarchy	50
Maximum number of assets in an asset hierarchy	10,000

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.

Limit	Details
Maximum size of asset hierarchies that can be viewed in the tree grid view	500

Limitations

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 the Salesforce app.
- Linked articles are view-only in Lightning Experience and the Salesforce app.
- In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic. In the Salesforce app, linked articles can't be accessed from feed items.

Operating Hours

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

Service Reports

- Service reports can't be deleted in Lightning Experience. To delete a service report, switch to Salesforce Classic.
- Service reports can't be viewed in Lightning Experience. To view a service report, download it or switch to Salesforce Classic.
- You can't write triggers for service reports.
- Service reports can't be created on service appointments whose parent records are assets, accounts, or opportunities.
- The **Create Service Report** action isn't available in the Salesforce app.

Service Resources and Crews

- Service crews aren't available in Salesforce mobile web, Salesforce for Android, or Salesforce for iOS. You can still view service resources of the Crew type, but clicking the value in the Service Crew field leads to an error.
- The User field on service resources isn't editable in Lightning Experience. To update the user on a service resource, switch to Salesforce Classic.

Inventory Management

- Technicians using the Field Service Lightning mobile app can consume—via the Products Consumed related list—only one serialized product item per work order. This limitation doesn't apply to non-mobile platforms.
- The location on serialized product items can't be updated after creation, either through a product transfer or manual update of the product item record.

The Salesforce App

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

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

Calculating Address Geolocation in Field Service Lightning

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

This geolocation 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 data integration rules. A record's geocoding fields are refreshed when:

- The record is created or updated

- The record type's data integration 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 data integration 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 Data Integration Rules 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 Statuses for Data Integration. The In Sync status means that your geocoding data is current.

  – An **Update** link which lets you manually run an instant refresh.

- *If you're using Lightning Experience*

  On the record, select **Check Integration Status** in the action dropdown 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 Integration` in the Quick Find box, then select **Data Integration Rules**.

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.

How Pricing Works on Work Orders

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

If you've set up a product catalog in Salesforce to track the goods and services your business offers, you can associate items in your price books with work orders and their line items, similar to the way you can associate products with opportunities or orders. If you specify a price book on a work order, this allows you to link each work order line item to a price book entry (product) from the price book.

For example, if you create a work order for a solar panel installation, select a price book in the Price Book lookup field on the work order. Then, use the Price Book Entry lookup field on its work order line items to select goods or services listed in your price book, such as Site Assessment, Solar Panel, and Inverter. A quick glance at a completed work order's line items shows you which products from your product catalog were sold as part of the work order.

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

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

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.

Work Order Line Item Field	What It Represents
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 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.

Operating Hours Considerations

Learn how operating hours work and how to assign them to people and regions.

Creating Operating Hours

To assign operating hours to a service territory, service territory member, or account, you must first create the operating hours from the Operating Hours tab.

By default, only System Administrators can view, create, and assign operating hours.

Assigning Operating Hours to Accounts

You can assign operating hours to an account via the Operating Hours field on the account detail page. An account's operating hours tell dispatchers 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.

If the Field Service Lightning managed package is installed in your org, the default operating hours used when booking an appointment for an account are set elsewhere. From the Field Service Settings tab, click **Global Actions**, then select **Appointment Booking** and update the operating hours listed there.

Assigning Operating Hours to Service Resourecs

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. Therefore, resources' operating hours are defined on their service territory member record. 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.

Service territory members 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.

> 💡 **Tip:** You can navigate to a service territory member record in two ways:
>
> - From the service resource detail page, find the Service Territories related list, then click the Member Number for the territory.
> - From a service territory detail page, find the Service Territory Members related list, then click the Member Number for the territory member whose hours you want to modify.

Enforcing Operating Hours

- 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.

- If you'd like, 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.

> 👁 **Example:** Henry is an electrician who mostly works in the San Francisco Bay Area, but is occasionally assigned to appointments in Sacramento. His primary service territory is San Francisco Bay Area, and his secondary service territory is Sacramento.
>
> Henry's operating hours in the San Francisco Bay Area are 8 AM to 5 PM, Monday through Friday. However, because Henry needs extra time to travel to and from Sacramento and wants to avoid Friday traffic, his operating hours in that territory are 10 AM to 3 PM, Monday through Thursday. Both service territories use the same operating hours: 6 AM to 6 PM, Monday through Friday.
>
> To reflect these hours in Salesforce, his Salesforce admin does the following:
>
> 1. Create three sets of operating hours from the Operating Hours tab, adding time slots for each day:

- *6 AM to 6 PM Monday – Friday*
- *8 AM to 5 PM Monday – Friday*
- *10 AM to 3 PM Monday – Thursday*

2. Add the first set of operating hours to the San Francisco Bay Area and Sacramento service territories via the Operating Hours field.

3. Add the second set of operating hours to Henry's service territory member record for the San Francisco Bay Area service territory via the Operating Hours field.

4. Add the third set of operating hours to Henry's service territory member record for the Sacramento service territory via the Operating Hours field.

Now, a dispatcher assigning service appointments to Henry knows which hours he is available to work in each territory.

FIELD SERVICE LIGHTNING GUIDELINES

Learn how and when to use Field Service Lightning features.

Guidelines for Setting Up Service Territories

Learn how to use service territories to track where your field service team works.

Guidelines for Setting Up Your Workforce

Learn how to manage your field service workforce with the help of service resources and service crews.

Guidelines for Using Work Orders

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

Guidelines for Using Service Appointments

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

Guidelines for Using Signatures on Service Reports

Field service technicians can capture signatures from customers and partners for service reports. The number and type of signatures on a service report are defined beforehand on the service report template.

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.

Common Tasks in Inventory Management

Learn how to perform everyday tasks in field service inventory management.

How Product Transfers Work

Product transfers track the transfer of inventory between locations in field service. Learn how to link product transfers to other inventory management records, and how they make it easy to manage inventory in both large and small field service operations.

How Product Consumption Works

When you consume products as part of a work order, logging the consumption in Salesforce kicks off several behind-the-scenes changes. Learn how product consumption fits into your field service operation.

Field Service Lightning Code Samples

Get started working programmatically with Field Service Lightning features.

Guidelines for Setting Up Service Territories

Learn how to use service territories to track where your field service team works.

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.

Adding Locations to Service Territories

You can associate location records with service territories from the Service Territory Locations related list on the service territory. Add site, plant, and warehouse locations to the service territory in which they're located. Add mobile locations, like vans, to the service territories where they can be used for field service work.

Guidelines for Setting Up Your Workforce

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
To create service crews:	Create on service crews
To create service resources representing crews:	Create on service resources
To assign service crews to service appointments:	Edit on service appointments

Learn how to manage your field service workforce with the help of service resources and service crews.

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
- Resources that belong to a service crew appear in the Service Crew Members related list on the service crew detail page

Creating Service Resources

Create service resources from the Service Resources tab. Service resources can represent users *or* groups of users (known as service crews). When creating service resources, follow these guidelines:

- To create a service resource that represents a user, select the user in the User lookup field and select a Resource Type of Technician.
- To create a service resource that represents a service crew, select the crew in the Service Crew field and select a Resource Type of Crew. Service resources that are crews can't be activated unless the crew has at least one active member.

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. Optionally, indicate which service crew a service resource belongs to in the Service Crew field on the assigned resource record.

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.

To deactivate a service resource, deselect **Active** on the service resource detail page. Service resources that belong to service crews can't be deactivated.

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.

Creating Service Crews

A service crew is a group of service resources whose combined skills and experience make them a good fit to work together on service appointments. For example, a wellhead repair crew might include a hydrologist, a mechanical engineer, and an electrician.

Create crews from the Service Crews tab. After you create a crew, add members to it from the Service Crew Members related list. Only active service resources of the Technician resource type can be added to crews.

The crews that a service resource belongs to appear in the Service Crews related list on the resource's detail page. You can also see all service crew memberships in the Service Crew Members tab in Salesforce. A service resource can be a member of multiple crews as long as the membership dates don't overlap.

> 📝 **Note:** Service crews aren't available in Salesforce mobile web, Salesforce for Android, or Salesforce for iOS. You can still view service resources of the Crew type, but clicking the value in the Service Crew field leads to an error.

Managing Crew Size

You can add crew size requirements to work types, work orders, and work order line items. The Recommended Crew Size and Minimum Crew Size fields guide dispatchers who are assigning service appointments. Work orders and work order line items inherit their work type's crew size values. If you enter a recommended crew size, you must enter a minimum crew size.

Assigning Crews to Service Appointments

Service appointments can only be assigned to service resources. Therefore, to assign a crew to a service appointment, you must create a service resource that represents the crew. From the Service Resources tab, click **New**. Select your crew in the Service Crew lookup field and select a Resource Type of Crew. Activate the service resource, fill out the other fields according to your needs, and save your changes.

Once your crew has a service resource to represent it, assign the crew to a service appointment from the Assigned Resources related list on the appointment. Select the representative service resource in the Service Resource field, and save your changes. The Assigned Resources related list now shows a single assignee.

Guidelines for Using Work Orders

USER PERMISSIONS		EDITIONS
To view the Work Orders tab, work orders, and work order line items:	Read on work orders	Available in: Salesforce Classic and Lightning Experience
To create or clone work orders:	Create on work orders	
To edit work orders:	Edit on work orders	Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
To delete work orders:	Delete on work orders	
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

View work orders from 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
- Maintenance plans
- Service contracts

> **Tip:** Add work orders to the console to view and edit work orders and their associated records in one place.

Creating Work Orders

Create and edit work orders from the Work Orders tab or the Work Orders related list on supported objects.

> **Tip:** When you create a work order, add line items to the work order from 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. You can define additional status values in Setup.

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

> **Note:** The default status values on 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 your org is older, existing status values

may have a status category of None which can't be updated. To change the status category from None for an existing status value, a little housekeeping in Setup is necessary.

Creating Child Work Orders

Work orders can have parent and child relationships with each other. Child work orders are standalone records that just happen to be associated with a parent work order. They 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 lets you track first-time rates and analyze cancellation 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.

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.

Guidelines for Using Service Appointments

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

Viewing Service Appointments

> View service appointments on the Service Appointments tab. 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.

> 📝 Note: The ParentRecordId field on service appointments can't be referenced in validation rules, workflow rules, or process flows. If you want to limit the available types of service appointment parent records, use an Apex trigger.

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 Read on service resources

Guidelines for Using Signatures on Service Reports

Field service technicians can capture signatures from customers and partners for service reports. The number and type of signatures on a service report are defined beforehand on the service report template.

Setting Up Signature Types

The Signature Type field on digital signatures represents the role of the person signing a service report. It helps you ensure that your service reports are signed by the proper people.

For example, suppose that whenever your company performs preventive maintenance on an asset, you want both the customer and the technician to sign the final service report. Those signatures tell you that everyone agrees on the work that was completed, and help prevent future squabbles.

Your org comes with just one signature type, Default. A service report template can only contain one signature per type. If you plan to collect multiple signatures on service reports, create additional signature types in Setup by editing the Signature Type picklist field on the Digital Signature object.

Create at least one value for every role that might need to sign a service report. For example, Technician, Customer, Supervisor, or Supplier. If you want some service reports to be signed by multiple people in one role—for example, all technicians present at an appointment—create numbered types: Technician 1, Technician 2, and so forth.

> ✏️ Note: You can create up to 1,000 signature types. You can't delete signature types, but you can deactivate them so they can't be used in service report templates. When you deactivate a type, it still appears on service report templates that used it, but you can't use it on new service report templates.

Adding Signature Blocks to Service Report Templates

To create or edit service report templates, in Setup, enter `Service Report Templates` in the Quick Find box, then select **Service Report Templates**.

To add a signature block to a service report template, open the service report template and drag the Signature element to the template layout. The signature block's settings display, which you can modify as needed. The Signature Type field is required in signature blocks. Make sure to also add the Signature field, which is the designated space for the signature. You can update the title of each signature block to reflect who is signing, or hide the title and field labels.

Dragging a signature element to a service report template layout displays its settings.

You can add up to 20 signature blocks to a service report template. Double-click the title of any signature block to display its settings.

Note: Because only one signature per type is allowed on a report, you can't drag additional signature blocks onto a template until you've defined additional Signature Type values. Signature blocks can't use multiple columns.

Capturing Signatures for Service Reports

Signatures are captured from the Field Service Lightning mobile app. Captured signatures aren't reused in future versions of the report.

For example, suppose a technician generates a service report for a service appointment and the customer signs the report. Then, the technician updates the service notes to add a recommendation. If the technician re-generates the service report, the customer's signature doesn't appear on the new report.

To reuse signatures across all service report versions, contact Salesforce.

Guidelines for Using Knowledge with Work Orders

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

Suggesting an Article

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

1. From Setup enter `Field Service` in the Quick Find box, then select **Field Service Settings** under Field Service.

2. In the work order and work order line item field lists, select which fields you want the search engine to use when suggesting relevant articles from your knowledge base.

3. Click **Save**.

Attaching an Article

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

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

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

Viewing an Attached Article

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

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

Detaching an Article

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

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

- Navigate to the record that the article is attached to. In the Articles related list, click **Detach** next to the article.

Updating an Attached Article

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

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

Managing Linked Articles

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

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

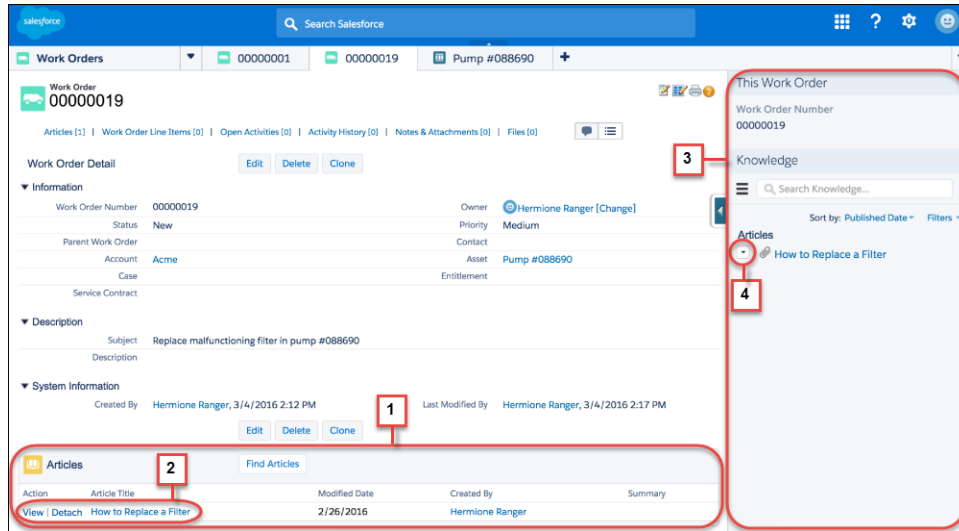To attach or detach an article on a work order or work order line item:
- Read on work orders AND Read on the article type AND Knowledge enabled

To edit page layouts:
- Customize Application

To edit console layouts:
- Customize Application AND Service Cloud User

(1) View and change the articles attached to a record from the Articles related list.

(2) View an article's properties by clicking **View**, or view the article itself by clicking its title. Click **Detach** to remove the article from the record.

(3) The Knowledge One widget in the console sidebar lets you manage attached articles, view suggested articles, and search the Knowledge base.

(4) Each article's action menu contains the option to attach or detach it.

⚠️ Warning:

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

Common Tasks in Inventory Management

Learn how to perform everyday tasks in field service inventory management.

This table explains at a high level how to complete common tasks using Salesforce's out-of-the-box inventory management features. For more detailed step-by-step instructions, refer to the provided links.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

I Want To...	How To Do It	Example
Track the quantity of a particular product stored at a particular location	Create a product item record associated with the product and the location, and specify the quantity stored there. Helpful links: • Create Parts	To track the number of wheelbarrows stored at Warehouse B, create a product item whose Location is Warehouse B and Product is Wheelbarrow.
Find out what's in a particular location's inventory	Look at the Product Items related list on the location record. Helpful links: • Create Field Service Locations	To find out what is stored in Warehouse A, look at the Product Items related list on the Warehouse A location record.
Find out the quantity of a particular part across all inventory locations	Look at the Product Items related list on the product record. Helpful links: • Create Parts	To find out how many wheelbarrows you have in your inventory and where they are stored, look at the Product Items related list on the Wheelbarrow product record.
Review changes to the stock of a particular product at a particular location	Look at the Product Item Transactions related list on the product item. Helpful links: • How Product Transfers Work	To review the use, transfer, and restock of extra-large bolts at Warehouse C, look at the Product Item Transactions related list on the product item whose Product is Extra-Large Bolt and Location is Warehouse C.
Specify that a certain part is needed to complete a work order	Create a record in the Products Required related list on the work order. Helpful links: • Track Required Parts	To let the assigned technicians know that they will need a forklift to complete work order #00046982, create a product required for the Forklift product on the work order.
Request more parts from another inventory location when my stock gets low	Create a product request to indicate what's needed. Create a product request line item for each product requested. Helpful links: • Request Parts	To request a restocking of 20 boxes of nails and 10 hammers for your service vehicle, Van A, create a product request for the Van A location. Include one product request line item for the nails, and another for the hammers.
Transfer parts between inventory locations	1. Create a product transfer. Make sure to specify the quantity, source location, destination location, and source product item (which represents the stock that the items are being transferred from). 2. Create a shipment to track the transfer's shipping details. 3. Mark the product transfer received when the items arrive. Helpful links:	To transfer 25 tires from Warehouse A to Warehouse B, create a product transfer with these settings: • Source Location: Warehouse A • Source Product Item: Warehouse A Tires • Destination Location: Warehouse B • Quantity: 25 • Quantity Unit of Measure: Each Create a shipment to track the shipping details for the tire transfer.

I Want To...	How To Do It	Example
	• Transfer Parts • How Product Transfers Work	Select **Received** on the product transfer when the tires arrive at Warehouse B.
Transfer parts from an outside vendor to an inventory location	1. Create a product request, listing the outside vendor as the account. 2. Create a product transfer. Make sure to specify the quantity, destination location, and product. 3. Create a shipment to track the transfer's shipping details. 4. Mark the product transfer received when the items arrive. Helpful links: • Request Parts • Transfer Parts • How Product Transfers Work	To transfer 20 safety glasses from your safety equipment provider to Service Van A, create a product request that lists your outside vendor as the Account. Then, create a product transfer with these settings: • Product: Safety Glasses • Destination Location: Service Van A • Quantity: 20 • Quantity Unit of Measure: Each Because the items are coming from outside of your inventory, leave the Source Location and Source Product Item blank. Create a shipment to track the shipping details for the glasses transfer. Select **Received** on the product transfer when the glasses arrive at Service Van A.
Indicate that parts from your inventory were consumed while completing a work order	Create a product consumed record on the related work order. Helpful links: • Track Consumed Parts • How Product Consumption Works	You used 15 bolts from your service van, Service Van A, to complete work order #00046982. To track the consumption, create a product consumed record on the work order with these settings: • Product Item: Service Van A Bolts • Quantity Consumed: 15 The product item quantity is automatically reduced by 15 to reflect that the bolts are no longer in stock.

How Product Transfers Work

Product transfers track the transfer of inventory between locations in field service. Learn how to link product transfers to other inventory management records, and how they make it easy to manage inventory in both large and small field service operations.

Associating Product Transfers with Product Requests

While product transfers are typically created in response to a product request, they don't have to be. For example, when a new technician joins your team, you might create a series of product transfers to track the initial stocking of their service vehicle.

If the product transfer is fulfilling a product request, create one product transfer for each product request line item. This way, you can track the status of each part being requested. The Product Transfers related list on a product request

> **EDITIONS**
>
> Available in: Salesforce Classic and Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

lists all product transfers associated with the request's line items. In addition, product request line items have their own Product Transfers related list that shows related transfers.

Associating Product Transfers with Shipments

To get more visibility into the movement of inventory between locations, create shipments and link them to product transfers. Shipments contain information about the products on board, the shipping carrier, and the expected delivery date. While shipments are an optional part of inventory management, they make it easier to stay informed about the coming and going of parts in your inventory.

For example, suppose you create a product request for 50 hammers and 40 boxes of nails at Warehouse C. The product request has two line items: one for the hammers, and one for the nails. To fulfill the request, your inventory manager creates two product transfers—one for each product request line item—that indicate that the hammers and nails should be transferred from Warehouse B. Then, he creates a shipment to track the transfer, and enters it in the Shipment field on both product transfers. Now, anyone looking at the product request can see the related product transfers, and refer to their related shipment to find out where the hammers and nails are on their inter-warehouse journey.

Updating or Deleting Product Transfers

If a product transfer hasn't yet been marked received, you can edit it normally. Received transfers cannot be updated, but you can delete them if needed. When you delete a transfer:

- The Quantity on Hand of the source and destination product items reverts to the pre-transfer quantity

- Product item transactions with a transaction type of Adjusted are added to the source and destination product items

Marking Product Transfers Received

When you select **Received** on a product transfer, that indicates that the items have been added to the inventory at their destination location. Marking a product transfer received causes several record updates that keep your inventory numbers accurate:

- **Product items are updated or created.** Product items track the quantity of a particular product at a particular location—for example, a product item can represent all of the hammers at Warehouse A. When a product is transferred from one location to another, the quantity of the source location product item is reduced to reflect the transfer. In addition, one of two things happens:

  - If there's already a product item that represents the transferred products stored at the destination location, the quantity of that product item is increased to reflect the transfer.

  - If such a product item doesn't exist (in other words, if it's the first time that the product is being stored at the location), a product item is automatically created that reflects the quantity transferred there.

  For example, if Service Van B has never contained any hammers, there probably isn't a product item record representing the hammers stored at Service Van B. In that case, when hammers are transferred to Service Van B, a product item is automatically created whose quantity reflects the number of hammers transferred there.

- **Product item transactions are created.** When you mark a transfer received, a product item transaction with a type of "Transferred" is created to represent the addition of stock at the destination location. If a source location or soure product item is specified, a second transaction is created to represent the removal of stock from the source location. The first transaction's quantity is positive because stock is being added; the second transaction's quantity is negative. These transactions appear in the Product Item Transactions related list on the related product transfer, source product item, and destination product item. They let you quickly review past transactions at your inventory locations.

  👁 Example: Warehouse A has 100 hammers in stock. Your new technician, Jessica, has just received her service van, and you've created a location to represent the van in Salesforce. You create a product transfer to track the transfer of 5 hammers from Warehouse

A to Jessica's van. Since Jessica's van hasn't contained hammers before, selecting Received on the transfer causes the following events.

- The quantity on the existing product item for hammers stored at Warehouse A is reduced from 100 to 95
- A second product item is created with these settings:
  - Product: Hammer
  - Quantity: 5
  - Location: Jessica's Van

- A product item transaction is created for the hammer product item with a transaction type of Transferred and a quantity of 5

How Product Consumption Works

When you consume products as part of a work order, logging the consumption in Salesforce kicks off several behind-the-scenes changes. Learn how product consumption fits into your field service operation.

How to Track Product Consumption

When a technician uses a product during a field visit, they can create a product consumed record from the Products Consumed related list on the related work order or work order line item. For example, a work order might have one product consumed record representing the consumption of 10 bolts, and another representing the consumption of 2 batteries. Products consumed are typically associated with a *product item* that represents where the item was stored before use.

Why to Track Product Consumption

Tracking product consumption in Salesforce helps you know when and why items from your inventory are used, and when your stock is running low. When you create a product consumed record on a work order or work order line item, the quantity listed on the related product item updates automatically to reflect the consumption.

For example, suppose you have a product item representing the bolts stored in your service van. You use 10 bolts to complete a work order, so you create a product consumed record on the work order to track the consumed bolts. Creating the product consumed reduces the quantity of the product item representing bolts in your van by 10, and makes it easy to keep an eye on inventory levels.

📝 Note: If you want your team to log product consumption but aren't interested in tracking the movement of inventory between locations, you can skip creating locations and product items and just fill in the Price Book Entry field on product consumed records to indicate which product was consumed. However, this approach offers a limited view of your inventory.

Viewing Updates to Product Consumed Records

Product item transactions are auto-generated records that reflect changes made to product items in your org. They appear in the Product Item Transactions related list on related records. Most actions that you take on products consumed result in a product item transaction:

- **Creating a product consumed:** A product item transaction is created on the product item with a type of Consumed and a negative quantity equal to the quantity consumed. Because access to product item transactions is determined by product item access, you need permission to view product items before you can create products consumed.

- **Changing the quantity on a product consumed**: You may need to change the quantity on a product consumed to indicate that fewer or more items were consumed. In this case, a product item transaction is created with a type of Adjusted and a negative quantity equal to the additional quantity consumed. For example, if a technician updates a product consumed to indicate that two additional bolts were used, the new product item transaction's quantity would be –2.
- **Deleting a product consumed**: This is viewed as another type of adjustment. A product item transaction of type Adjusted is created with a positive quantity equal to the quantity consumed.

Field Service Lightning Code Samples

Get started working programmatically with Field Service Lightning features.

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.

Create a Service Report with Apex

The **Create Service Report** action on work orders, work order line items, and service appointments can also be called using Apex code. The following code sample creates a service report with two signatures by making an Apex callout to the `createServiceReport` action REST API resource.

Apex Code Samples for Work Orders

Customize and automate the role of work orders in your support process.

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)
- 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/v41.0/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());
}
```

Create a Service Report with Apex

The **Create Service Report** action on work orders, work order line items, and service appointments can also be called using Apex code. The following code sample creates a service report with two signatures by making an Apex callout to the *createServiceReport* action REST API resource.

Each service report contains data from its parent record and signatures from customers, technicians, or others who need to sign off on the work. In your API call, you can define one or more signatures to be used in the report. The number and type of signatures must match the service report template's signature settings.

📝 Note:

- This code sample applies to API version 41.0 and later. Service reports generated with API version 40.0 can contain only one signature.

- 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 record ID in the code sample is *0WOxx000000001E*. The mock service report template ID is *0SLR00000004DBFOA2*.

API Endpoint (v41.0): /services/data/v41.0/actions/standard/createServiceReport

```
{
   "inputs" : [ {
      "entityId" : "0WOxx000000001E",
         "signatures" : [
                   {"data":"Base64 code for the captured signature image",
                    "contentType":"image/png",
                    "name":"Customer Signature",
                    "signatureType":"Customer",
                    "place":"San Francisco",
                    "signedBy":"John Doe",
                    "signedDate":"Thu Jul 13 22:34:43 GMT 2017"
                    },
                   {"data":"Base64 code for the captured signature image",
```

```
                    "contentType":"image/png",
                    "name":"Technician Signature",
                    "signatureType":"Technician"
                    }],
            "templateId" : "0SLR00000004DBFOA2"
    } ]
  }
```

Field Descriptions

- entityId—The ID of the work order, work order line item, or service report for which you want to create the service report.
- signatures—A list of JSON definitions for a digital signature.

  - data—(Required) The base64 code for an image.
  - contentType—(Required)The file type of the signature.
  - signatureType—(Required) The role of the person signing; for example, "Customer." Signature Type picklist values are defined by the Salesforce admin ahead of time. Each signature block must use a different signature type, and the signature types you define in your call must match the service report template's signature types.
  - name—The signature block title. This value appears on the generated service report.
  - place—The place of signing. This value appears on the generated service report.
  - signedBy—The name of the person signing. This value appears on the generated service report.
  - signedDate—The date of signing. This value appears on the generated service report.

- templateId—The ID of the service report template used for the report. To find the ID, run a SOQL query on the ServiceReportLayout object in Workbench.

Apex Code Samples for Work Orders

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Sample Trigger 1

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

To define a work order trigger in your org:

1. From Setup, enter `Work Orders` in the Quick Find box, then click **Triggers** under Work Orders.

2. Click **New**.

3. Copy the trigger text and paste it into the text field.

4. Click **Save**.

```
trigger ValidateWorkOrderLineItem on WorkOrder (before update) {
    for(WorkOrder w : Trigger.New) {
        if(w.Status =='Closed'){
            List<WorkOrderLineItem> woLineItemList = [Select wo.Status
                            From WorkOrderLineItem wo where wo.WorkOrderId=:w.Id];
            if(woLineItemList.isEmpty()==false){
                for(WorkOrderLineItem woLineItem : woLineItemList){
```

```
                            if(woLineItem.Status != 'Closed'){
                                  w.addError('You cannot close a work order until all of its
line items are closed.');
                            }
                      }
                }
          }
      }
}
```

Sample Trigger 2

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

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

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

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

Location Fields
Locations, addresses, and associated locations have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

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

Service Crew Fields
Service crews and service crew members have the following fields. Depending on your page layout and field-level security settings, you may not be able to view or update some of them.

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.

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.

Time Sheet 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.

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

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

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

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

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

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.

Product items, product item transactions, products required, and products consumed have the following fields. Some fields might not be visible or editable depending on your page layout and field-level security settings.

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

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

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

EDITIONS

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

Field Name	Description
	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 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

Field Name	Description
	• Secondary territories:
	– East Chicago
	– South Chicago
	• Relocation territory: Manhattan, for a three-month period

Service Territory Location

Service territory locations represent locations that belong to a service territory, such as a warehouse located inside a territory.

Field Name	Description
Location	The related location.
Service Territory	The related service territory.
Service Territory Location Number	An auto-generated number identifying the territory location.

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.

Location

Locations in field service can be associated with products items to track inventory stored at the location. They have the following fields.

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.
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.

Field Name	Description
Location Level	The location's position in a location hierarchy. If the location has no parent or child locations, its level is 1. Locations that belong to a hierarchy have a level of 1 for the root location, 2 for the child locations of the root location, 3 for their children, and so forth.
Location Name	Location name. For example, Service Van #4.
Location Type	Picklist of location types, which can be customized. The values are: • Warehouse (default) • Site • Van • Plant
Mobile Location	Indicates whether the location moves. For example, a truck or tool box.
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.
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.
Root Location	(Read Only) The top-level location in the location's hierarchy.
Time Zone	Picklist of available time zones.
Vistor Address	Lookup to an account's or client's address.

Address

Addresses are mailing, billing, or home addresses, typically associated with a location. They have the following fields.

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

Field Name	Description
Description	A brief description of the address.
Driving Directions	Directions to the address.
Location Type	The type of location associated with the address, which is automatically filled in. 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 represent a relationship between an account and a location. Multiple accounts can be associated with a location; for example, a shopping mall location might be related to several accounts. They have the following fields.

Field Name	Description
Account Name	The account associated with the location.
Active From	Date and time the location starts being associated with the account.
Active To	Date and time when the location is no longer associated with the account.
Associated Location Name	(Read Only) Auto-generated number for the association.
Location Name	A lookup field to the associated location.
Type	Picklist of address types. The values are: • Bill To • Ship To

Service Resource Fields

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

Service Resource

Service resources represent individual users or groups of users (known as service crews) 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.
Location	The location associated with the service resource. For example, a service vehicle driven by the service resource.
Name	The resource's name. This might be the name or title of the associated user or crew.
Resource Type	Indicates whether a resource is a technician, dispatcher, or crew. Resources who are dispatchers can't be capacity-based or included in scheduling optimization. Only users with the Field Service Dispatcher permission set license can be dispatchers. ✏️ Note: You can't add additional resource types.

Field Name	Description
Service Crew	The associated service crew. If the service resource represents a crew, select the crew. 📝 Note: This field is hidden for all users by default. To use it, update its field-level security settings in Setup and add it to your service resource page layouts.
User	The associated user. If the service resource represents a crew instead of a single user, leave this field blank.

Resource Absence

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

Field Name	Description
Absence Number	(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.

Field Name	Description
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.

Assigned Resource

Assigned resources are service resources who are assigned to a service appointment. They appear in the Assigned Resources related list on service appointments. Assign a service appointment to a service crew by creating an assigned resource record that is linked to the service resource record representing the crew.

Field Name	Description
Actual Travel Time (Minutes)	The actual travel time in minutes to the work site.
Assigned Resource Number	An auto-generated number identifying the assigned resource.
Estimated Travel Time (Minutes)	The estimated travel time in minutes to the work site. 📝 Note: If the resource represents a crew, you can't track individual crew members' travel time unless you create an assigned resource record for each crew member.
Service Appointment	The related service appointment.
Service Crew	The service crew assigned to the appointment. Typically, appointments are assigned to crews by creating an assigned resource record that links to the service crew record. If you're using that approach, you can leave the Service Crew field blank. If you want to assign an appointment to crew members individually so you can track each member's travel time, create an assigned resource record for each crew member that has both the User and Service Crew fields completed. This field is hidden for all users by default. To use it, update its field-level security settings in Setup and add it to your assigned resource page layouts.
Service Resource	The service resource assigned to the appointment.

Resource Preference

Resource preferences indicate which service resources should be assigned to field service work. 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.

Field Name	Description
Preference Type	- Preferred: Indicates that the customer would like their field service work assigned to the resource - Required: Indicates that the resource must be assigned to the customer's field service work - Excluded: Indicates that the customer does not want their field service work assigned to the resource 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.
Related Record	The work order or account with the resource preference.
Resource Preference Number	An auto-generated number identifying the resource preference.
Service Resource	The service resource that is preferred, required, or excluded.

Service Crew Fields

Service crews and service crew members have the following fields. Depending on your page layout and field-level security settings, you may not be able to view or update some of them.

Service Crew

Service crews are groups of users who can be assigned to a service appointment as a unit.

Field Name	Description
Crew Size	The number of members on the crew. This field is manual, so it doesn't auto-update when you add or remove members.
Name	The name of the service crew. For example, Repair Crew.
Owner	By default, the person who created the service crew.

Service Crew Member

Service crew members are service resources who belong to a service crew. Add members to a service crew from the Service Crew Members related list on the crew record.

Field Name	Description
End Date	The last day that the service resource belongs to the crew. You can use this field to track employment dates for contractors.

Field Name	Description
Leader	Indicates that the member is the crew leader.
Name	The name of the crew member. Depending on your preference, you can enter the service resource's name or their role in the crew.
Service Crew	The crew that the service resource belongs to.
Service Resource	The service resource that belongs to the crew.
Start Date	Required. The day the service resource joins the crew.

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.

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.

Field Name	Description
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 13.
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.

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.

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, or 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.
Type	The type of time slot. Possible values are Normal and Extended. You may choose to use Extended to represent overtime shifts.

Time Sheet 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.

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.
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

Field Name	Description
	• 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

Field Name	Description
	• 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.

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.

Field	Description
Duration	The estimated time required to complete the work order. Specify the duration unit in the Duration Type field. 📝 **Note:** Work order duration and work order line item duration are independent of each other. If you want work order duration to automatically show the sum of the work order line items' duration, replace the Duration field on work orders with a custom roll-up summary 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.
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.
Location	The location associated with the work order. For example, a work site.
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.

Field	Description
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
Minimum Crew Size	The minimum crew size allowed for a crew assigned to the work order. If you're not using the Field Service Lightning managed package, this field serves as a suggestion rather than a rule. If you are using the managed package, the scheduling optimizer counts the number of service crew members on a service crew to determine whether it fits a work order's minimum crew size requirement.
Owner	The work order's assigned owner.
Parent Work Order	The work order's parent work order, if it has one. 💡 Tip: View, create, and delete a work order's child work orders in the Child Work Orders related list.
Postal Code	The postal code where the work order is completed. Maximum length is 20 characters.
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
Recommended Crew Size	The recommended number of people on the service crew assigned to the work order.
Record Type	The record type associated with the work type.

Field	Description
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 Appointment Count	The number of service appointments on the work order.
Service Contract	The service contract associated with the work order.
Service Report Template	The service report template that the work order's service reports should use.
	If you don't specify a service report template on a work order, it uses the service report template listed on its work type. If the work type doesn't list a template or no work type is specified, the work order uses the default service report template.
	Note: This field stays blank unless you update it on the work order. So to find out which template the work order's service reports will use, check its work type.
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 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

Field	Description
	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.
Stopped	Indicates the the milestone countdown has been paused.
Stopped Since	The time the milestone countdown was paused.
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.

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. 📝 Note: Work order duration and work order line item duration are independent of each other. If you want work order duration to automatically show the sum of the work order line items' duration, replace the Duration field on work orders with a custom roll-up summary 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.

Field	Description
	A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
Is Closed	Indicates whether the line item has been closed. Changing the line item's status to 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.
Minimum Crew Size	The minimum crew size allowed for a crew assigned to the line item. If you're not using the Field Service Lightning managed package, this field serves as a suggestion rather than a rule. If you are using the managed package, the scheduling optimizer counts the number of service crew members on a service crew to determine whether it fits a line item's minimum crew size requirement.
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 line item. 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 parent work order's price book.
Quantity	The line item's quantity.

Field	Description
Recommended Crew Size	The recommended number of people on the service crew assigned to the line item.
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 Report Template	The service report template that the line item's service reports should use. If you don't specify a service report template on a work order line item, it uses the service report template listed on its work type. If the work type doesn't list a template or no work type is specified, the line item uses the default service report template. 📝 Note: This field stays blank unless you update it on the line item. So to find out which template the line item's service reports will use, check its work type.
Service Territory	The service territory where the line item work is taking place.
Start Date	The date when the line item goes into effect.
Status	The status of the line item. The picklist includes the following values, which can be customized: • 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.

Field	Description
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

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

Field Name	Description
	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.
Minimum Crew Size	The minimum crew size allowed for a crew assigned to records using the work type.
	If you're not using the Field Service Lightning managed package, this field serves as a suggestion rather than a rule. If you are using the managed package, the scheduling optimizer counts the number of service crew members on a service crew to determine whether it fits a record's minimum crew size requirement.
	Note: This field is hidden for all users by default. To use it, update its field-level security settings and add it to your work type page layouts.
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."
Recommended Crew Size	The recommended number of people on the service crew assigned to the record using this work type.
	Note: This field is hidden for all users by default. To use it, update its field-level security settings and add it to your work type page layouts.
Service Report Template	The service report template associated with the work type.
	If you choose not to specify a service report template on a work order, it uses the service report template listed on its work type. If the work type doesn't list a template or no work type is specified, the work order uses the default service report template. The same is true for work order line items.

Service Appointment Fields

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

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

Field Name	Description
	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. The parent record can't be updated after the service appointment is created.
Parent Record Status Category	(Read only) The Status Category of the parent record. If the parent record is a work order or work order line item, this field is populated; otherwise, it remains blank.
Parent Record Type	(Read only) The type of parent record: Account, Asset, Opportunity, Work Order, or Work Order Line Item.
Scheduled End	The time at which the appointment is scheduled to end. If you are using the Field Service Lightning managed package with the scheduling optimizer, this field is populated once the appointment is assigned to a resource. Scheduled End – Scheduled Start = Estimated Duration.
Scheduled Start	The time at which the appointment is scheduled to start. If you are using the Field Service Lightning managed package with the scheduling optimizer, this field is populated once the appointment is assigned to a resource.
Service Note	Add notes such as an appointment summary or recommendations for future work. Depending on your settings, these notes might appear on a customer-facing service report.
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.

Field Name	Description
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.
Work Type	The work type associated with the service appointment.

Service Report Fields

Service reports and digital signatures on 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 Report

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.

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.

Digital Signature

Digital Signatures are signatures captured on service reports. They might be signatures from customers, technicians, or anyone else involved in field service work.

Field Name	Description
Date Signed	The date of the signing.
Parent Record	The service appointment, work order, or work order line item that the service report belongs to.
Place Signed	The place where the service report was signed.
Signature Image	The image of the signature.
Signature Number	An auto-generated number identifying the signature.
Signature Type	The role of the person signing. It comes with one value, Default. Service reports can have one signature per type, so your admin needs to create additional signature types in Setup. Create at least one value for every role that might need to sign a service report. For example, Technician, Customer, Supervisor, or Supplier. If you want some service reports to be signed by multiple people in one role—for example, if all technicians present at an appointment should sign—create numbered types: Technician 1, Technician 2, and so forth.
Signed By	The name of the person signing.

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.

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.
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.
Generation Timeframe	(Required) How far in advance work orders are generated in each batch. The unit is specified in the Generation Timeframe Type field.

Field Name	Description
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.
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.

Field Name	Description
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.
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.

Parts and Inventory Fields

Product items, product item transactions, products required, and products consumed have the following fields. Some fields might not be visible or editable depending on your page layout and field-level security settings.

Product Item

Product items track the quantity of a particular product at a location. They have the following fields.

Field Name	Description
Location	Location associated with the product item. This usually indicates where the product item is stored.
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 quantity at the location. If you want to add a serial number, this value must be 1.
Quantity Unit of Measure	Units of the product item; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.

Field Name	Description
Serial Number	A unique number for identification purposes. If you want to enter a serial number, the Quantity on Hand must be 1. 💡 **Tip:** To learn more about the pros and cons of assigning serial numbers to product items, see Create Parts.

Product Item Transaction

Product item transactions describe actions performed on a product item. They're auto-generated records that help you track when a product item is replenished, consumed, or adjusted. They have the following fields.

Field Name	Description
Description	A description of the transaction. The description is blank when the transaction record is created, but can be updated.
Product Item	The associated product item.
Product Item Transaction Number	(Read Only) Auto-generated number identifying the product item transaction.
Quantity	The quantity of the product item involved in the transaction. If inventory was consumed, the quantity is negative.
Related Record	(Read Only) The product consumed or product transfer related to the action. If the action wasn't related to consumption or transfer, the related record is blank.
Transaction Type	The action that the transaction tracks. • Replenished: When a part is stocked or restocked at a location. A Replenished transaction is created when a product item is created or a transfer is marked received. • Consumed: When parts are consumed to complete a work order. A Consumed transaction is created when a record is added to the Products Consumed related list on a work order or work order line item. • Adjusted: When there is a discrepancy or a change in consumption. An Adjusted transaction is created when a product item's Quantity on Hand is edited, a product consumed is updated or delete, or a product transfer is deleted. • Transferred: When parts are transferred from one location to another.

Product Required

Products required are products that are needed to complete a work order or work order line item. You can add products required to work orders, work order line items, and work types. They have the following fields.

Field Name	Description
Parent Record	Associated work order or work order line item.
Parent Record Type	Indicates whether the parent record is a work order or a work order line item.
Product Required	Name of the required product.
Product Required Number	Auto-generated number identifying the product required.
Quantity Required	Amount required of the product.
Quantity Unit of Measure	Units of the required product; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.

Product Consumed

Products consumed are items from your inventory that were used to complete a work order or work order line item. They have the following fields.

📝 Note: To create or delete products consumed, you need permission to create product items.

Field Name	Description
Description	Notes and context about the product consumed.
Price Book Entry	Price book associated with the product consumed. If the work order and the product item's associated product are related to the same price book, the Price Book Entry auto-populates based on the product item.
Product	Product associated with the product consumed.
Product Consumed Number	(Read Only) Auto-generated number identifying the product consumed.
Product Item	Product item associated with the product consumed. Creating a product consumed record subtracts the quantity consumed from the linked product item's quantity.
Quantity Consumed	The quantity of products consumed.
Quantity Unit of Measure	Units of the consumed item; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
Unit Price	The price per unit of the product consumed.
Work Order	Work order associated with the product consumed.
Work Order Line Item	Work order line item associated with the product consumed.

Part Request and Transfer Fields

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

Product Request

Product requests represent a part or parts ordered. They have the following fields.

Field Name	Description
Account	The account associated with the product request.
Case	The case associated with the product request.
Description	Notes or context about the request.
Destination Location	Where the product is delivered.
Need By Date	Date the product must be delivered by.
Owner	The owner of the product request.
Product Request Number	(Read Only) An auto-generated number that identifies the product request.
Shipment Type	The type of shipment. The picklist includes the following values, which can be customized: • Rush • Overnight • Next Business Day • Pick Up
Ship To Address	The physical address where the product is delivered. For example, the mailing address of the warehouse that is requesting the product.
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: • Draft: Finalizing the product request details. • Submitted: The product request is ready for processing. • Received: The department in charge of fulfilling the request is working on it.
Work Order	The work order associated with the product request.

Field Name	Description
Work Order Line Item	The work order line item associated with the product request.

Product Request Line Item

Product request line items are subdivisions of a product request. Each line item is associated with a specific product being requested. They have the following fields.

Field Name	Description
Account	The account associated with the product request line item.
Case	The case associated with the product request line item.
Description	Notes and context about the request.
Destination Location	Where the product is delivered.
Need By Date	Date the product must be delivered by.
Parent	The product request that the line item belongs to.
Product	The product being requested.
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, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
Shipment Type	The type of shipment. The picklist includes the following values, which can be customized: • 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: • Draft • Submitted • Received
Work Order	The work order associated with the product request line item.

Field Name	Description
Work Order Line Item	The work order line item associated with the product request line item.

Product Transfer

Product transfers track the transfer of product items between inventory locations. They have the following fields.

Field Name	Description
Description	Notes or context about the transfer.
Destination Location	The location where the product is to be delivered.
Expected Pickup Date	Date the product is expected to be picked up.
Owner	Owner of the product transfer.
Product Name	The product associated with the product transfer. If the product is being transferred from outside your inventory--for example, if it's being ordered from a manufacturer--enter a product name. Otherwise, we recommend entering a source product item.
Product Request	The product request associated with the product transfer. Not all transfers are created in response to a product request.
Product Request Line Item	The product request line item associated with the product transfer. Create a separate transfer for each line item on a product request.
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, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
Received	Indicates that the product was received. To mark a product transfer received, you need permission to update product items. Once you mark a product item received, you can't undo it.

📝 Note: To find out what happens when a product transfer is marked received, see How Product Transfers Work. |
Received By	The contact who received the product at the destination location.
Shipment	The shipment related to the product transfer.
Shipment Expected Delivery Date	The expected date of delivery, inherited from the related shipment.
Shipment Status	The shipment status, inherited from the related shipment. It includes the following values, which can be customized:

• Shipped |

Field Name	Description
	• Delivered
Shipment Tracking Number	The shipment tracking number, inherited from the related shipment.
Shipment Tracking URL	The shipment tracking URL, inherited from the related shipment.
Source Location	The location where the product is coming from.
Source Product Item	The product item representing the stock at the source location. Enter a source product item if the product is being transferred from a location within your inventory, such as a warehouse. Specifying a source product item on a product transfer automatically updates the quantity at the source location to reflect the transfer.
	If the product is being transferred from outside your inventory—for example, if it's being ordered from a manufacturer—enter a product name instead.
Status	Status of the product transfer. It includes the following values, which can be customized:
	• Ready for Pickup
	• Completed

Shipment

A shipment tracks a product item while it is in transit. They have the following fields.

Field Name	Description
Actual Delivery Date	Date the product was delivered.
Delivered To	The person or entity the product was delivered too.
Description	Notes or context about the shipment.
Destination Location	The place the product is to be delivered.
Expected Delivered Date	Date the product is expected to be delivered.
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.

Field Name	Description
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 destination location.
Tracking Number	Tracking number for the shipment.
Tracking URL	URL of website used for tracking the shipment.

Linked Article Fields

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

Field	Description
Article ID	The ID of the linked article record, which is created when an article is attached to a record.
Article Title	The title of the attached article.
Article Version	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 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

Field	Description
	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 MANAGED PACKAGE

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

The Field Service Lightning managed package is translated into the 32 Salesforce supported languages and includes the following features.

Scheduling and optimization

A robust toolbox of work rules and scheduling policies optimizes resource assignments, taking skills, location, and your business objectives into account.

Administration app

Admins can integrate and maintain scheduling policies, global actions, sharing tools, and optimization rules all in one place.

Automatic user permission setup and updates

Set up your field service user permissions and keep them updated with the click of a button.

Dispatcher console

The console's appointment lists, scheduling actions, Gantt chart, and interactive map give dispatchers and supervisors a bird's-eye view of all service appointments. Dispatchers can ensure that the right job is routed to the right mobile employee and immediately see alerts for issues that need attention and take action. Schedule bulk jobs with just one click, and track and monitor service delivery in real time.

> **Note:** Before installing the Field Service Managed package, enable Field Service Lightning.

1. Install the Field Service Lightning Managed Package

   If your Salesforce org has Field Service Lightning enabled, you can install the managed package and build on standard field service features.

2. Set up the Field Service Lightning Managed Package

   After you install the Field Service Lightning managed package, you must create and permission sets and ensure page layouts, geocodes, and data integration rules are configured correctly.

3. Field Service Lightning Managed Package Customization

   Learn the concepts behind the features in the Field Service Settings tab and how to adjust them to your needs.

4. Field Service Lightning Dispatcher Console

   The Field Service Lightning Managed Package includes the Dispatcher Console, which is the main working space for dispatchers.

Install the Field Service Lightning Managed Package

If your Salesforce org has Field Service Lightning enabled, you can install the managed package and build on standard field service features.

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

1. Click the appropriate installation link on the download page
`https://fsl.secure.force.com/install`.

You can install on a production org or a sandbox org.

2. Select **Install for Admins Only**.

If you receive a request to approve third-party access, click **Yes** and **Continue**. This request allows Salesforce to collect the latitude and longitude values for service addresses so that the service scheduling optimizer can function.

3. If you get a message notifying you that the installation is taking longer than expected, click **Done**.

Once the installation is complete, you will receive an email notification.

After the package is installed, two new apps are included in the Apps Launcher. The Field Service app is for dispatchers, and the Field Service Admin app is for administrators. You can also add the Field Service and Field Service Settings tabs to other existing apps.

Set up the Field Service Lightning Managed Package

After you install the Field Service Lightning managed package, you must create and permission sets and ensure page layouts, geocodes, and data integration rules are configured correctly.

It is recommended your service territories are set up with their operating hours and members assigned. For faster set up, your work types and service resource skills should also be configured.

Create Permission Sets with the Field Service Lightning Managed Package
Configure and update permission sets with a click of a button.

Assign Permissions with the Field Service Lightning Managed Package Permission Sets
Give your users the permissions they need to complete their field service tasks.

Assign Page Layouts from the Field Service Lightning Managed Package
Update page layouts of field service objects for profiles used for field service lightning.

Manage Geocodes and Data Integration Rules for the Field Service Lightning Managed Package
Ensure your data integration rules are set up so that the closet qualified resource can deliver field service.

Create Permission Sets with the Field Service Lightning Managed Package

Configure and update permission sets with a click of a button.

1. In the App Launcher, select the **Field Service Admin** app.

2. Select the **Field Service Settings** tab.

3. Click **Getting Started** from the left-side panel.

4. Click **Permission Sets**.

5. Click **Create Permissions** on the **FSL Admin** tile.

   Two permission sets are created: FSL Admin License and FSL Admin Permissions. These permissions allow users to access and manage all Field Service Lightning objects, including the Field Service Lightning Visualforce pages and logic services.

6. Click **Create Permissions** on the **FSL Agent** tile.

   Two permission sets are created: FSL Agent License and FSL Agent Permissions. These permissions allow users to view all global actions and their related objects to create, book, and schedule service appointments.

7. Click **Create Permissions** on the **FSL Resource** tile.

   Three permission sets are created: FSL Mobile License, FSL Resource License, and FSL Resource Permissions. These permissions allow users to view and manage service appointments and their related parent objects.

8. Click **Create Permissions** on the **FSL Dispatcher** tile.

Three permission sets are created: FSL Dispatcher License and FSL Dispatcher Permissions. These permissions allow users to access and manage the dispatcher console, global actions and their related objects, and schedule optimize and dispatch service appointments.

The app updates this permission sets for you. If you have extended the permissions sets, they are not overridden. You must assign these permission sets to your users according to their requirements.

Assign Permissions with the Field Service Lightning Managed Package Permission Sets

Give your users the permissions they need to complete their field service tasks.

Field service players are generally sorted into one or more of the following profiles.

Administrator
A Salesforce admin integrates Field Service Lightning features and sets up user permissions as needed for your org.

Agent
Agents handle inbound cases, create work orders, and book appointments from the Salesforce console.

Dispatcher
Dispatchers build and manage appointments, assign technicians, and optimize scheduling based on technician skills, routing, and job priority.

Resource
Field resources or technicians receive work orders and appointments from dispatchers or agents. They also update job progress from mobile devices with the Salesforce app or the Field Service Lightning Mobile app.

1. From Setup, enter `Manage Users` in the Quick Find box, then select **Manage Users** > **Users**.

2. Click a field service user's name.

3. Click **Permission Set Assignments** at the top of the page or scroll down to the Permission Set Assignments related list.

4. Click **Edit Assignments**.

5. Enable the appropriate permission sets and click **Save**.

Tasks	Required Standard Profile	Permission Sets
Administrator: Manage all Field Service Lightning objects, including the Field Service Admin app, Field Service Lightning Visualforce pages, and logic services.	System Administrator	• FSL Admin License • FSL Admin Permissions
Agent: Access all global actions and their related objects to create, book, and schedule service appointments.	Standard User or System Administrator	• FSL Agent License • FSL Agent Permissions

Tasks	Required Standard Profile	Permission Sets
Dispatcher: Access all global actions and their related objects to create, book, and schedule service appointments.	Standard User or System Administrator	• FSL Dispatcher License • FSL Dispatcher Permissions
Manage service appointments and their related parent objects.	Standard User or System Administrator	• FSL Mobile License • FSL Resource License • FSL Resource Permissions

6. Click **Permission Set License Assignments** at the top of the page or scroll down to the Permission Set License Assignments related list.

7. Click **Edit Assignments**.

8. Enable the appropriate permission set licenses and click **Save**.

Permission Set License	Description
Field Service Standard	Enable this permission set license for all field service users.
Field Service Scheduling	Enable this permission set license for all mobile resources.
Field Service Dispatcher	Enable this permission set license for all dispatcher console users.
Field Service Mobile	Enable this permission set license for all mobile resources.

Assign Page Layouts from the Field Service Lightning Managed Package

Update page layouts of field service objects for profiles used for field service lightning.

> 🛑 **Important:** If you created field service profiles, perform the following steps on those profiles instead of the standard profiles.

1. From Setup, enter `Profiles` in the Quick Find box, then click **Profiles**.

2. Click **System Administrator**.

3. In the Page Layouts section, find the Operating Hours object and click **View Assignment**.

4. Change all the page layouts by selecting all the profiles and selecting **FSL Operating Hours Layout**.

5. Click **Save**.

6. Repeat the steps for the following objects.

   - Service Appointment (select FSL Service Appointment Layout)
   - Service Resource (select FSL Service Resource Layout)
   - Work Order (select FSL Work Order Layout)
   - Work Order Line Item (select FSL Work Order Layout)
   - Work Type (select FSL Work Type Layout)

7. Click **Save** and repeat for the Standard User profile.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable Field Service Lightning managed package:
- Customize Application

To assign a permission set license:
- Manage Users

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

Manage Geocodes and Data Integration Rules for the Field Service Lightning Managed Package

Ensure your data integration rules are set up so that the closet qualified resource can deliver field service.

When you enable Field Service Lightning, data integration rules are added to your org to update your field service objects with geolocation information. The geolocation information is used to calculate service resource travel times.

1. From Setup, enter `Data Integration Rules` in the Quick Find box, then select **Data Integration Rules**.

2. Click **Geocodes for Resource Absence Address**.

3. Click **Edit Rule Settings**.

4. Ensure **Bypass triggers** is deselected.

5. Click **Save**.

6. Repeat these steps for the following Field Service Lightning objects:

   - Geocodes for Service Appointment Address

   - Geocodes for Service Territory Address

   - Geocodes for Service Territory Member Address

   - Geocodes for the Address field of Address

   - Geocodes for Work Order Address

   - Geocodes for Work Order Line Item Address

Field Service Lightning Managed Package Customization

Learn the concepts behind the features in the Field Service Settings tab and how to adjust them to your needs.

Service Appointment Lifecycle in the Field Service Lightning Managed Package

A service appointment lifecycle is the sequence of stages that a service passes through. The lifecycle covers the time when the service appointment is created until it is completed. You can configure each status to meet your business needs.

Global Actions in the Field Service Lightning Managed Package

Use derivations to map the fields on Field Service objects to fields required for scheduling service appointments.

Scheduling Policies in the Field Service Lightning Managed Package

A scheduling policy is a set of rules used in a scheduling operation. You can set the scheduling logic for Field Service Lightning, including work priorities, travel speed, and geocoding, and add company scheduling policies and time zone details to the dispatcher interface.

Schedule Optimization with the Field Service Lightning Managed Package

The scheduling optimizer helps your field service team comply with SLAs, minimizes travel time, overtime, costs, and no-shows. It maximizes efficiency by assigning resources to as many service appointments per shift as possible. You can configure the optimizer to run repeatedly, for example, every day, or you can run it manually.

Manage how field service technicians receive jobs, either one at a time, hourly, daily, weekly, or monthly.

You can limit access to field service objects so that your service team members only see information relevant to them. Field Service Lightning includes out-of-the-box sharing tools to give team members access to the right information. For these tools to function, you need to change objects' default Public Read/Write sharing settings.

Service Appointment Lifecycle in the Field Service Lightning Managed Package

A service appointment lifecycle is the sequence of stages that a service passes through. The lifecycle covers the time when the service appointment is created until it is completed. You can configure each status to meet your business needs.

Field Service Lightning includes these statuses to indicate an appointment's state in a cycle.

- None
- Scheduled
- Dispatched
- In Progress
- Completed
- Cannot Complete
- Canceled

> **EDITIONS**
>
> Available in: Salesforce Classic and Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Field Service Lightning offers a predefined list of service appointment statuses. This status reflects the state of the appointment in the system and follows its whole lifecycle – from creation to completion.

A service appointment lifecycle is the sequence of stages or statuses that a service passes through. The lifecycle covers the time when the service appointment enters the system until the time it reaches its final status. Field Service Lightning offers a predefined status transition of service appointment statuses.

To configure status settings:

1. Open the Field Service Admin app from the Field Service app menu.

2. On the Field Service Settings tab, click **Service Appointment Lifecycle**.

3. Click **SA Status**.

Each row represents a flow or transition in the lifecycle. To modify a flow, click a status or select a new status. The values are based on the Service Status picklist. Click the tool icon to:

- Limit transitions to specific profiles or leave it blank to remove any restriction
- Select a custom Visualforce page for a status transition when using the Chatter action for Change Status.

To create a flow, click **Add Flow**. To disable a flow, click the trash can at the far right of the transition road.

The status flow diagram shows your status flows, but it doesn't show your profile-based restrictions.

When a service appointment is unscheduled, either manually or automatically, its status changes to None.

- **When scheduling a service appointment, change its status to Scheduled**—When a service appointment is assigned to a resource, either manually or automatically, its status changes to Scheduled.

- **Unschedule the service appointment when its status is changed to Canceled or New**—When a service appointment's status is changed to Canceled or New, the service is unscheduled and removed from the Gantt chart.

Important: If you change the service appointment lifecycle, sharing rules for the Service object also change.

- When a service appointment is created and assigned, it's visible only to the creator of the record (for example, a dispatcher, customer, or resource) and the relevant dispatchers based on user-territory sharing.
- When a service appointment's status is changed to Dispatched, the record is automatically shared with the user of the assigned resource.
- Canceled service appointments remove all sharing rules from the service. A Canceled service appointment is visible only to the owner of the service appointment and the relevant dispatchers based on the user-territory object.

Tip:

- Activate or deactivate transitions based on your business needs.
- Change the status names to fit your business needs. Changing the name doesn't change a status's automatic transition behavior.

Global Actions in the Field Service Lightning Managed Package

Use derivations to map the fields on Field Service objects to fields required for scheduling service appointments.

The Book Appointment global action uses these mappings to get the correct information in the service appointment.

- Service Territory (where)
- Start and End Times (when)
- Scheduling Policy (how)
- Work Type (what)

You can also configure appointment and emergency booking behavior, such as policies and grading thresholds.

Scheduling Policies in the Field Service Lightning Managed Package

A scheduling policy is a set of rules used in a scheduling operation. You can set the scheduling logic for Field Service Lightning, including work priorities, travel speed, and geocoding, and add company scheduling policies and time zone details to the dispatcher interface.

Field Service Lightning includes the following scheduling policies.

- **Customer First**—Balances great customer service with travel minimization. Appointments are graded first by the customer's selection of a preferred employee and then by the ability to provide the service appointment as soon as possible. Travel minimization is the second priority.
- **High Intensity**—Typically used in times of high service volumes, like a storm scenario, where the business is focusing on employee productivity first and customer preferences as the second priority.

- **Soft Boundaries**—Identical to the Customer First policy but allows sharing employees between different territories to enhance service coverage.
- **Emergency**—Used with the Emergency Chatter action to dispatch emergency service appointments.

You can change the weights of the predefined scheduling policies. You can also copy a predefined scheduling policy and adjust the rules, objectives, and objective weights to match the needs of your company.

To add a service objective to a scheduling policy:

1. Navigate to the scheduling policy that you want to add the resource objective to.

2. In the Scheduling Policy Objectives related list, click **New Scheduling Policy Objective**.

3. For **Service Goal**, select an objective.

4. Enter the weight that the objective should use in the policy.

5. Click **Save**.

To add a work rule to a scheduling policy:

1. Navigate to the scheduling policy that you want to add the rule to.

2. Click **New Scheduling Policy Work Rule**.

3. Use the lookup to select the work rule you created.

4. Click **Save**.

> **Note:** A scheduling policy must include a resource availability rule. The Field Service Lightning managed package automatically adds one resource availability rule to each policy.

> **Tip:** After you define or modify scheduling logic, test the results of various scheduling scenarios by using the Get Candidates action in the dispatcher console.

Street Level Routing for Accurate Travel Times
Street level routing improves travel calculation drastically as real turn-by-turn information is being considered.

Street Level Routing for Accurate Travel Times

Street level routing improves travel calculation drastically as real turn-by-turn information is being considered.

One of the most important KPI's that field service organizations track and try to improve is travel time per job. A small improvement can add a lot of time for the technician to perform additional work, drive less, save on gas, lower carbon footprint and reach the customer on time! Accurate route planning greatly contributes to the ability of your field force to perform at the highest level.

Routing allows you to calculate the following:

- Travel time – meaning how long it will take the worker to arrive at a location.
- Travel distance – from one location to another.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field Service Lightning uses the routing service to help minimize the worker travel time and distance from one work order to another. And to calculate travel time and distance and make it visible for the user.

While Aerial routing computes the shortest distance between two locations based on a straight line route, SLR computes the distance along roads or transportation routes. This is the most accurate distance as it is based on information and measurements of actual road speeds and the expected travel speed based on road type. It provides an accurate calculation, thus enabling a better optimization of schedule.

To Enable SLR simply go to the Field Service Settings app>Scheduling>Routing and tick the Enable Street Level Routing box - that's it! From now on FSL will use SLR for travel calculation. SLR calculation takes a bit longer than Aerial routing calculation.

Street Level Routing Considerations

- Resource travel speed isn't taken into account when SLR mode is activated.
- The travel time is based on the Driving profile in Google maps and can't be changed.
- SLR creates a grid of 200m squares. Every service appointment within the grid gets the same geolocation for routing purposes.

- Service appointments with more than a 100-kilometer distance uses aerial routing instead.

- Complex work and multiday work scheduling doesn't support SLR and use aerial routing instead.

- When you drag and drop a service appointment the routing calculates depending on the chosen start time. Street level routing might not be used and the calculation won't update immediately.

- Any scheduling action that is triggered in a transaction with data manipulation language uses aerial routing instead and it might not update immediately. For example, when creating a new service appointment via the API data manipulation language is used and the transaction is sent to a queue, which slows the response time.

- Before using SLR, run three to four global optimization runs for each region.

Schedule Optimization with the Field Service Lightning Managed Package

The scheduling optimizer helps your field service team comply with SLAs, minimizes travel time, overtime, costs, and no-shows. It maximizes efficiency by assigning resources to as many service appointments per shift as possible. You can configure the optimizer to run repeatedly, for example, every day, or you can run it manually.

> 👁 **Example:** For example, before running the service scheduling optimizer you may have:
>
> - 62 scheduled hours
> - 24 minutes average travel
> - 51 scheduled jobs
>
> After you run the service scheduling optimizer you have:
>
> - 69.5 scheduled hours
> - 15 minutes average travel
> - 56 scheduled jobs

Activate the Field Service Lightning Optimizer

Activate the service scheduling optimizer to set up the most efficient schedule possible for your business.

Create a Field Service Lightning Optimization User

To activate the scheduling optimizer, you create an optimization profile and optimization user. You then log in as the optimization user to complete activation.

Fix Scheduling Overlaps

Reschedule appointments that overlap another appointment or an absence with the click of a button.

Fill-In Schedule Gaps for Service Resources

Fill-in schedule creates a list of appointments for a technician and finds the optimal schedule.

Group Nearby Appointments

Group nearby appointments that are close to a given appointment.

Reshuffle Appointments to Schedule High Priority Work Over Lower Priority Jobs

When your schedule has no room for that high priority job, Appointments Reshuffle moves lower priority jobs to a later date or unschedules them. This frees up your technician for the more important job.

Activate the Field Service Lightning Optimizer

Activate the service scheduling optimizer to set up the most efficient schedule possible for your business.

1. As a system administrator with the "Modify All Data" user permission, navigate to the Field Service Settings tab.

2. Click **Create Optimization Profile** in the left-hand navigation bar.

   📝 Note: This process consumes one Salesforce license. Before you enable optimization, ensure that a license is available.

3. When you're prompted, switch to the newly created optimization user to set up your optimization:

   a. From Setup, click **Users** and locate the optimization user.

   b. Click **Edit** next to the user and select **Active** on their profile.

   c. Select **Generate new password and notify user immediately**.

   d. Log out.

4. When you receive a password reset email, click the link and complete the steps to log in to your org as the optimization user.

5. When you're logged in, click the + icon to see your full list of tabs.

6. Click the Field Service Settings tab.

7. Click **Activate Optimization**.

8. Click **Allow** to allow remote site access and be redirected back to the settings tab.

Optimization is now active in your org, as seen by the **Optimization Active** message in the left-hand navigation bar on the Field Service Settings page. You can log out as the optimization user and log back in with your regular username and password.

To have the optimizer run on repeat, open the **Field Service Admin** app from the Field Service app menu. Click the Field Service Settings tab, then click **Scheduled Jobs**. Select the job and adjust the settings as needed. When the optimizer is active, a status bar appears on the left-hand side of the Field Service Settings page.

To manually run the optimizer — for instance, for a particular geographical area using a certain scheduling policy — click **Optimize** in the Service drop-down menu on the Gantt chart and define your settings.

📝 Note:
   • A message displays at the top of the Gantt when the optimizer is running.
   • If you deactivate the optimization user, the optimization will fail.

Create a Field Service Lightning Optimization User

To activate the scheduling optimizer, you create an optimization profile and optimization user. You
then log in as the optimization user to complete activation.

Create an FSL optimization profile, create an optimization user, and then log in as the user and
activate the optimization.

Create a Field Service Lightning Optimization Profile

After activating the optimizer, create an optimization profile.

Create an Optimization User

After creating an optimization profile, create an optimization user.

Log In as the Optimization User and Activate Optimization

Once creating an optimization profile and a user, log in to active optimization.

Create a Field Service Lightning Optimization Profile

After activating the optimizer, create an optimization profile.

1. Select a standard platform user profile from **Setup** > **Manage Users** > **Profiles**, and then click
   Clone.
2. Set the profile name to `FSL Optimization`. You must use this name.
3. Set the following settings.
   - Custom App settings—Remove all settings, except **Field Service**.
   - Tab settings—Hide all tabs, except **Field Service Settings** – Default On.
   - Administrative permissions
     - Enable **API Enabled**.
     - Enable **Chatter Internal User**.
     - Enable **View Help Link**.
     - Enable **Allow View Knowledge**.
     - Disable all remaining fields.
   - Standard Object permissions—Remove all permissions from all objects.
   - Custom Object permissions—Keep defaults (no permissions).
   - Field Service app—**Visible**.
   - Field Service Settings tab—**On** (the default).
   - Enabled Visualforce Page Access—**Vf066_settings**, and remove all other settings.

- Enabled Apex Class Access—Include **OAASRestService** and **AuthServices**, and remove all other settings.

4. Click **Save**.

Create an Optimization User

After creating an optimization profile, create an optimization user.

1. Select **Setup** > **Company Profile**, and then click **Company Information**.

2. Find your Salesforce Org ID, and copy the 15-character string to your clipboard.

3. Select Setup Manage UsersUser, and then click **New User**.

4. Set the following values.

   - First Name—Leave blank.
   - Last Name—Enter *FSL Optimization*.
   - Alias—Enter *optUsr*.
   - Email—Enter the email address where you can receive the activation email.
   - Username—This name must follow this format: FSL.*[org id]*+@*[domain.name]*. For example, if your org ID is "00D58000000PIve" and your domain name is "optimization.com," enter *fsl.00D58000000PIve@optimization.com*.
   - Nickname—Accept the default.
   - Role—Select **None Specified**.
   - User License—Select **Salesforce Platform**.
   - Profile—Enter *FSL Optimization*.
   - Select **Generate new password and notify user immediately**. Make sure this option is selected.

5. Click **Save**.

Log In as the Optimization User and Activate Optimization

Once creating an optimization profile and a user, log in to active optimization.

1. When you receive a password reset email, click the link and complete the steps to log in to your org as the optimization user.

2. When logged in, click the **+** icon to see a list of all your tabs.

3. Click the **Field Service Settings** tab.

4. Select **Optimization** > **Activation**.

5. Click **Activate Optimization**.

6. To allow remote site access and be redirected back to the Settings tab, click **Allow**.

After you complete these steps, the scheduling optimizer operates in your org. You can log out as the optimization user and log back in with your regular username and password.

📝 **Note:** If you deactivate the optimization user, scheduling optimization no longer operates.

Fix Scheduling Overlaps

Reschedule appointments that overlap another appointment or an absence with the click of a button.

Configure Fix Overlaps for dispatchers on the Field Service Settings tab.

From the Field Service Settings tab go to **Scheduling** > **Dynamic Gantt** > **Fix Overlaps**. There are four settings.

1. `Automatically fix overlaps when an appointment overlaps with another appointment or absence`: When enabled, Fix overlaps is triggered whenever an appointment overlaps with another appointment or an absence.

2. `When attempting to fix overlaps:`

   a. `Schedule to original resource only`: When selected, only the original assignee is considered when rescheduling the appointments.

   b. `Schedule to all resources`: When selected, the scheduling engine considers other resources as well.

3. `After unscheduling services reschedule them by:`

   a. Chronological Order

   b. Priority

4. `When unable to find a valid schedule for an appointment:`

   a. `Leave on Gantt and set in-jeopardy`: If the scheduling engine can't reschedule without breaking work rules, the appointment is left in its original time and an in-jeopardy flag is raised.

    b. `Unschedule the appointment(s)`: If the scheduling engine can't reschedule without breaking work rules, the appointment is unscheduled and removed from the Gantt chart.

    c. `Reshuffle other assignments`: If the scheduling engine can't reschedule without breaking work rules, the scheduling engine reshuffles the appointment. Reshuffling means moving around, or even unscheduling, lower priority appointments to make room for a higher priority appointment. More information.

Considerations for Fix Overlaps

- Fix overlaps respects the order of the original plan so the earliest appointment remains the earliest and the last remains last.

- If a service is pinned, fix overlaps can't move it. However, fix overlaps don't respect pinned statuses and can move appointments in one of the pinned statuses.

- Fix overlaps only reschedules for the given day. If fix overlaps is progressing to a reshuffle operation it may schedule to other days as well.

- Fix overlaps isn't supported for capacity based resources.

- Fix overlaps leaves the appointments in their original status.

- When a service appointments is scheduled by a fix overlaps operation, the `Schedule Mode` on the Service appointments is **Automatic**.

Fill-In Schedule Gaps for Service Resources

Fill-in schedule creates a list of appointments for a technician and finds the optimal schedule.

The first step of the Fill-in Schedule operation is to build a pool of available jobs for the scheduling engine to try to schedule ('candidates service appointments'). A consideration when building the pool is which Service Appointments should be selected as candidates and which should not. Some jobs shouldn't be considered as a candidate, per the service organization definitions (example: for break fix, it may require to book an appointment with the customer over the phone before sending a technician onsite). As the definitions could be related to the service appointment itself and/or the parent of the service appointment, the scheduling engine will evaluate a checkbox field on the parent record and another checkbox field on the service appointment level.

3 new fields were introduced through the managed package in this release all named 'Is Fill In Candidate', but are on different objects - Service Appointment, Work Order and Work Order Line Item. The default value for these field is TRUE, meaning that by default every service appointment is a candidate for Fill-In Schedule. If the service organization wants to control which appointment should be a candidate and which should not they can do one of the following

- Automation: using Process Builder or Apex Triggers, set the value of the field(s) to False if the record fails to meet the needed criteria.

- Formula Fields: create a new checkbox formula field(s) that evaluate if that record should be a candidate, and change the settings that controls which fields the scheduling engine evaluates when building the pool of candidates, to use your custom formula field(s) instead of the default 'Is Fill In Candidates' fields (see below)

Settings: (Field Service Settings tab>Scheduling>Dynamic Gantt>Fill-in Schedule)

1. Service Appointment Candidate Boolean field Select a checkbox field that indicates if a service appointment is a candidate for fill-in schedule. You can select any standard or custom checkbox field from the service appointment object, including formula fields.

2. Work Order Candidate Boolean field In the case of Work Order as an appointment's parent - this field should be true for the service appointment to be a candidate. You can select any standard or custom checkbox field from the work order object, including formula fields.

3. Work Order Line Item Candidate Boolean field In the case of Work Order Line Item as an appointment's parent - this field should be true for the service appointment to be a candidate. You can select any standard or custom checkbox field from the work order line item object, including formula fields.

4. Order candidate appointments by (picklist) Select either Priority or Distance.

    a. Priority - the scheduling engine will first sort the candidates based on their priority field (as defined in the Scheduling>General Logic settings) starting from the highest priority. Distance will be also considered when sorting, but as a secondary consideration (meaning starting with the closest service appointment when 2 Work Orders have the same priority)

    b. Distance - The scheduling engine will first sort the candidates based on their proximity to the previous Appointment (or in case it is the first assignment of the day, their proximity to the technician home base). After a Service Appointments get scheduled, the scheduling engine will consider its location as the point for distance calculation. Priority will be also considered when sorting, but as a secondary consideration (meaning starting with the Work Order with higher priority, when 2 Service Appointments are in the same proximity)

5. Max appointments to schedule (number) When building the pool of candidates service appointments, the scheduling engine will stop looking for more candidates after finding this number of appointments (or after the max runtime settings, what ever is first). Max value to set is 50 candidates.

6. Max runtime (seconds) (number) When building the pool of candidates service appointments, the scheduling engine will stop looking for more candidates after this number of seconds (or after the max appointments to schedule settings, what ever is first). Max value to set is 60 seconds.

Considerations for Fill-In Schedule

- Fill-in schedule will only try to schedule for the given day (first day shown on the Gantt).

- The Is Fill In Candidate fields on the service appointment, work order and work order line items default value is True. This means any new service appointment will be considered as a fill in candidate, while service appointment records that existed prior to the upgrade will not be considered as candidates. The admin can use Process Builder to control these fields to fit your organization fill in schedule needs, or even create new formula fields that will evaluate in real time whether the record should be a candidate or not.

- Service Appointments without geolocation will be sorted last if sorting by distance.

- Candidate Service Appointments are only ones that are unscheduled or scheduled for the future (day after and onward).

- When a Service Appointments was scheduled by Fill-in Schedule operation, the 'value for the Schedule Mode' field on the Service appointments will be 'Automatic'.

Group Nearby Appointments

Group nearby appointments that are close to a given appointment.

Group nearby appointments unschedules the appointments that are scheduled later that day and, after building a pool of near by service appointments, it schedules appointments close to the source appointment.

📝 **Note:** Lower priority work may be unassigned to make room for the nearby appointments.

Settings: (Field Service Settings tab>Scheduling>Dynamic Gantt>Group Nearby Appointments)

1. Service Appointment candidate Boolean field Select a checkbox field that indicates if a service appointment is a candidate for group nearby appointment. You can select any standard or custom checkbox field from the service appointment object, including formula fields.

2. Work Order Candidate Boolean field In the case of Work Order as an appointment's parent - this field should be true for the service appointment to be a candidate. You can select any standard or custom checkbox field from the work order object, including formula fields.

3. Work Order Line Item Candidate Boolean field In the case of Work Order Line Item as an appointment's parent - this field should be true for the service appointment to be a candidate. You can select any standard or custom checkbox field from the work order object, including formula fields.

4. Max appointments to schedule (number) When building the pool of candidates service appointments, the scheduling engine will stop looking for more candidates after finding this number of appointments (or after the max runtime settings, what ever is first). Max value to set is 50 candidates.

5. Max runtime (seconds) (number) When building the pool of candidates service appointments, the scheduling engine will stop looking for more candidates after this number of seconds (or after the max appointments to schedule settings, what ever is first). Max value to set is 60 seconds.

6. When attempting to schedule the unscheduled service after the nearby services (picklist) The first thing the Group Nearby appointment operation is doing, is unscheduling the services that were planned for the resource for the remainder of the day, to make room for appointments in proximity to the appointment that triggered the operation. The operation continues with building a pool of surrounding appointments and scheduling these to the resource. The last step is to try and schedule the appointments that were unscheduled in the first step of the operation. When attempting to schedule the unscheduled service after the nearby services (picklist) the scheduling engine will.. There are 2 options on the picker:

   a. Schedule to original resource only - when selected, only the original assignee will be considered as a candidate when the scheduling engine will try to reschedule the appointments

   b. Schedule to all resources - When selected, the scheduling engine will consider other resources as well

7. When unable to arrange schedule (picklist) There are 3 options in the picker:

   a. Leave on Gantt and set in-jeopardy - If the scheduling engine couldn't reschedule without breaking work rules, the appointment will be left in it's original time, and an in-jeopardy flag will be raised.

   b. Unschedule the appointment(s) - If the scheduling engine couldn't reschedule without breaking work rules, the appointment will be unscheduled. I.e removed from the Gantt.

   c. Reshuffle other assignments - if the scheduling engine couldn't reschedule without breaking work rules, the scheduling engine will then try to reshuffle the appointment (Reshuffle means moving around (or even unscheduling) lower priority appointments to make room for a higher priority appointment to be scheduled. More information on Reshuffle process in section 'Appointments Reshuffle')

8. Radius for nearby appointments (number) The radius around the originating service appointments where other appointments are considered to be candidates for the Group Nearby Appointments operation. The distance unit can either be Km or Mile, depending on the 'default driving speed unit' defined under the Routing settings (Field Service Settings tab>Scheduling>Routing)

Considerations for Group Nearby Appointments

- Group Nearby Appointments will only try to schedule for the given day (first day shown on the Gantt).

- The Is Fill In Candidate fields on the service appointment, work order and work order line items default value is True. This means any new service appointment will be considered as a fill in candidate, while service appointment records that existed prior to the upgrade will not be considered as candidates. The admin can use Process Builder to control these fields to fit your organization fill in schedule needs, or even create new formula fields that will evaluate in real time whether the record should be a candidate or not.

- Only unscheduled Service Appointments can be candidates for Group Nearby Appointments.

- When a Service Appointments was scheduled by Group Nearby Appointments operation, the 'value for the Schedule Mode' field on the Service appointments will be 'Automatic'.

Reshuffle Appointments to Schedule High Priority Work Over Lower Priority Jobs

When your schedule has no room for that high priority job, Appointments Reshuffle moves lower
priority jobs to a later date or unschedules them. This frees up your technician for the more important
job.

Settings: (Field Service Settings tab>Scheduling>Dynamic Gantt>Reshuffle Assignments)

1. Max time horizon (days) in which the appointment can be scheduled The Reshuffle process
    will try to schedule the appointment in a date range which is the Earliest Start PErmitted (or
    the current time if it is later) up until X more days (where x is the value configured here). 7 is
    the maximum value.

Dispatch Policies in the Field Service Lightning Managed Package

Manage how field service technicians receive jobs, either one at a time, hourly, daily, weekly, or
monthly.

You can determine how far out appointments can or must be made. You can enable drip feed,
which dispatches service appointments to technicians as they finish current appointments.

Sharing for the Field Service Lightning Managed Package

You can limit access to field service objects so that your service team members only see information
relevant to them. Field Service Lightning includes out-of-the-box sharing tools to give team members
access to the right information. For these tools to function, you need to change objects' default
Public Read/Write sharing settings.

1. Select **Setup** > **Security Controls** > **Sharing Settings**.

2. Change the sharing settings for the for the Work Order, Service Appointment, Service Territory.
    and Service Resource objects to **Private**.

3. Click **Save**.

You can also give dispatchers access to the objects they need by sharing information across territories
and syncing calendars to include absences and other events.

To change sharing rules for the Appointment object, you must change the service appointment lifecycle. When a service is created and
assigned, the service is visible only to the record's creator and relevant dispatchers based on user-location sharing. When you change a
dispatching service's status to Dispatched, the record is shared with the user of the assigned resource.

> 📝 Note: When a service is canceled, all sharing rules are removed, and the service is visible only to the service owner and the relevant
> dispatchers based on the User-Location object.

Field Service Lightning Dispatcher Console

The Field Service Lightning Managed Package includes the Dispatcher Console, which is the main working space for dispatchers.

From the Field Service tab, the Dispatcher Console contains the appointments list, the resources Gantt chart, the map, and other features.

Search in the Dispatcher Console

Field Service Lightning offers search options for both the Service list and the Resource list.

Dispatcher Console Service Appointment List

The Service Appointment list is located on the left side of the dispatcher console and contains a list of relevant appointments. Users can filter, sort, and search within the list. You can also perform actions on selected services in the list.

Dispatcher Console Gantt

The Gantt is located on the right side of the Dispatcher Console and contains the resource list, the schedule view, and additional features.

Dispatcher Console Map

The map displays the location of appointments from the service appointments List, the resource's home base, and the resource's last known position.

Scheduling Policy Picker

A scheduling policy is a set of rules and objectives that are used in a scheduling operation. The scheduling policy you select will be used in every scheduling action.

Managing Service Resources

Resources represent technicians that are assigned to complete a service appointment.

Search in the Dispatcher Console

Field Service Lightning offers search options for both the Service list and the Resource list.

Search the Dispatcher Console Service Appointment List

You can search for appointments from the service appointment list.

Search the Dispatcher Console Resource List

You can search for a resource from the service resource list.

Search the Dispatcher Console Service Appointment List

You can search for appointments from the service appointment list.

To search for an appointment in the service appointment list, enter at least two characters in the list search box.

The search process takes into account the following service appointment fields:

- Service Appointment Number
- Gantt Label
- Account Name
- Assigned Resource Name
- Service Appointment ID
- Service Appointment ID
- Service Territory Name
- SA Status
- Fields in the Service Appointments List Columns field set that are of the following types: text, text area, lookup name, and picklist

You can search using more than one keyword by separating each keyword with a comma (AND logic condition is applied on all search items).

After you enter two characters in the search box, the service list is filtered to list only service appointments that have at least one matched property with the entered value.

Search the Dispatcher Console Resource List

You can search for a resource from the service resource list.

To search for a resource on the service resource list, type at least one character into the search box.

The search process filters based on the resource name.

You can also use the Gantt Filter to filter resources by additional options, including their skill set or by any checkbox or picklist field included in the filter field set.

Dispatcher Console Service Appointment List

The Service Appointment list is located on the left side of the dispatcher console and contains a list of relevant appointments. Users can filter, sort, and search within the list. You can also perform actions on selected services in the list.

To change the order of the bulk action buttons in the service list, navigate to Dispatcher Settings and select Bulk actions order. Then, drag and drop the actions to fit your preference.

You can use field sets to control:

- Which fields appear in the service list
- Which fields appear when viewing a single service within the service list

You can also drag fields in the list to adjust their width and reveal additional fields.

Dispatcher Console Scheduling Horizon

The Scheduling Horizon takes into account the selected date properties, and shows the relevant appointments up to and including the horizon date.

For example:

- **Number of services to show**: 500 (amount configurable)
- **Selected date property**: Due Date
- **Scheduling horizon**: 05/30/2015

If you select **Match Gantt Dates**, this changes the scheduling horizon to match the dates the Gantt shows.

Dispatcher Console Service Appointment List Filters

Use filters to narrow the list of appointments displayed in the service appointment list.

Some predefined filters are available:

- All Services
- Todo
- Recently used
- Flagged
- Selected
- Unscheduled
- In Jeopardy
- Rules violating
- Gantt
- Canceled
- Contractors

Most filters are self-explanatory (All, Scheduled, Unscheduled, etc.).

The Todo filter shows services that are waiting for the dispatcher's next action. For example: unscheduled services, services with a rule violation, services in jeopardy, etc.

The Gantt filter shows the same services seen on the Gantt.

You can also create Custom filters:

Dispatcher Console Service List Search

Use keywords to filter service appointments.

Use the Appointment List Search to filter appointments displayed on the list by keywords. You can search for many keywords by separating each word with a comma (applying the AND logic condition).

Dispatcher Console Service List Customization

You can customize service lists.

There are two components you can customize for the service list:

- **Appointment list columns**: Use the *appointment list columns* Field Set to configure which fields you want to appear at the service appointment list header. You can select up to 6 fields.
- **Appointment mini view**: When you click an appointment in the list, the row extends to expose the mini view. Use the *Appointment Expanded* Field Set to configure up to 12 fields you want to appear in the mini view.

The appointment list and mini view are responsive, so expanding and reducing the width of the sidebar component will expose or hide fields to match the screen real estate available.

Dispatcher Console Appointment List Bulk Actions

You can perform mass actions on an appointment list.

You can perform different mass actions on appointments in the list by opening the Actions menu and choosing an action. Available actions are:

- **Schedule**: Execute an automatic scheduling process for the selected appointments.
- **Change Status**: Change the status for the selected appointments.
- **Flag** / **Unflag**: Add or remove a flag for the selected appointments. You can use the flag for filtering later.
- **Unschedule**: Unschedule the selected appointments, or define the relevant time range and service territories of the appointments that should be unscheduled.
- **Optimize**: Turn on scheduling optimization.

The list of actions is customizable; you can remove some actions and edit the order based on your preference. Check out the Field Service Setting tab in the Field Service Admin app for more details.

Dispatcher Console Gantt

The Gantt is located on the right side of the Dispatcher Console and contains the resource list, the schedule view, and additional features.

- The resource list displays all active resources whose locations are selected in *territory Filtering*.
- The *Resource Filter* lets you control which resources appear in the Gantt.

  You can customize which fields are available in the filter by editing the Resource Gantt Filter field set. Only picklists and checkbox fields can be added. Select **Show working resources only** in the filter box to show only resources who are scheduled to perform services in the calendar interval shown on the Gantt.
- The *Gantt Filter* lets you filter resources by skill, properties, and the hours/days displayed on the Gantt.
- The *notifications area* shows you details about scheduling actions that you took such as Schedule, Unschedule, etc.
- The *Lock Gantt* button lets you switch between a read-only and read/write view of the Gantt.
- The KPI Monitor gives you your schedule highlights, including the total work load, average travel time, number of completed services, number of rules violating services, and number of services which are In Jeopardy.
- The *Date view and Resolution* controls the date range that is displayed on the Gantt, and offers several options:
  - Jump to a specific date
  - Scroll one day to the left/right
  - Jump to Today
  - Gantt resolution: The number of days to display on the Gantt
- The *Territory's time zone* displays each territory's current date and time.

The Options button lets you customize the Gantt data and gives you access to viewing and other dispatcher console settings.

You can filter appointments by service territories.

Customize your Gantt chart to display details you want to see.

> ### EDITIONS
>
> Available in: Salesforce Classic and Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Dispatcher Console Option Button

The Options button lets you customize the Gantt data and gives you access to viewing and other dispatcher console settings.

The Options button is located above the service appointment List and includes several settings:

- **Territory filtering**: Filter the locations seen on the Gantt.
- **Gantt Settings**: Configure the Gantt data set, behavior, and layout.
- **Open full screen**: Open the Dispatcher Console in full screen with four available tabs: Accounts, Services, Resources, and Absences.

> ### EDITIONS
>
> Available in: Salesforce Classic and Lightning Experience
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Dispatcher Console Territory Filtering

You can filter appointments by service territories.

You can filter the locations displayed on the Gantt by clicking the Settings icon and then Service Territory filtering.

The selected service territories will be loaded with the relevant resources and service appointments.

✏️ Note: Service territories that don't have resources assigned as territory members are shown on the appointment list but not on the Gantt chart.

- You can choose whether to **Show Service Appointments that aren't associated with a territory**. You will be able to schedule them to any of the loaded Service Territories.

- **Search Territories**: Use the search bar to filter out Service Territories.

- **All / None**: Use these buttons to quickly select all Service Territories or remove all selections.

Dispatcher Console Gantt Chart Settings

Customize your Gantt chart to display details you want to see.

To configure your Gantt chart settings, clicking the Settings icon, and then click **Dispatch console settings**.

- **Filter candidates after get slots action**: Show only resources that come up as candidates when using the Get Candidates service list or Gantt action.

  - When enabled, only the available resources for scheduling will be seen on the Gantt.

  - When disabled, all the resources will be seen on the Gantt without any filtering.

- **Scheduling horizon limit**: Set the number of days to show before the selected scheduling horizon.

- **Services per page**: Set the maximum number of services per page in the Service list. The available options are 50, 75, 100, 125, and 150.

- **Resource row height**: Set the height of the resources row in the Gantt. The available options are XSmall, Small, Medium, and Large.

The Gantt Filter

Filter resources by skills and other features, and set hours and days to display on the Gantt chart.

KPI Monitor

The KPI (Key Performance Indicator) monitor provides important insight on your services.

The Gantt Filter

Filter resources by skills and other features, and set hours and days to display on the Gantt chart.

The Gantt Filter in the top left lets you filter resources by their skills and other features. You can also set the available hours and days to display on the Gantt chart.

- The **Hours** filter lets you select a range of hours that you would like to see across all dates resolution (daily, 2 days, 3 days and weekly). It also lets you select whether to display weekends on the Gantt.

- The **Resources** filter lets you specify which resources are shown. Selecting a field activates the filter. You can customize which fields are available in the filter by editing the Resource Gantt Filter field set. Only picklists and checkbox fields can be added. In addition, you can select **Show working resources only** in the filter box to show only resources who are scheduled to perform services in the calendar interval shown on the Gantt.

- The **Skills** filter ensures that only resources with the selected skills are visible on the Gantt.

- The **Monthly** filter lets you select how a resource's monthly capacity is calculated. Deselect any fields that you don't want to be included in the calculation.

By default the Gantt is being sorted by the resource name, ascending. You can add any field to the "Resource Gantt Filter" Field set on the Service Resources object, and it shows as an option on the Gant Filter settings under the Resources tab.

1. To add a new field to the selection, go to **Field Service** > **Service Resource** > **Field Sets**.

2. Edit the Field Set layout Fields.

3. Change to sort by the desired field.

> ✏️ Note: Lookup fields are not supported. All other field type are supported.

KPI Monitor

The KPI (Key Performance Indicator) monitor provides important insight on your services.

The KPI Monitor can be found on the top right side of the Gantt.

The available indicators are:

- Total scheduled time (workload) of all loaded service territories.
- Average travel time per service of all service shown on the Gantt.
- Number of completed services out of all services shown on the Gantt.
- Total number of rules violating services.
- Total number of services in jeopardy.

Dispatcher Console Map

The map displays the location of appointments from the service appointments List, the resource's home base, and the resource's last known position.

You can also add any location-based object to the map.

- **Schedule services**: Click the service icon and click Schedule to auto-assign the service to an available resource.

- **Display Google traffic data**: Select the Traffic checkbox at the base of the map.

- **View a resource's daily route at street level**: Open the Resource section in the Gantt and click the right-hand tab.

- **View all location-based standard or custom objects as separate map layers**: Set up a tabular report for any object with latitude and longitude values. Click **Map Layers** in the top left corner of the map to view reports and resources.

  - In the Reports tab, you can select layers to add to the map. Only reports in the Field Service Reports folder appear in the Reports tab. The markers' icons on the map are visible according to the first column in the report. Up to 10 additional columns are visible inside the marker's info window.

  - The map shows all resources by default. Type a name in the Resources tab and click **Show on map** to view a single resource's markers.

Dispatcher Console Map Views

The Map view shows you all resources' home bases, assigned service appointments, and last known positions. You can view one or more items by selecting the checkboxes below the map.

View Resource Availability by Month

The monthly view in the dispatcher console lets you review and plan out your monthly capacity. Gain insight into your workforce's work time, travel, and absences.

Dispatcher Console Map Views

The Map view shows you all resources' home bases, assigned service appointments, and last known positions. You can view one or more items by selecting the checkboxes below the map.

Select a resource name in the drop-down list to filter the Map to display only:

- **Service Appointment**: All assigned appointments to the selected resource and which appear in the Service list.

- **Home base**: Resources' home base, according to the home base coordinates specified in the resource details.

- **Live positions**: When resources update service appointment status from their mobile device, their coordinates are automatically recorded. Live Position shows the latest coordinates saved in the system.

View Resource Availability by Month

The monthly view in the dispatcher console lets you review and plan out your monthly capacity. Gain insight into your workforce's work time, travel, and absences.

To see the monthly view, use the drop-down view selector in the Gantt.

The Gantt filter lets you select how a resource's monthly capacity is calculated. Deselect any fields that you don't want to be included in the calculation.

You can also customize the capacity-based color coding in the Field Service Settings > Scheduling > Dispatcher Console UI > Monthly View Settings. Enter the number of hours that indicate High Utilization (default: 150), Medium Utilization (default: 100), and Extensive Travel (default: 33). On the monthly view:

- Resources whose schedules are below Medium Utilization appear in green.
- Resources whose schedules are between High and Medium Utilization appear in yellow.
- Resources whose schedules are above High Utilization appear in red.
- Resources whose percentage of travel is larger than the value you specify are considered Extensive Travel candidates, and appear with an automobile icon.

On the monthly resource view, you can:

- Click an event name to view its details.
- Flag services.
- Click the date on the vertical axis to switch to the date's daily view.

Scheduling Policy Picker

A scheduling policy is a set of rules and objectives that are used in a scheduling operation. The scheduling policy you select will be used in every scheduling action.

From the **Policy** dropdown, select a scheduling policy.

Appointment Booking

Field Service Lightning lets you book service appointments for different Salesforce objects, including Work Orders, Work Order Line Items, Accounts, Assets, and Opportunities. To book an appointment, follow the steps below (for convenience, we'll use a Work Order)

Rescheduling an Appointment

You can reschedule appointments from their service appointment pages.

Set Visiting Hours

Create "visiting hours" for your customers to ensure that services are scheduled during a business's operating hours.

Scheduling Service Appointments

There are multiple options for scheduling service appointments.

Unscheduling Service Appointments

In Field Service Lightning there are different ways to schedule service appointments.

Appointment Booking

Field Service Lightning lets you book service appointments for different Salesforce objects, including Work Orders, Work Order Line Items, Accounts, Assets, and Opportunities. To book an appointment, follow the steps below (for convenience, we'll use a Work Order)

To book an appointment, follow the steps below (for convenience, we'll use a Work Order):

1. Open a work order.

2. In the Chatter feed, select **Book Appointment**. If this action isn't available, you can add it to the layout.

3. Service Appointments can be booked for parent records, like a work order. These parent records can have many service appointments booked against to reflect different trips. The Book Appointment action gives you the opportunity to create a new appointment or reschedule an existing one.

4. Let's create a new appointment. Select a Work Type from the drop-down list. Work Types provide key inputs to the scheduling optimizer, including an estimated duration, plus skill requirements for the resource. The address is automatically populated using the Work Order's address (this is configurable through the Global Actions).

5. Select the Service Territory from the drop-down list, again to provide this input for scheduling purposes. Click **Show more options** if you want to change the Early Start and Due Date default range.

6. Click Get Appointments to view a graded list of available slots for this service. The list considers all scheduling constraints such as the current schedule, work rules, and service objective. Slots may be indicated with an 'Ideal' or 'recommended' icons. Clicking the information icon opens the Appointment Insights window, which shows how each slot ranks against the Company KPIs as defined in the Scheduling policy.

7. Click **Extend Dates** to show a wider range of service appointment dates.

8. Select an appointment window. A service appointment will be created and automatically allocated to a resource, taking into consideration all scheduling constraints.

9. To view the details, click View Service Appointment.

> 📝 **Note:** Booking from objects other than work orders or work order line items creates a work order and the service appointment is created for that work order. For instance, an agent opens the appointment booking action from the Asset page and select a time slot. In doing this, a work order and a service appointment are created.

Rescheduling an Appointment

You can reschedule appointments from their service appointment pages.

Once an appointment is booked, rescheduled from its service appointment detail page.

1. Open a parent record, liked a Work Order, that has a booked appointment.

2. In the Chatter feed, select the **Book Appointment** quick action. If this action is not available, you can add it to the layout.

3. Review and adjust inputs for the Work Type, Address, and Service Territory, if desired.

4. Click Get Appointments to view a list of available slots.

5. Select the suitable appointment window, and the service appointment is automatically rescheduled.

Set Visiting Hours

Create "visiting hours" for your customers to ensure that services are scheduled during a business's operating hours.

Respect the operating hours of your business customers by creating "visiting hours" for them. For example, if a customer only wants technicians to visit on weekdays between noon and 4 PM, you can use visiting hours to ensure that any services for that customer are scheduled within those hours. The service scheduling optimizer will only schedule appointments for customers within their visiting hours. Dispatchers can manually schedule appointments outside a customer's visiting hours, though they'll be alerted that they're doing so.

To set visiting hours:

1. Confirm that your profile has access to the "Field Service - Service Visiting Hours" work rule record type. If you don't have access, click **Edit** next to Work Rules and add this record type to the "Selected Record Type" list.

2. Navigate to the Work Rules tab, and create a work rule by selecting "Field Service - Service Visiting Hours."

3. Click **Continue**.

4. Add a name, such as "Service Appointment Visiting Hours," and a description.

5. Click **Save**.

To add your new visiting hours work rule to a scheduling policy:

1. Navigate to the Scheduling Policies tab.

2. Select the scheduling policy you want to use.

3. Click **New Scheduling Policy Work Rule**.

4. Select the work rule.

5. Click **Save**.

📝 Note:

- You can attach one calendar per service.

- The calendar is effective until you remove or replace it on the service.

- Calendars use the timezone of the service they're attached to. The service inherits its service location's time zone. If the location has no time zone specified, GMT is used.

- The scheduling optimizer respects visiting hours.

- You can map a lookup field from a custom object to the Service Object 'Visiting Hours Calendar' field to auto-populate the Visiting Hours Calendar field.

Scheduling Service Appointments

There are multiple options for scheduling service appointments.

You can schedule service appointments in several ways:

- Manual drag and drop

- Click Schedule from the appointment mini view

- Click Schedule from the appointment list mass actions

- Use the Book Appointment quick action

- Use the Candidates Chatter quick action

- Use the Emergency Chatter quick action

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Scheduling a Service Appointment Manually

A dispatcher can manually schedule service appointments.

Scheduling an Appointment in the Mini View

You can schedule service appointments in the service list's mini view.

Schedule Multi-Day Service Appointments

You can schedule service appointments that span multiple days.

Scheduling an Appointment from the Mass Schedule Action

Mass actions let you schedule multiple service appointments automatically.

Scheduling an Emergency Service Appointment

A real-time map view helps you schedule and manage emergency service appointments.

Changing the Service Appointment Status Manually

You can change a service appointment's status manually.

Changing an Appointment Status from the Gantt Chart

You can use the Gantt chart to change a service appointment's status.

Changing an Appointment Status in Chatter

You can go to the Chatter feed to change a service appointment's status.

You can go to a service appointment detail page to change an appointment's status.

The Service Appointment status can be changed automatically or manually by the dispatcher or the field resource.

Field Service Lightning includes scheduling policies.

Rule violations occur when Field Service Lightning recognizes that an appointment schedule doesn't adhere to predefined scheduling rules. Examples of rule violations include travel time conflicts, and appointments that are not scheduled between their Earliest Start Permitted and Due Date.

Scheduling a Service Appointment Manually

A dispatcher can manually schedule service appointments.

The Dispatcher can schedule a service appointment by dragging it from the appointment list and dropping it on a selected resource space on the Gantt chart.

Using this method, you can drag the service appointment to any resource. If it causes rule violations (for example, the wrong skill set), it will be marked with a yellow triangle. Hovering over the service appointment space shows the appointment details and the list of rule violations, as shown below:

> 📝 **Note:** Rule violations can only occur when a service appointment is scheduled manually. Automatic scheduling never breaks a rule.

You can configure what should be the stopping points for your appointments when dragging & dropping. Simply change the value in the settings to the duration of your choice.

1. For Field Service Settings, click **Scheduling** > **Dispatcher Console UI** > **Drag Jumps**>> on Gantt.
2. Set the minute window to your preference.

Manual Scheduling Considerations

- When dropping the Appointment block on the Gantt, it will shift to the closest 'valid stop'. For example is the Drag Jump is set to 30 minutes and the appointment was dropped at 10:20 it will move to 10:30. Continuing with the same example, If it is dropped at 10:14 it will move to 10:00.

- Gantt Chart Appointment Minimum Drag Step settings in locking the appointment block for movement under a configurable amount of . It was meant to avoid human errors when the dispatcher moved the appointment block accidently. Customers who are using the Drag Jump feature usually don't need the Gantt Chart Appointment Minimum Drag Step feature, and are best to leave it configured to 1 minute.

Scheduling an Appointment in the Mini View

You can schedule service appointments in the service list's mini view.

Click a service appointment in the service list to expand a mini service view. On the bottom of the mini service view, you can find the Schedule action.

Click **Schedule** to let the system schedule the service appointment while taking into account the rules and objectives in the configured scheduling policy (located above the service appointment list).

You will be notified if there are no available candidates. You can manually bypass the rules and objectives for further scheduling.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Schedule Multi-Day Service Appointments

You can schedule service appointments that span multiple days.

Rome wasn't built in a day, and chances are that your grander projects also require more than a day's work. Happily, you can now schedule service appointments that span multiple days.

To use multi-day scheduling:

1. Navigate to Field Service Settings > Scheduling, then click **Logic**. Next to the *Multi-day service* field, select **Is Multiday**.

2. Add the `Multi-Day checkbox` to Service Appointment page layouts.

3. If a service appointment spans multiple days, select this checkbox on the service appointment.

   📝 Note: On multi-day service appointments, start and end times must be in valid time slots of the assigned resource's calendar.

The resource can't be assigned to any other appointment during the multi-day service appointment.

You can either schedule multi-day appointments manually or with optimization. Other scheduling actions are not supported.

Scheduling an Appointment from the Mass Schedule Action

Mass actions let you schedule multiple service appointments automatically.

By using the Schedule option from the Service Appointment List Mass Actions menu, you can automatically schedule multiple service appointments in order based on their priority.

To schedule service appointment(s):

1. In the Service Appointment list, select the appointment(s) you would like to schedule.

2. On the service list mass schedule menu, click Schedule.

   The progress bar appears at the bottom right corner.

3. When the scheduling process is completed, you can either close the message box or view the detailed schedule results by clicking **View Service Appointments**.

Scheduling an Emergency Service Appointment

A real-time map view helps you schedule and manage emergency service appointments.

Swiftly schedule, dispatch, and track emergency appointments in just a few clicks with the help of a real-time map view. Clicking the Emergency Chatter action on a service reveals a map view of your closest field resources so you can dispatch work immediately.

Emergency Chatter action

The Emergency Dispatch Settings include several ways to customize your approach to emergency services.

Setting Name	Description
Emergency Scheduling Policy	The default policy that will be used to find resources to assign to an emergency service. We recommend using an Easy policy with softer rules to ensure that more candidates are returned.
Last Known Location Validity	The number of minutes after which a data breadcrumb--such as resource location or geolocation--is no longer valid. For example, if the breadcrumb validity is 20 minutes and the location of resource X was last updated 30 minutes prior, the emergency dispatcher then calculates the resource's ETA based on the location of the last appointment they completed, or if they did not complete any appointments that day, their home base, which is either their Service Territory Member address, or if not applicable their Service Resource address.
Idea/Good Availability Grade	The grading of candidates (color-coded). In the breadcrumbs example: • Resources who can reach the service in less than 30 minutes are ideal candidates. • Resource who can reach the service between 30 and 60 minutes are good candidates. • Resources who can reach the service after 60 minutes are bad candidates.
Emergency Search Timeframe	The amount of time you have to resolve the emergency, not counting the service duration. The *Earliest Start* Permitted on the appointment is set to the current time, and the *Due Date* = current time + appointment duration + Emergency Search Timeframe.

Setting Name	Description
	For example, if an appointment will require one hour of work and you set the Emergency Search Timeframe to 360 minutes (6 hours), the emergency dispatcher shows you only resources who can travel to and complete the task in the next 7 hours.

Click a resource on the map to see:

- Their route to the emergency service and ETA.
- The data (breadcrumb) that their location is based on.
- A Dispatch button. Click **Dispatch** to assign the appointment to them and send them a customizable Chatter notification.

Resource locations are calculated based on their latest breadcrumbs. If they don't have valid breadcrumbs, their location is the location of the last appointment they completed, or if they did not complete any service appointments that day, their home base, which is either their Service Territory Member address, or if not applicable their Service Resource address.

The emergency dispatcher tool comes with a range of helpful features:

- If your current scheduling policy isn't returning any candidates, change the policy directly on the map to trigger another search (for instance, from Medium to Easy).
- If you want a candidate to complete their current service before heading to the emergency service, change the dispatcher setting from "as soon as possible" to "after current service" at the top of the map. Changing this setting updates the candidates' ETA.
- Click Candidates to view a list of all candidates in order of ETA. Hover over a resource name in the list to see options to dispatch them or view them on the map.
- Quickly spot emergency services in the Gantt by looking for the lightning icon:
- Click to display the traffic layer, if available.
- Click to zoom in on the emergency service location.

Changing the Service Appointment Status Manually

You can change a service appointment's status manually.

The Service Appointment status can be changed either automatically (that is, status becomes 'None' by the unscheduled Gantt action, status becomes Dispatched by the Auto dispatch background job etc.) or manually by the dispatcher or the field resource. This section explains manual status changes done by a dispatcher. Automatic status changes are described under Automatic Service Status Change.

You can manually change the Service Appointment status from several places:

- Service Appointment on the Gantt Chart – Right click, and change the status
- *Change status* Chatter quick action
- Service Appointment detail page or lightbox

EDITIONS

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Changing an Appointment Status from the Gantt Chart

You can use the Gantt chart to change a service appointment's status.

1. On the Gantt, select the appointment(s) whose status you want to change. You can select more than one service by holding CTRL / CMD while clicking on service appointments.

2. Right-click on the selection to display the Gantt actions.

Changing an Appointment Status in Chatter

You can go to the Chatter feed to change a service appointment's status.

1. Open a service appointment record whose status you want to change, either in a Salesforce record detail view or in a Gantt lightbox.

2. In the Chatter feed, select the 'Change Status' Chatter quick action.

3. Select the desired status. Only status values that obey the status flow configuration are shown. A notification appears that the status was updated successfully.

Changing an Appointment Status on Service Appointment Detail Page

You can go to a service appointment detail page to change an appointment's status.

1. Open the service appointment record whose status you want to change, either in a Salesforce record detail view or in a Gantt lightbox.

2. Double-click the **Status** field to select a new value.

   📝 Note: The dropdown list will show all statuses in the system, but the status change will work only according to the configured Service Appointment Lifecycle status transitions.

Automatic Appointment Status Change

The Service Appointment status can be changed automatically or manually by the dispatcher or the field resource.

Automatic status changes are triggered by the following:

- **Automatic Status change - Auto dispatch background job**: This job enables automatic dispatching of assigned appointments. It changes the status of the chosen appointments (according to the job configuration) from Scheduled to Dispatched.

- **Automatic Status change – System trigger:**

  Unschedule the Service Appointment when its status is changed to Canceled or New: When a service is Canceled or its status is changed to None, the service will be automatically unscheduled and removed from the Gantt.

The above trigger can be activated or deactivated, according to the business needs.

Scheduling Policies

Field Service Lightning includes scheduling policies.

A scheduling policy is a set of rules and objectives that are used in a scheduling operation. Typically, the scheduling policy is used when requesting an appointment and on various Gantt operations such as Schedule, Candidates etc.

The following scheduling policies are included in Field Service Lightning:

- **Customer First**: This policy balances objectives such as great customer service with travel minimization. Appointments are graded first by the customer's selection of a preferred employee and by the ability to provide the service as soon as possible. Travel minimization is considered as a second priority.

- **High Intensity**: This policy is typically used in times of high service volumes, in emergencies like a storm scenario, where the business focuses on employee productivity first and customer preferences are considered as a second priority.

- **Soft Boundaries**: This policy is identical to the Customer First policy, but allows the sharing of employees between different territories in order to enhance service coverage.

- **Emergency**: This is the default policy for the Emergency Dispatch quick action, which lets you quickly dispatch a resource to the emergency site with as few constraints as possible.

You can create additional scheduling policies to reflect your business needs. The dispatcher can select different scheduling policies while using the Gantt scheduling operations. The list of scheduling policies is located above the appointments list on the Dispatcher Console.

Checking Rule Violations

Rule violations occur when Field Service Lightning recognizes that an appointment schedule doesn't adhere to predefined scheduling rules. Examples of rule violations include travel time conflicts, and appointments that are not scheduled between their Earliest Start Permitted and Due Date.

Rule violations will not occur when using the Automatic Scheduling (such as Schedule action or Candidates action). The system will automatically choose schedules that do not violate any rules.

The Rule Violation list is displayed on your screen, listing the rules that have been violated.

If rule violations are incurred, a service appointment is marked with a yellow triangle. Hovering over the service appointment space shows the details and the list of the rules that have been violated, as shown below:

The set of rules taken into consideration on the Dispatcher Console is taken from the configured scheduling policy (located above the service list):

Unscheduling Service Appointments

In Field Service Lightning there are different ways to schedule service appointments.

You can unschedule service appointments from several places:

- Dispatcher Console – Service Appointment list mass Actions menu
- Service Appointment on the Gantt – Right click, then select **Unschedule**
- Changing service appointment status to **None**

Unscheduling an Appointment with Mass Actions

By using the unschedule option from the Service Appointment List Mass Actions menu, you can unschedule one or more service appointments at the same time.

While you're viewing a Gantt chart, you can unschedule service appointments.

Changing a service appointment status to None automatically unschedules it and removes it from the Gantt. You can change the status to None by simply editing the status field.

Unscheduling an Appointment with Mass Actions

By using the unschedule option from the Service Appointment List Mass Actions menu, you can unschedule one or more service appointments at the same time.

To unschedule an appointment with mass actions:

1. In the Service Appointment list, select the appointments(s) you want to unschedule.

2. On the list mass schedule menu, click Unschedule. The progress bar will appear on the bottom right.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To enable Field Service Lightning managed package:
- Customize Application

To assign a permission set license:
- Manage Users

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

Unscheduling an Appointment from the Gantt Chart

While you're viewing a Gantt chart, you can unschedule service appointments.

1. On the Gantt chart, select the service appointment(s) you want to unschedule. You can select more than one appointment by holding CTRL / CMD while clicking appointments.
2. Right-click on the selection to display the Gantt actions.
3. Click **Unschedule**.

Unscheduling an Appointment by Changing the Status to None

Changing a service appointment status to None automatically unschedules it and removes it from the Gantt. You can change the status to None by simply editing the status field.

Managing Service Resources

Resources represent technicians that are assigned to complete a service appointment.

[Add conrefs]

Creating and Deleting Service Resources

You can create and delete resources in Field Service Lightning.

Viewing a Service Resource's Calendar

Resource detail pages include a customizable calendar that shows the resource's scheduled services and absences. This makes it easier for dispatchers to get a snapshot of a resource's availability, and helps resources keep track of their schedule.

Often, technicians earn certifications that must be renewed periodically to ensure that their skills remain up-to-date. You can specify a time period for a resource's skill to make it easier to track active certifications and skill levels.

Creating and Deleting Service Resources

You can create and delete resources in Field Service Lightning.

- To create a resource, go to the Service Resources tab and click New. Update the necessary details and save your changes.
- To delete a resource, open the resource and click Delete.

Viewing a Service Resource's Calendar

Resource detail pages include a customizable calendar that shows the resource's scheduled services and absences. This makes it easier for dispatchers to get a snapshot of a resource's availability, and helps resources keep track of their schedule.

Follow these steps to control which information appears in the calendar:

1. Manage which fields appear in calendar entries for Service Appointments:

   a. From Setup, enter Appointment in the Quick Find box, then click **Field Sets** under Service Appointments.

   b. You can customize two field sets:

      - *Service Appointment Resource Calendar Display*: Controls what information appears on the calendar entry.

      - *Services Appointment Resource Calendar Tooltip*: Controls what information appears in a tooltip when you hover over the calendar entry.

2. Manage which fields appear in calendar entries for Resource Absences:

   a. From Setup, enter Absence in the Quick Find box, then click **Field Sets** under Resource Absence.

   b. You can customize two field sets:

      - *Resource absence Resource Calendar*: Controls what information appears on the calendar entry.

      - *Absence Resource Calendar Tooltip*: Controls what information appears in a tool tip when you hover over the calendar entry.

3. Use the Absence Color field to change the Resource Absence color displayed on the Gantt chart.

   Sometimes you want to represent different absences with different colors. For instance you might want to color a car break with Red and internal meeting with green. You can populate the gantt color field on the resource absence object with a 6 digit Hex code (in the format of #xxxxxx) and the absence block on the Gantt chart is colored in accordance.

   💡 **Tip:** Use the Process Builder to automate coloring of resource absence.

When you navigate to the Service Resources tab and click a resource name, you can now see their calendar. Clicking a field on a calendar entry opens the corresponding record in a new tab.

> **Note:** If you don't see the calendar on resource pages, add the VF079_ResourceCalendar Visualforce component to the resource page layout.

Assign a Resource Skill for a Given Time Period

Often, technicians earn certifications that must be renewed periodically to ensure that their skills remain up-to-date. You can specify a time period for a resource's skill to make it easier to track active certifications and skill levels.

For example, suppose a networking technician passed the networking certification exam, which grants him Level 2 router repair skills for one year. To reflect this time period on the resource record:

1. Navigate to the resource record.

2. Select the skill that the resource has gained. The Level and Phase fields appear next to the skill.

3. Under Phase, click **Add**. The skill phase options appear to the right.

4. Enter a start and finish date. If you don't specify a start date, the skill is considered valid since the beginning of time. If you don't specify an end date, the skill phase never expires.

5. Enter a skill level.

6. Click **Save**.

7. If desired, add additional skill phases by clicking **Add Phase**.

> **Note:** Users can define several skill phases for each resource, and skill phases can be assigned to different skill levels. For best results, keep all skill levels between 1 and 10, and don't create more than 50 time phases per skill.

FIELD SERVICE LIGHTNING ANDROID APP

The Field Service Lightning Android 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 Android app to meet your business' unique needs!

> 💡 **Tip:** The Field Service Lightning Android app doesn't have exactly the same functionality as the iOS Field Service Lightning app. Check out the Field Service Lightning iOS and Android Mobile App Comparison.

Table 1: Main Features of the Field Service Lightning Android App

Feature	Description
Offline Capable	The app works offline, so technicians can complete their work even with limited or no network connectivity.
Work Order Overview	The work order overview page lets your mobile workforce easily find info about their assignments. The intuitive UI serves information in discrete cards, so your mobile workforce can quickly find the info they need to get the job done. • The Asset History card shows other work orders associated with the same asset to give a complete picture of the service history of the asset. • The Work Order Line Item card intuitively displays the progress of complex jobs with multiple work order line items. You can also configure this card with a quick action to create more line items.
Service Appointment Card	The Service Appointment card lets you see high-level details about your appointment such as where it is on a map and your ETA.
Contact Card	Know who you'll be working with. The contact card lets your mobile workforce see the name and details of an associated contact record and communicate over their preferred communication channel.
Configurable Quick Actions	The app lets you configure actions to meet the unique needs of your mobile workforce. Quick actions let users take actions such as creating or updating a record.
Field Service App Extensions	Field Service App Extensions let you pass record data from the Field Service Lightning Android app and connect it to other apps such as Salesforce1. Only Lightning and third party app extensions are currently supported.
Signature Capture and Service Report Creation	Capture signatures from customers on service reports for completed work orders.

Feature	Description
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.
Push Notifications	Push notifications help your mobile workforce stay up to date, making sure they never miss an important event.
Salesforce Knowledge	Integration with Salesforce Knowledge lets Knowledge users provide useful information to your mobile workforce. Create Knowledge Articles with vital information like product manuals and step-by-step instructions.
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.
Inventory Tab	Empower your technicians to keep track of their inventory and track products consumed completing jobs.
Chatter	Communicate with dispatchers, partners and customers using Chatter.

Requirements for the Field Service Lightning Android App

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

Prepare for the Field Service Lightning Android App

Prepare your org for the Field Service Lightning Android app. Create permission set licenses for your mobile workforce, and install the managed package to support push notifications.

Get the Field Service Lightning Android App

Install the Field Service Lightning Android app on your mobile device from the Google Play Store. The Field Service Lightning mobile app is only available for supported Android devices to users with the Field Service Mobile license.

Customize the Field Service Lightning Android App

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

Push Notifications for the Field Service Lightning Android App

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

Working Offline With The Field Service Lightning Android App

Learn what data the app downloads for offline work and how syncing the app with Salesforce works.

Field Service Lightning Android App Limits and Limitations

Learn about the limits and limitations of the Field Service Lightning Android app and the supported data types.

Requirements for the Field Service Lightning Android App

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

Supported Devices

Supported Devices	Supported Mobile OS	Additional Requirements
All major Android devices are supported. The app is optimized for Samsung, Nexus, and Pixel devices.	Version 4.4 and later.	Google Play Services version 10.2.0 and 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 Lightning Android 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 use of the Field Service Lightning Android app.

Salesforce Editions	User License Types
Field Service Lightning features are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.	User License Required: • **Field Service Mobile**

Wireless Connection

The Field Service Lightning Android app is optimized for offline performance, but a Wi-Fi® or cellular network connection is needed for the app to communicate with your Salesforce org. 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 Android App

Prepare your org for the Field Service Lightning Android app. Create permission set licenses for your mobile workforce, and install the managed package to support push notifications.

🛑 **Important:** Starting with the 3.0.1 release, you must have version 1.38 of the managed package for push notifications to work properly.

Download the Managed Package

You must first install the managed package for the Field Service Lightning mobile app. The managed package gives technicians the ability to receive push notifications. To install the package, open the following link in your browser:

• https://sfdc.co/MobileFieldServiceAndroidPackage

Give Standard Users Access to the Field Service Lightning Android App

Give standard Salesforce users access to the Field Service Lightning Android app.

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.

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

Give Standard Users Access to the Field Service Lightning Android App

Give standard Salesforce users access to the Field Service Lightning Android app.

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. Click **New** to 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. Select the **Field Service Standard** and **Field Service Mobile** system permissions, then **Save**.

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 object permissions table. Ensure that your users have access to these objects by clicking **Object Settings** and consulting the object settings for each object. Select the field permissions you would like your users to have access to with this permission set. For each object's settings, click **Save** after you have finished assigning the object and field permissions.

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

8. Assign this permission set to your Field Service Lightning mobile app users by clicking **Manage Assignments**, then **Add Assignments**.

9. Check the box next to each user you wish to have access to the app with this permission set, and then click **Assign**.

Table 2: Object Permissions

Object Name	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 Resource	Read, Edit	Active, User
Work Order	Read, Create, Edit	

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.

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

Table 3: 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 Resource	Read, Edit	Active, User
Work Order	Read, Create, Edit	

The initial login in as a community user is slightly different in the app than it is for standard users. On the initial login screen, community users must click the settings button in the top right of the screen, then add a connection with the URL of your Salesforce community. The URL can be found in Setup under Communities. When inputting the community URL, omit the prefix "https://"

Associate Service Resources With Your Field Service Lightning Android Users

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. Click **New** to create a service resource.

3. Associate the service resource with the appropriate user, and select Active to activate the service resource.

4. Click **Save**.

Get the Field Service Lightning Android App

Install the Field Service Lightning Android app on your mobile device from the Google Play Store. The Field Service Lightning mobile app is only available for supported Android devices to users with the Field Service Mobile license.

You can download the Field Service Lightning Android app by searching for `Field Service Lightning` on the Play Store on your mobile device.

Device Permissions

When installing the app from the Play Store, you are prompted to give the app your device's location permissions. If you want to use the app's mapping functionality or track your team members' geolocation, approve the request..

Customize the Field Service Lightning Android App

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

⊗ **Important:** Users must re-log in to the app to recieve updates to metadata such as layouts.

Control the Schedule Screen (Android)

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

Control the Work Order Overview Screen (Android)

Learn about the various ways that you can control the overview screen for work orders and work order line items in the Field Service Lightning Android app. When a user taps on a service appointment from their schedule screen, they are taken to the work order overview.

Organizing the Work Order Carousel (Android)

Learn how you can configure different tabs in the work order carousel, such as the Chatter feed and products consumed.

Set Up Custom Actions For Your Mobile Workforce (Android)

Learn about the different types of actions you can configure for your mobile your workforce including quick actions, global actions, flows, and app extensions. Learn the order of actions on the action launcher in the app.

Control the Navigation Bar and Tabs (Android)

Learn about the Inventory and Profile tabs in the Field Service Lightning Android App and how to control them.

Brand the Field Service Lightning Android App

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

Track Service Resources With Geolocation (Android)

Use geolocation to get a bird's-eye view of your mobile workforces. And learn how to exclude certain users from geolocation tracking.

Control the Schedule Screen (Android)

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

The Field Service Lightning Android 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 customize the schedule screen to display work order and work order line item fields in a record preview. This screen uses the layout of the list view specified on the Field Service Mobile Settings page. If no list view is specified, it uses the search layout for service appointments.

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

Use Search Layouts to Control the Schedule Screen
Learn how to use a Search Layout to control the Service Appointment Schedule Screen when a default list view isn't selected in Setup.

Use a List View to Control the Schedule Screen (Android)
Configure the display of records on the schedule screen of the Field Service Lightning Android app by selecting a list view in Setup. A search layout is used to control the Schedule Screen only when there is no list view chosen in the Field Service Mobile Settings section of Setup.

Use Search Layouts to Control the Schedule Screen

Learn how to use a Search Layout to control the Service Appointment Schedule Screen when a default list view isn't selected in Setup.

Not all field types are supported in the Field Service Lightning Android app. We recommend reading Field Service Lightning Android App Limits and Limitations and consulting the supported types table before you configure layouts.

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

1. From Setup, enter `Service Appointments` in the Quick Find box, and select **Service Appointments** > **Search Layouts**. Select the layout for Search Results.

2. Use the **Selected Fields** list to arrange up to four fields to display on the schedule screen for every service appointment record. Only the top four fields in the Selected Fields list will display. The start time, end time, and address fields always display regardless of your selected fields.

3. Click **Save**.

4. Click **Edit** to update the default list view layout for service appointments.

5. Reorder the columns so the fields you want to display are at the top of the list.

6. Click **Save**.

Use a List View to Control the Schedule Screen (Android)

Configure the display of records on the schedule screen of the Field Service Lightning Android app by selecting a list view in Setup. A search layout is used to control the Schedule Screen only when there is no list view chosen in the Field Service Mobile Settings section of Setup.

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

Before following the steps below, configure a service appointment list view to control which records display on the schedule screen. Use the filter criteria to filter the records according to your use case. You can also select fields to display in columns on the schedule screen. Note the exact API name of the list view, because you'll need it to update your mobile display settings.

1. From Setup, enter `Field Service Mobile Settings` in the Quick Find box, then select **Field Service Mobile Settings**.

2. Locate the setting **Default List View Developer Name**, and then enter the API name for your service appointment list view.

3. Click **Save**.

If no list view is specified, the schedule screen uses the search layout for service appointments.

Control the Work Order Overview Screen (Android)

Learn about the various ways that you can control the overview screen for work orders and work order line items in the Field Service Lightning Android app. When a user taps on a service appointment from their schedule screen, they are taken to the work order overview.

Control Work Order Highlights (Android)

Use compact layout settings to control the display of work orders and service appointments in the Field Service Lightning Android app.

Add Cards to the Work Order Overview Screen(Android)

Use page layout settings for work orders and service appointments to control which cards are presented to the user on the work order overview screen.

Provide Knowledge Articles to Your Mobile Workforce (Android)

Learn how to give your mobile workforce useful, localized information like product manuals and step-by-step instructions by attaching Salesforce Knowledge articles to work orders.

Configure Service Reports for the Field Service Lightning Android App

Learn how to set up service reports for your mobile workforce with service reports by work type.

Control Work Order Highlights (Android)

Use compact layout settings to control the display of work orders and service appointments in the Field Service Lightning Android app.

On the Work Order Overview screen, the app displays a preview of the work order anchored at the top. The display of this anchor component is driven by the work order's compact layout settings.

You can configure up to five fields to display, and the first field is bolded. Consider what fields your users will want to be displayed most prominently before modifying an object's compact layout. Consult Field Service Lightning Android App Limits and Limitations to learn which fields you can use with the app.

💡 Tip: The first field on the Selected Fields list is used as the title of the work order overview, so it displays more prominently than the others. The Description field always displays beneath the title, and is followed by up to four more fields from the Selected Fields list.

1. From Setup, enter the `Work Orders` in the Quick Find box and select **Work Orders** > **Compact Layouts**.

2. Click **Edit** to configure the work order compact layout.

3. Add the field you wish to prominently display to the **Selected Fields** list if it isn't already there. Use the **Up** and **Down** buttons to order the fields so that the desired fields are at the top of the Selected Fields list.

4. Click **Save**.

Add Cards to the Work Order Overview Screen(Android)

Use page layout settings for work orders and service appointments to control which cards are presented to the user on the work order overview screen.

When a user selects a service appointment from the schedule screen, they are taken to the work order overview screen for that record. On this screen, the app displays information in cards, which are discrete spaces for different kinds of information. Adding or removing a field from the page layout does the same to the corresponding card. Refer to the table below for details on all cards that can be added to the work order overview screen. Think carefully about which cards your users will want to access from the work order overview screen and consult this list of Supported Field Types for Field Service Lightning Android.

Table 4: Possible Cards on the Appointment Overview Screen

Cards	Description
Service Appointment	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. The following fields on this card cannot be removed from it: Start Time, End Time, Date, Address, ETA (estimated time of arrival).
Contact	Shows the contact's name and photo and gives the option to call, message, or email the contact. This card shows the following fields and options and can't be customized: Customer Name, Phone, Message, Email.
Asset Service History	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. For this card to show in the app, the Asset field has to be in the work order's page layout, and the Work Orders related list needs to be included on the asset page layout. The asset history card uses the related list layout of the Work Orders related list on the asset page layout. You can configure up to four fields to display, and the top-most field displays more prominently than the others.
Work Order Line Item	Shows the progress of a parent work order or work order line item record and its child work order line item records. A "+" button lets users with the necessary object permissions create new child line items. The work order line item card always uses the work order line item number as the first field. You can display up to

Cards	Description
	three additional fields by modifying the work order line item related list properties.
Service Report	Add the Service Reports related list to the Service Appointment page layout.

1. From Setup, enter `Work Orders` in 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.

Provide Knowledge Articles to Your Mobile Workforce (Android)

Learn how to give your mobile workforce useful, localized information like product manuals and step-by-step instructions by attaching Salesforce Knowledge articles to work orders.

Salesforce Knowledge lets you create articles to address common questions your users may run into. Because Salesforce Knowledge is integrated with the Field Service Lightning mobile app, you can serve your 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.

🛑 **Important:** If a mobile app user's Android device is running in any of Salesforce's 26 supported languages, the app automatically translates the articles to the language of their mobile device's operating system. Otherwise, the app defaults to English.

Your mobile workforce can access knowledge articles from the Articles related list on their assigned work orders. Related lists are accessible in the app from the work order carousel under Related. Let your users know how to find the related list for knowledge articles in case they run into trouble out in the field.

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. Click **Edit** to update 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.

Limitations

Images in your Knowledge articles display normally if they are hosted outside of Salesforce. Knowledge articles that use images uploaded to Salesforce won't load those images.

EDITIONS

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

USER PERMISSIONS

To customize page layouts:
- Customize Application

Configure Service Reports for the Field Service Lightning Android App

Learn how to set up service reports for your mobile workforce with service reports by work type.

The Create Service Report Card

To give your mobile workforce the option to easily create service reports, add service reports as a related list to the page layout for service appointments.

1. From Setup, type `Service Report Templates` into the quick find box, then select **Service Report Templates**.

2. Click **Edit** to modify the `Standard Template`, or create a **New** service report template instead.

3. Configure the layout of your service report template. You can modify the template for different contexts, including `Service Appointment for Work Order` and `Service Appointment for Work Order Line Item`

   > ⛔ **Important:** For users to be able to create service reports the field `Work Type` must be present on the page layout for work order and work order line item. Conversely, the Work Type page layout must have the field `Service Report Template` on the page layout.

4. Click **Save** when your service report template has the desired layout.

   > 💡 **Tip:** You can add or remove the service report card from the Work Order Overview screen by adding or removing the service report related list on the page layout for Service Appointment.

Service Report Limitations

Service reports can't be generated while in offline mode.

Users can't see service report previews.

Multiple signature fields aren't supported on service reports.

<div style="float:right; border:1px solid #ccc; padding:8px;">

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

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Organizing the Work Order Carousel (Android)

Learn how you can configure different tabs in the work order carousel, such as the Chatter feed and products consumed.

Track Products Consumed By Your Mobile Workforce (Android)

When your mobile workforce use a product while completing a work order, they can track the consumption in the Field Service Lightning Android app. Update work order page layouts to add products consumed to the work order carousel.

Track Work with the Chatter Feed (Android)

Integrate Chatter into the Field Service Lightning Android app. The Chatter feed gives field service workers, dispatchers, and customers a place to communicate and collaborate. Chatter is available on work orders only.

Track Products Consumed By Your Mobile Workforce (Android)

When your mobile workforce use a product while completing a work order, they can track the consumption in the Field Service Lightning Android app. Update work order page layouts to add products consumed to the work order carousel.

Before you can track products consumed by your mobile workforce, you must first associate your service resources with a location such as their service vehicle. To learn more about setting up mobile locations, read Configure Locations to Track Your Mobile Inventory.

Add Products Consumed to Work Orders

1. From Setup, enter `Work Orders` in the Quick Find box, then select **Work Orders** > **Page Layouts**.

2. From the layout editor, add the **Products Consumed** related list to the work order page layout.

3. Click **Save**.

Use Layouts to Customize Products Consumed

You can use the products consumed related list layout to control how the app displays products consumed on the work order carousel. You can configure up to four fields to show in the app.

When your work force is searching for products to add to the products consumed list, the app displays product item records based on the search layout for product items. You can configure up to four fields to show in the app.

Track Work with the Chatter Feed (Android)

Integrate Chatter into the Field Service Lightning Android app. The Chatter feed gives field service workers, dispatchers, and customers a place to communicate and collaborate. Chatter is available on work orders only.

To hide or show the feed tab on the work order overview carousel, enable or disable feed tracking on work orders.

1. From Setup, enter `Chatter` in the Quick Find box and select **Feed Tracking**.

2. Select **Work Order** from the object list.

3. Select **Enable Feed Tracking**.

4. Click **Save.**

Supported Chatter Functions

- Creating posts
- Mentioning people and groups
- Commenting
- Bookmarking posts
- Deleting posts
- Liking posts
- Video, image, and PDF attachments

Chatter Limitations

Chatter is disabled when the app doesn't have internet access.

Users can't edit Chatter posts.

Set Up Custom Actions For Your Mobile Workforce (Android)

Learn about the different types of actions you can configure for your mobile your workforce including quick actions, global actions, flows, and app extensions. Learn the order of actions on the action launcher in the app.

You can create a variety of actions for your mobile workforce. The actions you configure for your workforce are activated in the app from the action launcher and are ordered according to the rules below.

Work Order Actions

1. App extensions and flows scoped to work orders (sorted alphanumerically)

2. Quick actions on the work order page layout (sorted according to page layout)

3. Hard coded actions for work orders such as Edit and View Detail

Service Appointment Actions

1. App extensions and flows scoped to service appointments (sorted alphanumerically)

2. Quick actions on the service appointment page layout (sorted according to page layout)

3. Hard coded actions for work orders such as Edit and View Detail

App Extensions

1. Flows scoped globally (sorted alphanumerically)

2. App extensions

Create App Extension Actions to Pass Data to Third Party Apps (Android)

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

Empower Users with Quick Actions (Android)

Add quick actions to an object's page layouts so your mobile workforce can create and edit records on the go and more.

Empower Your Mobile Workforce with Custom Tailored Flows

Learn how to use flows with the Field Service Lightning Android app. Visual Workflow lets you easily build and manage flows which are custom actions that 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 app for your mobile workforce to use.

Create App Extension Actions to Pass Data to Third Party Apps (Android)

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

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

- **Name**: The name of the extension.

- **Label**: The label as it appears to users in the app. The label isn't localized automatically.

- **Type**: A picklist of types of app extensions. Only Android apps and Lightning apps are supported..

- **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 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 varies slightly depending on if the app extension is scoped to an object or not. The Dynamic Value Tokens for App Extension Launch Value table shows the correct notation for object-scoped app extensions. If your app extension isn't scoped to an object, instead add a `$` after the first `!` in the dynamic value token.

> 💡 **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}**. If the app extension isn't scoped to an object, the above example would instead use the token **{!$User.userName}**.

Table 5: Dynamic Value Tokens for App Extension Launch Value

Dynamic Value Tokens	Description
{!Organization.Id}	The org id.
{!User.userId}	The object id for the user.
{!User.orgId}	The org id of the user.
{!User.userName}	The username of the user.
{!User.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.

Dynamic Value Tokens	Description
{!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 the Field Service Lightning Android 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 `Navigation` into the Quick Find box, and select **Salesforce 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.

Empower Users with Quick Actions (Android)

Add quick actions to an object's page layouts so your mobile workforce can create and edit records on the go 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, you can configure a quick action to easily update the status of an appointment. 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 work order overview screen has a consolidated action list for service appointments and work orders. This means that when a user clicks the action button from the work order overview screen, they will see a list of actions that are based on the page layouts of those objects.

Create a Quick Action for the Work Order Overview Screen

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

1. From Setup, enter `Work Orders` in the Quick Find box and select **Work Orders** > **Buttons, Links, and Actions**.

2. Click **New Action**.

3. Configure the action to either create a record or edit a record. Lightning Component, VisualForce, and custom override actions are not supported.

4. From Setup, enter `Work Orders` in the Quick Find box and select **Work Orders** > **Page Layouts**.

5. **Edit** the Work Order Layout.

6. From the layout editor, select **Quick Actions** then drag and drop your newly created action into the Quick Actions in the Salesforce Classic Publisher.

7. Click **Save** on the layout editor.

Limitations

Only quick actions that are in the Salesforce Classic Publisher are supported. Mobile & Lightning Actions aren't supported.

Empower Your Mobile Workforce with Custom Tailored Flows

Learn how to use flows with the Field Service Lightning Android app. Visual Workflow lets you easily build and manage flows which are custom actions that 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 app for your mobile workforce to use.

💡 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.

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.

Flow Limitations

- 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
- Flows aren't localized

Control the Navigation Bar and Tabs (Android)

Learn about the Inventory and Profile tabs in the Field Service Lightning Android App and how to control them.

The Inventory Tab
Learn about the inventory management system for the Field Service Lightning mobile app. Create locations for tracking products and associate them with service resources. Track the products consumed by your mobile workforce.

The Profile Tab
Learn about in-app settings, resource absences, and profile images in the profile tab.

The Inventory Tab

Learn about the inventory management system for the Field Service Lightning mobile app. Create locations for tracking products and associate them with service resources. Track the products consumed by your mobile workforce.

Add or Hide the Inventory Tab for the Field Service Android App
Learn about tracking products with mobile locations in the Field Service Lightning Android app, and using Product Item search layouts to customize them. Learn how to associate a mobile location to a service resource to show the inventory.

Customize the Product Tab With Search Layouts
Set up search layouts for product items to organize records in the inventory tab.

Add or Hide the Inventory Tab for the Field Service Android App

Learn about tracking products with mobile locations in the Field Service Lightning Android app, and using Product Item search layouts to customize them. Learn how to associate a mobile location to a service resource to show the inventory.

🛑 **Important:** Users must re-log in to the app to recieve updates to metadata such as layouts.

To hide or show the inventory tab for your mobile workforce add or remove a Location to their service resource. If no location of the type mobile is on the service resource record, the inventory tab isn't shown for that user. 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 inventory.

Before proceeding with the instructions, verify that the Location object has the Mobile Location on the Location page layout. Next, verify that the Service Resource object has the Location field on the Service Resource page layout. You also need to set operating hours before continuing with the instructions.

💡 **Tip:** The records on the Inventory tab are product item records and can be customized from Setup by configuring the Product Item search layout for Search Results. The app only displays the first 4 fields in the search layout.

1. From Salesforce, navigate to the Locations tab.
2. Create **New** location.

3. If you are creating a location record to represent inventory for your users, be sure to select Mobile Location.

4. Associate the van location with the service resource who uses the vehicle for field service.

5. Select the Service Resource tab or press the + in the navigation bar and then select Service Resource.

6. Select the service resource associated with your user, then use the location field to associate the newly created van location with the service resource.

Customize the Product Tab With Search Layouts

Set up search layouts for product items to organize records in the inventory tab.

Create a search layout for the product item 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 `Product Items` in the Quick Find box and select **Search Layout** for Product Items.

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

The Profile Tab

Learn about in-app settings, resource absences, and profile images in the profile tab.

Resource Absences in the Field Service Lightning Android App

Learn about types of resource absences and how to empower your mobile workforce to log their time off from work.

In-App Settings for Field Service Lightning (Android)

Learn about what users can do from the in-app settings which can be accessed by pressing the gear in the top right of the profile tab.

Setting Chatter Profile Images for Field Service Lightning (Android)

Learn about using the platform to set Chatter profile images for your users.

Add the Company Image to the Profile Tab

You can control the background image that displays behind a user's profile picture in the profile tab. First, upload an image for use as the background.

Resource Absences in the Field Service Lightning Android App

Learn about types of resource absences and how to empower your mobile workforce to log their time off from work.

Types of Resource Absence

The Type field on resource absences can be used to indicate the nature of the time off from work that a person is declaring. The default values on the picklist are Meeting, Training, Medical, or Vacation. The default value is Vacation. You can create custom types for your workforce to select from.

Empowering Users to Create Resource Absence Records

Your users need object and field permissions for resource absences to be able to create, read, edit, and delete resource absences in the app. The profile page in the app shows a "+" button on the card that lists the user's resource absences if the user has permission to create resource absence records. They can also edit and delete resource absences if given Edit or Delete permissions.

Your users are able to pick from the type of resource absence record based off the page layout settings of resource absence. When selecting the dates of their resource absence record, the picklist shows intervals of time based on the setting Picklist Time Interval in Minutes that you can configure in Field Service Mobile Settings.

Limitations

The profile page ignores layout settings for resource absences.

In-App Settings for Field Service Lightning (Android)

Learn about what users can do from the in-app settings which can be accessed by pressing the gear in the top right of the profile tab.

The Upload Queue

The upload queue shows pending uploads that the app sends to your org when internet access is restored. Each uploads represent the individual changes to records that the user has made in the order that they made them. If an upload in the queue encounters an error, the queue will pause until the error is resolved. Users can delete a pending upload by swiping it left and confirming the deletion.

Managing Accounts

The account management section gives users the option to log out with their current user, or the option to log in with a different account.

Providing Feedback

The provide feedback button prompts users to send feedback and comments about the app. This is send to Salesforce and not the admin of the org.

Setting Chatter Profile Images for Field Service Lightning (Android)

Learn about using the platform to set Chatter profile images for your users.

Users aren't able to take and set images for them to use as their Chatter profile from within the app. Instead, an admin or your users can change their Chatter profile image as normal from the platform.

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

Add the Company Image to the Profile Tab

You can control the background image that displays behind a user's profile picture in the profile tab. First, upload an image for use as the 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**.

Brand the Field Service Lightning Android App

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

🚫 **Important:** If your implementation of the app experienced changes to the user interface (UI) branding with the 3.0 update from 10/26/17, you may be experiencing a bug. The bug results in light colored UI elements indistinguishable from light colored backgrounds. Please update your branding tokens in **Setup** > **Field Service Mobile Settings** by changing the setting `NAVBAR BACKGROUND COLOR` to have the same value as `PRIMARY BRAND COLOR` to resolve this issue.

The Field Service Lightning Android 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.

Table 6: Branding Table

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

Token Name	Description	Default Value
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`.

Track Service Resources With Geolocation (Android)

Use geolocation to get a bird's-eye view of your mobile workforces. And learn how to exclude certain users from geolocation tracking.

Configure service resource tracking to have the Field Service Lightning Android app upload the geolocation of your mobile workforce to Salesforce at regular intervals. The geolocation accuracy settings have the following values for their estimated accuracy:

1. **Fine:** 10 meters

2. **Medium:** 100 meters

3. **Coarse:** 1 kilometer

4. **Very Coarse:** 3 kilometers

1. From Setup, enter `Field Service Mobile Settings` in the Quick Find box, and select **Field Service Mobile Settings**.

2. Click **Edit**.

3. Collect Service Resource Geolocation History to enable geolocation tracking for service resources.

4. Enter a value for Geolocation Update Frequency in Minutes to control how often geolocation is polled while the app runs in the foreground. Higher frequency increases battery consumption on mobile devices.

5. Enter a value for Geolocation Update Frequency in Minutes (Background Mode) to control how often geolocation is polled while the app runs in the background. Higher frequency increases battery consumption on mobile devices.

6. Set the Geolocation Accuracy to control how accurate the geolocation data is while the app runs in the foreground. Higher precision increases battery consumption on mobile devices.

7. Set the Geolocation Accuracy (Background mode) to control how accurate the geolocation data is while the app runs in the background. Higher precision increases battery consumption on mobile devices.

8. 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**.

Push Notifications for the Field Service Lightning Android App

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

> ⊘ **Important:** Starting with the 3.0.1 release, you must have version 1.38 of the managed package for push notifications to work properly.

You need Field Service notifications enabled and the Field Service Lightning Android 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/MobileFieldServiceAndroidPackage

Prerequisites

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

Notification Triggers

Your mobile workforce receive notifications for records that they follow. Notifications are sent out whenever:

- Chatter text or file post to a work order that you follow
- A feed-tracked change is posted to a work order that you follow
- An assignment change affects you, such as if a service appointment is assigned to or away from you

Working Offline With The Field Service Lightning Android App

Learn what data the app downloads for offline work and how syncing the app with Salesforce works.

Syncing Your Data

When the app has internet connectivity, it regularly synchronizes data with the Salesforce server. When working from offline, users will see a notification in the top navigation bar. Any changes made while offline are added to the Pending Upload queue. The Pending Upload queue tracks the changes you make while offline, and adds them in order of occurrence to the queue showing the order in which the app tries to upload changes to Salesforce server. If there is an error for any reason while uploading a change from the pending upload queue to Salesforce, the app automatically pauses the pending upload queue at that particular upload. Changes further down on the pending upload queue may be dependent on a prior change, so any conflict must be resolved before continuing with the queue. Tapping the top navigation bar with pending uploads takes the user to the upload queue. Alternatively the queue can be accessed from in-app settings in the profile tab.

There is currently no conflict resolution if the app for conflicting changes, which means that whatever conflicting change synchronizes with the Salesforce server last takes precedence.

What is data priming?

When a user logs in to the Field Service Lightning Android app, it automatically pre-downloads data, sometimes called priming, based on the service appointment record assigned to the user. The purpose of this priming is so that all the data that are relevant to a field service technician are available later on, even if they lose internet connectivity. This priming can take a few moments on the initial launch of the app or when a new user logs onto the app since the app may have to download a high volume of data.

What gets primed?

The data that the app primes for each user is based on the service appointments that are assigned to a user.

The app primes the following data, with a maximum priming depth of 2 records:

- Any Work Order that has a Service Appointment for which you are the assigned resource
- All Work Order Line Item records that are on the related list of a primed Work Order record
- The records on the related lists for Work Orders, Work Order Line Items, and Assets. Quick actions for Work Orders, Work Order Line Items, Service Appointments and Assets. Records that are referenced by a primed record's related list
- Field Service Mobile flows

Priming Rules Exceptions

1. A max of 25 records are primed from a related list. The last modified date (in descending order) determines which records are primed if there are more than 25 records on a related list.
2. Knowledge articles are an exception to the 25 record maximum and have no limit.
3. The service report related list is always primed, even if a service appointment doesn't have the service report related list on the page layout.
4. The app stops priming records that are too distant in their relation to a user's assigned service appointment record. This limit is called the priming depth, and the app has a priming depth of 2 records. This means that a record can have no more than 2 degrees of separation from the assigned service appointment for it to be automatically primed on the user's device.

Field Service Lightning Android App Limits and Limitations

Learn about the limits and limitations of the Field Service Lightning Android app and the supported data types.

EDITIONS

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

Limitations

- By default, there is no way to automatically open a record from the Field Service Lightning app in the Salesforce app without a Lightning app extension.
- Dependent picklists aren't supported in flows, quick actions, or global actions.
- Service closure flows aren't supported. This means that signature capture can't be included as the final step of a flow and must be performed separately.
- The field Pricebook ID can't be placed on the page layout of work order line items.
- Visualforce pages aren't supported, including actions and Visualforce components on page layouts.

Table 7: Supported Data Types

| Type	Supported
Auto Number	Yes
Formula	Yes
Roll-Up Summary	No
Lookup Relationships	No
External Lookup Relationship	No
Checkbox	Yes (shows "Yes/No")
Currency	Yes
Date	Yes
Date/Time	Yes (but not for the following fields: Schedule End, Scheduled Start, Arrival Window End, Arrival Window Start)
Email	Yes
Geolocation	Yes
Number	Yes
Percent	Yes
Phone	Yes
Picklist	No
Picklist (Multi-Select)	No
Text	Yes
Text Area	Yes
Text Area (Long)	Yes
Text Area (Rich)	No
Text (Encrypted)	No
TimeBETA	Yes
URL	Yes

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!

🛑 **Important:** With the 3.0 update to Field Service Lightning for iOS, users must have the RunFlow perm to be able to use flows. Also, before you get started, get informed! 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
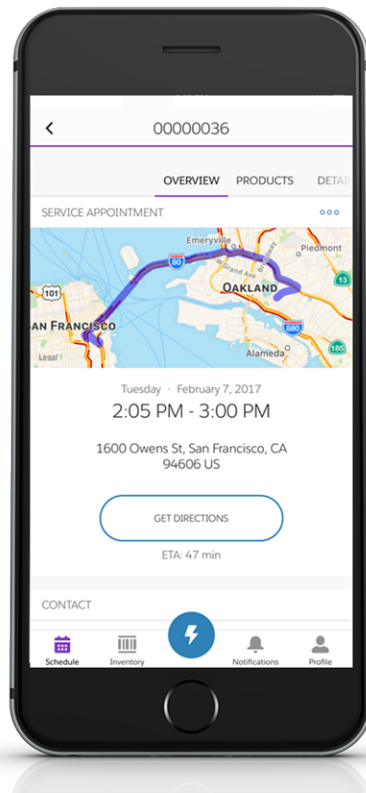
Table 8: Main Features of Field Service Lightning iOS Mobile App

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 Salesforce for iOS.
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.

⊘ **Important:** With the 3.0 update to Field Service Lightning for iOS, users must have the RunFlow perm to be able to use flows.

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

For users to be able to recieve push notifications 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 permission `API Enabled`. An admin can assign these permissions either through a permission set or user profile.
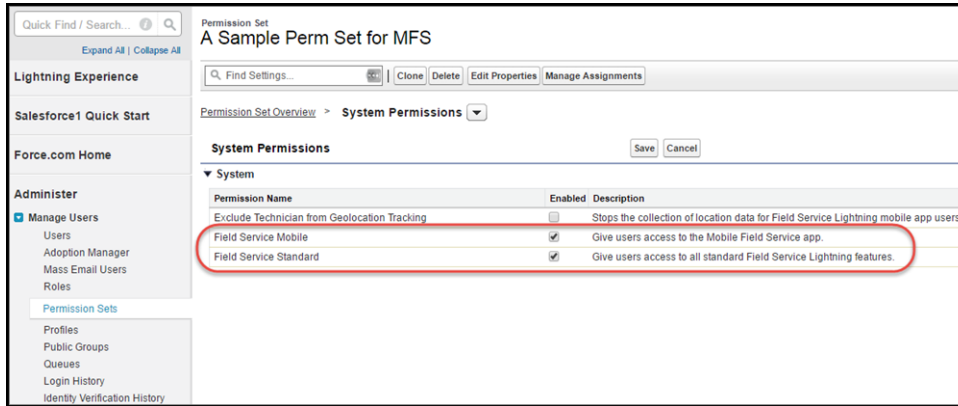
7. The object settings you choose for this permission set license can vary. However, Field Service Lightning mobile app users need access to the objects and fields in the following table:

Table 9: 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 Assigniments**.

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.

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1. Go to the Service Resources tab.

2. Create a **New** service resource.

3. Associate the service resource with the appropriate user.

4. Make the service resource **Active**.

5. Click **Save**.

Add Service Report to Service Appointment Page Layout

1. From Setup, type `Service Appointment` into the Quick Find box, then select **Service Appointments** > **Page Layouts**.

2. **Edit** the service appointment layout.

3. From the layout editor, select **Related Lists**.

4. Drag and drop the **Service Reports** related list onto the page layout.

5. Click **Save**.

Get the Field Service Lightning Mobile App

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

> 📝 Note: The Field Service Lightning mobile app is only available for supported iOS devices to users with the Field Service Mobile user license. For more information on the requirements, read Field Service Lightning Mobile App Requirements.

EDITIONS

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

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, 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 iOS 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.

Track Service Resources with Geolocation

Track your service resources with geolocation and learn about excluding service resources from geolocation tracking.

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

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.

<table>
<tr><td>EDITIONS</td></tr>
</table>

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

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. Use **Select Fields to Display** to select which fields to display to your users. Lookup fields aren't supported on the schedule screen and won't show up.

7. Under **Restrict Visibility**, select **Visibile to all users**.

8. Click **Save**.

9. From **Setup** enter `Field Service Mobile` into the Quick Find box.

10. Click **Edit**.

11. Locate the setting **Default list view Developer Name**. Enter the **View Unique Name** of your recently created list view.

12. 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

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, 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 10: 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.

Dynamic Value Tokens	Description
{!$User.orgId}	The org id of the user.
{!$User.userName}	The username of the user.
{!$User.nickName}	The nick name of the user.
{!$User.displayName}	The display name of the user.
{!$User.email}	The email address of the user.
{!$User.firstName}	The first name of the user.
{!$User.lastName}	The last name of the user.
{!$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 `Navigation` into the Quick Find box, and select **Salesforce 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.

> ⛔ **Important:** Starting with the 3.0 release of Field Service Lightning for iOS, users must have the RunFlows perms to be able to run flows. The 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

EDITIONS

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

USER PERMISSIONS

To create workflows:
- Customize Application

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 iOS App

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

> ⊘ **Important:** For users to be able to create service reports the field `Work Type` must be present on the page layout for work order and work order line item. Conversely, the Work Type page layout must have the field `Service Report Template` on the page layout.

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.

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

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.

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.

EDITIONS

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

USER PERMISSIONS

To customize page layouts:
- Customize Application

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.

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.

EDITIONS

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

USER PERMISSIONS

To customize branding colors:
- Customize Application

Table 11: Branding Table

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

Token Name	Description	Default Value
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**.

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**.
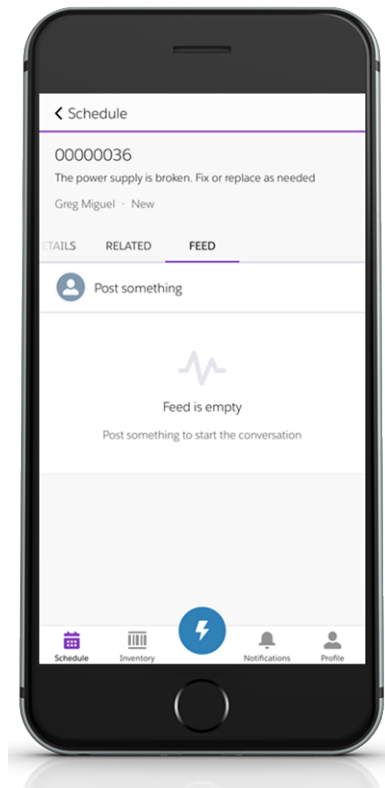
4. Click **Save.**

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.

Track Service Resources with Geolocation

Track your service resources with geolocation and learn about excluding service resources from geolocation tracking.

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. **Collect Service Resource Geolocation History** to enable geolocation tracking for service resources.

4. Enter a value for **Geolocation Update Frequency in Minutes** to control how often geolocation is polled.

5. Enter a value for **Geolocation Update Frequency in Minutes (Background Mode)** to control how often geolocation is polled when the app is running in the background of the mobile device.

6. Set the **Geolocation Accuracy** to control how accurate the geolocation data is. Higher precision increases battery consumption on mobile devices.

7. Click **Save**.

Excluding Individuals From Geolocation Tracking

You can exclude individuals from geolocation tracking even with **Collect Service Resource Geolocation History** 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**. 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**.

Individual mobile users can also turn off location tracking for the Field Service Lightning mobile app from their phone's operating system settings.

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.

Control Record Highlights with Compact Layouts

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

Control the Appointment Overview Screen with Page Layouts

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

Control the Schedule Screen with Search Layouts

Control the main schedule screen of the Field Service Lightning 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.

Control Record Highlights with Compact Layouts

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

When a record is presented as a record highlight (showing a preview of the record) the display is driven by the compact layout settings of that record. The top-most field in a record's compact layout is displayed prominently, while the 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**.

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

EDITIONS

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

USER PERMISSIONS

To modify compact layouts:
- Customize Application

Control the Appointment Overview Screen with Page Layouts

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

When a user selects a service appointment from the schedule screen, they are taken to the appointment overview screen. On this screen, the Field Service Lightning 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.

Table 12: 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. Lookup fields aren't supported on the schedule screen and won't show up.

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)

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

- Open in Salesforce (This option only appears if Salesforce app is installed on the mobile device)

⊘ **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.

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.

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

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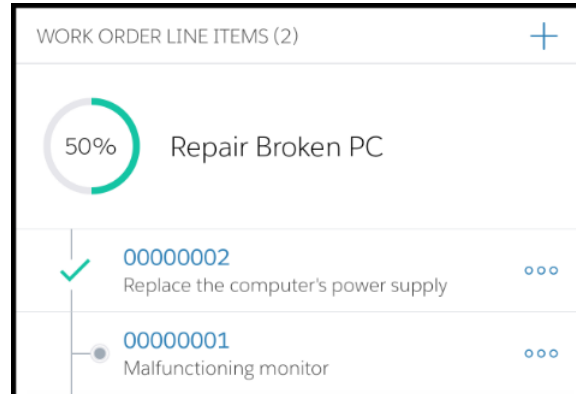
**Control Which Fields Are Previewed in the Work Order Line Item Card**

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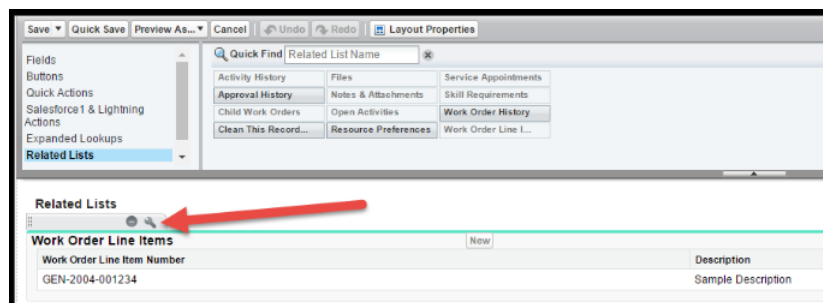
4. Add your desired field to be one of the top two fields in the Selected Fields column. You will see a list of available fields and select fields. Move fields into the select fields column with the **Add** arrow, or out with the **Remove** arrow. Sort the order of the selected fields with the **Up**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

5. Click **Save**.
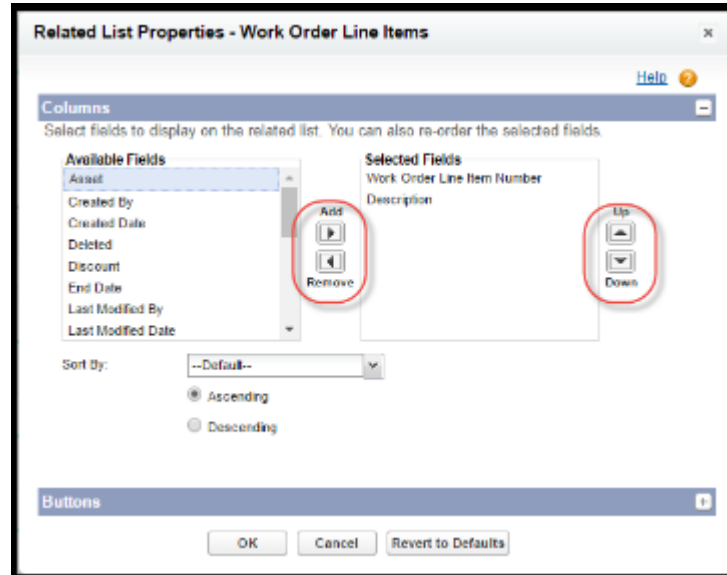
Inventory Management with the Field Service Lightning Mobile App

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.

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.
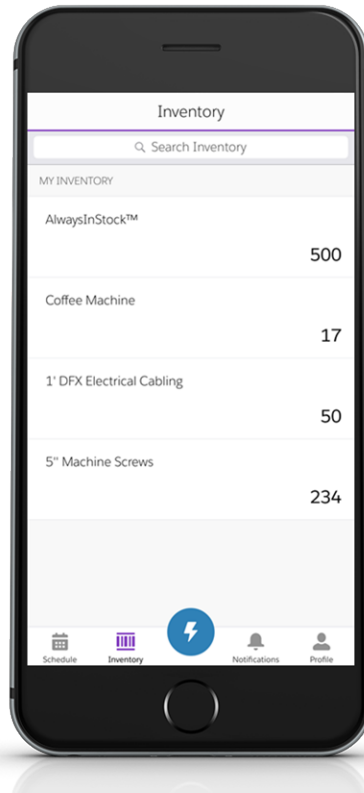
Using Price Books To Track Products

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.

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

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, the Salesforce app, 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 Salesforce Lightning Experience, the mobile app, and the Field Service mobile app about updates to work orders and service appointments**.

    > Note: Selecting this option also enables notifications for relevant users in the Salesforce app 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 13: 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

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 has the following limitations:

  - Compatible with 1D serial barcodes and 2D QR codes only

  - The barcode scanner can only be used to search for existing barcodes in your org, and cnanot be used to add new barcodes to your org.

- 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.

EDITIONS

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

- 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.

- Lookup fields aren't supported on the schedule screen and won't show up.

- Visualforce pages aren't supported, including actions and Visualforce components on page layouts.

Working Offline With the Field Service Lightning iOS App

Learn what data the app downloads for offline work and how syncing the app with Salesforce works.

Syncing Your Data

When the app has internet connectivity, it regularly synchronizes data with the Salesforce server. When working from offline, users will see a notification in the top navigation bar. Any changes made while offline are added to the Pending Upload queue. The Pending Upload queue tracks the changes you make while offline, and adds them in order of occurrence to the queue showing the order in which the app tries to upload changes to Salesforce server. If there is an error for any reason while uploading a change from the pending upload queue to Salesforce, the app automatically pauses the pending upload queue at that particular upload. Changes further down on the pending upload queue may be dependent on a prior change, so any conflict must be resolved before continuing with the queue. Tapping the top navigation bar with pending uploads takes the user to the upload queue. Alternatively the queue can be accessed from in-app settings in the profile tab.

There is currently no conflict resolution if the app for conflicting changes, which means that whatever conflicting change synchronizes with the Salesforce server last takes precedence.

What is data priming?

When a user logs in to the Field Service Lightning iOS app, it automatically pre-downloads data, sometimes called priming, based on the service appointment record assigned to the user. The purpose of this priming is so that all the data that are relevant to a field service technician are available later on, even if they lose internet connectivity. This priming can take a few moments on the initial launch of the app or when a new user logs onto the app since the app may have to download a high volume of data.

What gets primed?

The data that the app primes for each user is based on the service appointments that are assigned to a user.

The app primes the following data, with a maximum priming depth of 2 records:

- Any Work Order that has a Service Appointment for which you are the assigned resource

- All Work Order Line Item records that are on the related list of a primed Work Order record

- The records on the related lists for Work Orders, Work Order Line Items, and Assets. Quick actions for Work Orders, Work Order Line Items, Service Appointments and Assets. Records that are referenced by a primed record's related list

- Field Service Mobile flows

Priming Rules Exceptions

1. A max of 25 records are primed from a related list. The last modified date (in descending order) determines which records are primed if there are more than 25 records on a related list.

2. Knowledge articles are an exception to the 25 record maximum and have no limit.

3. The service report related list is always primed, even if a service appointment doesn't have the service report related list on the page layout.

4. The app stops priming records that are too distant in their relation to a user's assigned service appointment record. This limit is called the priming depth, and the app has a priming depth of 2 records. This means that a record can have no more than 2 degrees of separation from the assigned service appointment for it to be automatically primed on the user's device.

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