Field Service Lightning Managed Package Guide

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18

@salesforcedocs

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CONTENTS

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

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USER PERMISSIONS

To install the 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

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.

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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.

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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**.

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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.

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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

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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.

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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.

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.

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.

Service Appointment Lifecycle in the Field Service Lightning Managed Package

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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

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.

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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.

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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.

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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.

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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.

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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.

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To create a permission set:
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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.

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- 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**.

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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.

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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.

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

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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).

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- 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.

Dispatcher Console Option Button

The Options button lets you customize the Gantt data and gives you access to viewing and other dispatcher console settings.

Dispatcher Console Territory Filtering

You can filter appointments by service territories.

Dispatcher Console Gantt Chart Settings

Customize your Gantt chart to display details you want to see.

Dispatcher Console Option Button

The Options button lets you customize the Gantt data and gives you access to viewing and other dispatcher console settings.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

Dispatcher Console Territory Filtering

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

View Resource Availability by Month

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

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

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.

EDITIONS

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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.

EDITIONS

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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.

Changing an Appointment Status on Service Appointment Detail Page

You can go to a service appointment detail page to change an appointment's status.

Automatic Appointment Status Change

The Service Appointment status can be changed automatically or manually by the dispatcher or the field resource.

Scheduling Policies

Field Service Lightning includes scheduling policies.

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.

Scheduling a Service Appointment Manually

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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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.

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.

EDITIONS

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USER PERMISSIONS

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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**.

EDITIONS

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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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

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

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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.

EDITIONS

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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.

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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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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):

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Unscheduling an Appointment from the Gantt Chart

While you're viewing a Gantt chart, you can unschedule service appointments.

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.

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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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**.

EDITIONS

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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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Managing Service Resources

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

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EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

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.

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

EDITIONS

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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.

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