

Field Service Developer Guide

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CHAPTER 1 Field Service Developer Guide

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- Get Ready to Develop with Field Service
- API End-of-Life
- Field Service Data Objects
- Field Service REST API
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- Field Service Apex Namespace
- Field Service Custom Triggers
- Field Service Code Examples
- Field Service Mobile App

Developers, start your computers! Field Service is a powerful, highly customizable toolbox of features that you can use to set up and manage a multiplatform, mobile service operation. This guide offers reference information and code examples to help you understand the structure of Field Service features and customize them with code.

This guide includes:

- Object diagrams that illustrate the relationships between field service data objects
- Reference information for field service objects in the REST, Metadata, and Tooling APIs
- Apex reference information for the Field Service managed package
- Apex code examples that you can use to complete common field service tasks

If you're new to field service, we recommend checking out Get on the Road with Field Service in Trailhead. Then visit the Field Service learning map (English only) to find curated links to documentation, blogs, Trailhead modules, and other resources.

Happy coding!

SEE ALSO:

Install the Field Service Managed Package Field Service Mobile App

Get Ready to Develop with Field Service

To prepare to work programmatically with field service features, verify that Field Service is enabled in your org.

- 1. From Setup, enter Field Service Settings in the Quick Find box, then select Field Service Settings.
- 2. Verify that Field Service is enabled.
- 3. Click Save.

You now have access to Salesforce's standard field service objects, which are listed in this guide. However, that's just the beginning! To get your feet wet before you start working programmatically with Field Service, it's a good idea to walk through the setup tasks outlined in Set Up Field Service.

API End-of-Life

Salesforce is committed to supporting each API version for a minimum of three years from the date of first release. In order to mature and improve the quality and performance of the API, versions that are more than three years old might cease to be supported.

When an API version is to be deprecated, advance notice is given at least one year before support ends. Salesforce will directly notify customers using API versions planned for deprecation.





Field Service Data Objects

Field Service is based on a suite of standard and custom Salesforce objects that relate to each other in different ways. These objects also serve as the foundation of the Field Service managed package and mobile app.

The following object relationship diagrams and reference information are your field service object dictionary. Use them to guide your implementation decisions. You can create, retrieve, update, or delete field service records and objects, through our SOAP and REST APIs. You can guery these objects using SOQL (Salesforce Object Query Language).

IN THIS SECTION:

Field Service Core Data Model

Use Field Service's core objects to complete essential field service tasks such as managing work orders, defining your service territories, and tracking your workforce.

Field Service Inventory Management Data Model

Use Field Service's inventory objects to track the storage, request, consumption, return, and retirement of items in your inventory.

Field Service Preventive Maintenance Data Model

Manage periodic maintenance with the help of maintenance plans, which define the maintenance schedule for specific assets. Maintenance plans typically reflect the terms in a customer's service contract or entitlements.

Field Service Product Service Campaign Data Model

Use product service campaign to record the actions to address situations such as product recalls, manual firmware upgrades, safety or compliance audits, or end-of-life communications. Assets affected are associated with a campaign using product service campaign items. Campaign and campaign items can then be associated with work orders and return orders as needed to complete the work.

Field Service Warranty Management Data Model

Use warranty items to record details of the labor, parts, and expenses, along with any exchange options, that are provided to rectify issues with products sold or installed. Create standard warranties for products and product families and, for products you install, record details of additional or extended warranties along with exclusions and void terms.

Field Service Pricing Data Model

Link work orders to products or assets in your org to track product pricing and work being performed on your customers' installed products.

Field Service Object References

Object reference for standard and custom Salesforce objects used in Field Service.

SEE ALSO:

Salesforce SOAP API Developer Guide Salesforce REST API Developer Guide Salesforce SOQL and SOSL Reference

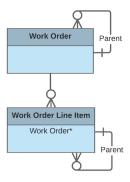
Field Service Core Data Model

Use Field Service's core objects to complete essential field service tasks such as managing work orders, defining your service territories, and tracking your workforce.



Note: Asterisks in the following diagrams signify required fields.

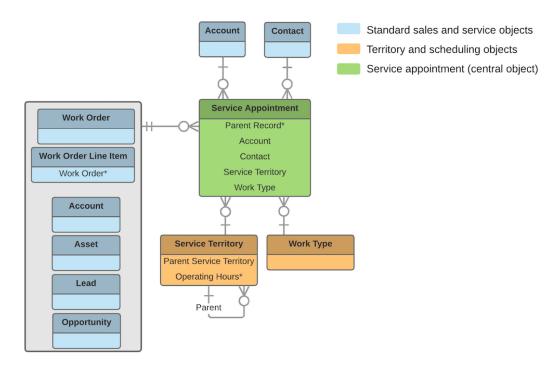
Work orders represent work to be completed for your customers, and are central to field service operations in Salesforce. To divide the work further for billing purposes or to track subtasks, add work order line items, which are child records of work orders.



Work orders offer a great deal of flexibility. They can be associated with many types of records, including:

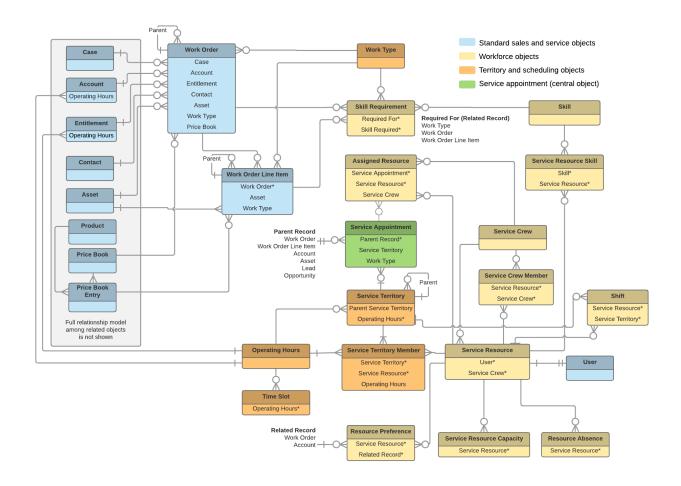
- Assets, to track work performed on a specific asset
- Cases, to indicate that the work is being performed as part of a customer case
- Accounts and contacts, representing the customer
- Entitlements and service contracts, to indicate that the work is being done to fulfill a service-level agreement

While work orders describe the work to be performed, *service appointments* represent the visits your team makes to the field to perform the work. They include scheduling settings such as an arrival window, scheduled start and end times, and appointment duration. Every service appointment has a parent record. The parent record is typically a work order or work order line item, but you can also add child service appointments to accounts, assets, leads, or opportunities to track related visits. A record can have multiple child service appointments; for example, a work order may have two service appointments if two visits were needed to complete the work.



If your team often performs the same tasks for multiple customers, create *work types* to standardize your field service work. Work types are templates that can be applied to work orders and work order line items. On a work type, you can define the duration of the work and add *skill requirements* to indicate the level of expertise needed to complete the work. You can also opt to auto-create a child service appointment on any record that uses the work type.

Work orders and service appointments are supported by a variety of objects that control when and where the work occurs, the nature of the work, and who performs it.



Who Performs the Work

Members of your mobile workforce are represented in Salesforce as *service resources*. A service resource represents an individual technician who can be assigned to a service appointment. You can also create *service crews*, which are groups of service resources with complementary skills and experience that can be assigned to appointments as a unit.

To assign a service resource to a service appointment, create an *assigned resource* record. Assigned resources contain lookups to a service resource and a service appointment. To assign a service crew to an appointment, first create a representative service record with a resource type of Crew. Then, create an assigned resource record that looks up to the Crew service resource.

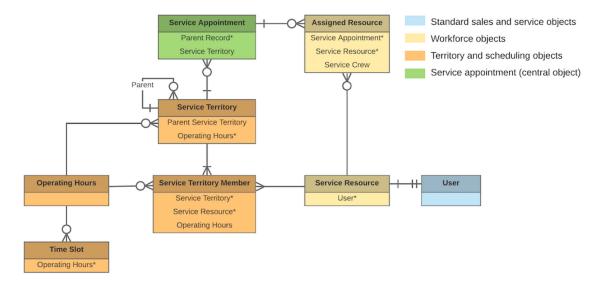
Service resources come with several objects that let you define their skills and availability:

- Service resource skills represent a service resource's certifications or levels of expertise.
- Resource capacity records track the hourly or job-based capacity of contractors.
- Resource absences represent time when a service resource needs to miss work.
- Resource preferences designate specific service resources as preferred, required, or excluded on a work order or account.

Where the Work Occurs

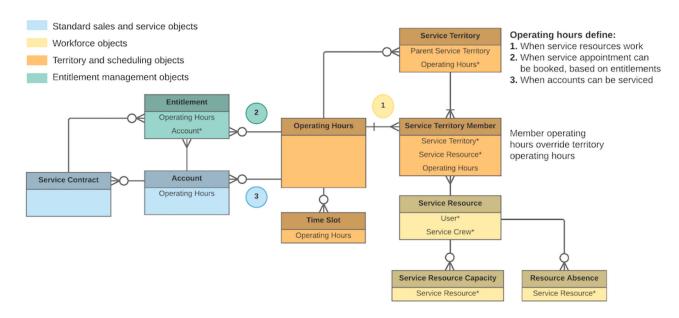
Service territories are the places where your team can perform field service work and are a way to organize your service resources. They typically represent geographic territories such as cities or counties but may also represent functional divisions like sales versus service.

A work order can be associated with one service territory. Service resources are assigned to one or more service territories as service territory members to indicate that they are available to work in the territory.



When the Work Occurs

Operating hours indicate when your team can perform field service work. They can be assigned to accounts, service territories, and service territory members. To add detail to operating hours, create *time slots*, which represent the hours of operation in a particular day.



If a customer *entitlement* includes terms regarding when the customer has access to field service, you can track these hours on the entitlement using the **Operating Hours** field (API name: SvcApptBookingWindowsId). For example, if Customer A is entitled to service Monday through Friday from 8 AM to noon, but Customer B is entitled to 24/7 service, you can create operating hours for each customer and assign them to the related entitlement.

SEE ALSO:

Guidelines for Creating Operating Hours for Field Service

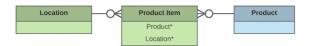
Field Service Inventory Management Data Model

Use Field Service's inventory objects to track the storage, request, consumption, return, and retirement of items in your inventory.



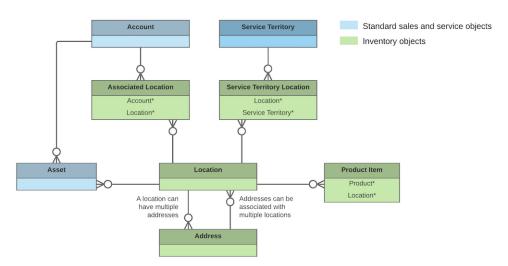
Note: Asterisks in the following diagrams signify required fields.

Inventory management starts with *product items*, which represent the stock of a particular product at a particular location. Each product item is associated with a *product* and a *location* in Salesforce. For example, if you have 50 hammers stored in your Warehouse A location and 200 stored in Warehouse B, create one product item for each location. Product items list a quantity at the location that is updated automatically when inventory is transferred or consumed.



If the Inventory Location option is selected on a location, it means that inventory can be stored there. Product items can be associated only with inventory locations.

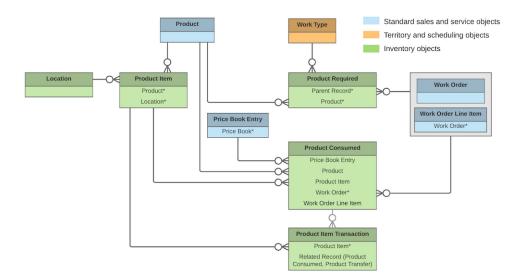
You can link a location to multiple *accounts* and *service territories*. For example, if a location is a shopping mall, you can choose to associate it with every account that operates a store in the mall. You can also create *addresses* for a location, such as a mailing and home address. And to keep track of customer sites, create *associated locations*, which contain lookups to an *account* and a *location*.



If a particular product is needed to complete a field service job, add *products required* to ensure that the assigned service resources arrive prepared. Products required can be child records of *work orders, work order line items*, and *work types*. Work order and work order line items inherit their work type's products required.

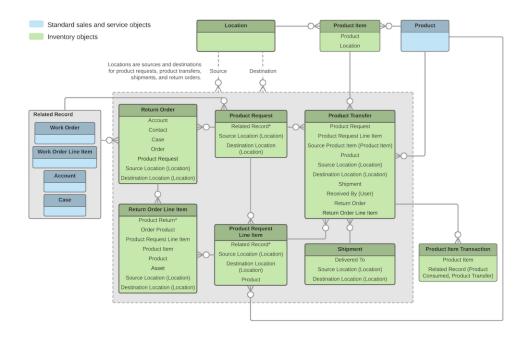
When a product is consumed during the completion of a work order, track its consumption by creating a *product consumed* record. You can add products consumed to work orders or work order line items. Track product consumption at the line item level if you want to know which products were used for each line item's tasks.

The way you use products consumed depends on how closely you want to track the state of your inventory in Salesforce. If you want to track the entire life cycle of items in your inventory, including their storage, transfer, and consumption, link your product consumed records to product items. This approach ensures that your inventory numbers update automatically to reflect the consumption of products from your inventory. If you want to track product consumption only, however, specify a **Price Book Entry** on each product consumed record and leave the **Product Item** field blank.



The movement of items into and out of your inventory and between locations is tracked using these objects:

- Product requests are orders for products, which you might create when stock is running low.
- Product request line items are subdivisions of a product request.
- Product transfers track the movement of product items between inventory locations.
- Shipments represent the shipment of product items between locations.
- *Product item transactions* describe actions performed on a product item. They're auto-generated records that help you track when inventory is replenished, consumed, or adjusted.
- Return orders track the return of a product item due to damage, order errors, or other reasons.
- Return order line items are subdivisions of a return order.



SEE ALSO:

Set Up Your Field Service Inventory Guidelines for Transferring Inventory Guidelines for Consuming Inventory Common Inventory Management Tasks

Field Service Preventive Maintenance Data Model

Manage periodic maintenance with the help of maintenance plans, which define the maintenance schedule for specific assets. Maintenance plans typically reflect the terms in a customer's service contract or entitlements.



Note: Asterisks in the following diagram signify required fields.

A maintenance plan can be linked to an account and contact—representing the customer—and, if the customer has one, to a service contract.

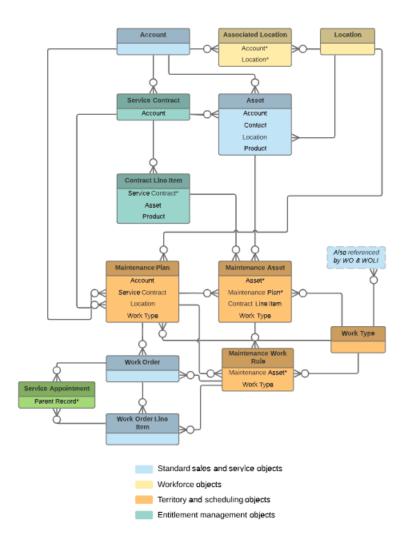
A maintenance plan can cover multiple *assets*. For example, you can create a maintenance plan to track the monthly maintenance of 20 laser printers installed in a customer's office building. The assets covered by a maintenance plan are represented as child records of the maintenance plan called *maintenance assets*. For more complex reoccurring maintenance, you can define *maintenance work rules* for most assets and maintenance plans. With this feature you can, for example, set up a schedule for minor monthly maintenance and a major yearly service. You can also link a maintenance plan to a *location* to indicate where the assets are installed. For example, link a plan to a location of the Site type that represents the office building where the printers are installed.

After you create a maintenance plan or maintenance work rules, it's time to generate work orders for the planned maintenance visits. Maintenance plans come with a Generate Work Orders quick action, which can also be called with Apex code. Your maintenance plan settings determine how many work orders and work order line items are generated at once and what their settings are. You can opt to generate one work order per maintenance asset for each visit, or a parent work order for each visit with one work order line item per maintenance asset.

Maintenance plans, maintenance assets, and maintenance work rules can be associated with a work type:

• If you specify a work type on a maintenance plan, the plan's work orders use that work type.

- If you specify a work type on a maintenance asset, generated work orders that are associated with the maintenance asset use the maintenance asset's work type.
- If you specify a work type on a maintenance work rule, generated work orders that are associated with the maintenance work rule use the maintenance work rule's work type.



SEE ALSO:

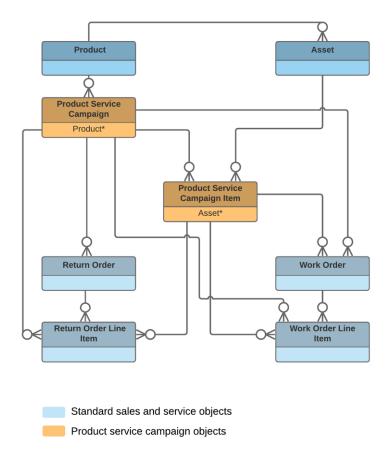
Generate Work Orders on Maintenance Plans with Apex

Field Service Product Service Campaign Data Model

Use product service campaign to record the actions to address situations such as product recalls, manual firmware upgrades, safety or compliance audits, or end-of-life communications. Assets affected are associated with a campaign using product service campaign items. Campaign and campaign items can then be associated with work orders and return orders as needed to complete the work.

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Note: Asterisks mean these fields are required.



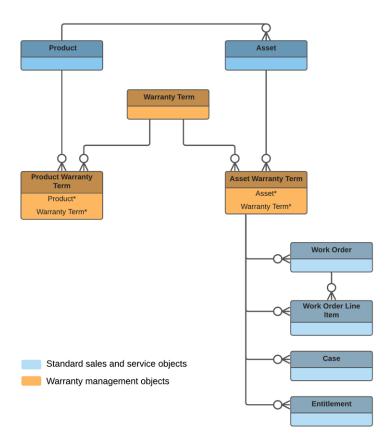
Field Service Warranty Management Data Model

Use warranty items to record details of the labor, parts, and expenses, along with any exchange options, that are provided to rectify issues with products sold or installed. Create standard warranties for products and product families and, for products you install, record details of additional or extended warranties along with exclusions and void terms.



Note: Asterisks in the following diagram signify required fields.

A warranty term is linked to a product warranty term to define the standard warranty offered for a product or product family. When a product is installed, asset warranty term details are created from the standard warranty. An asset warranty term can be associated with a work order, work order line item, case, or entitlement to track actions related to the fulfillment of the warranty term provisions.

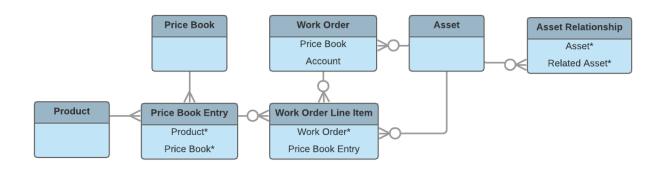


Field Service Pricing Data Model

Link work orders to products or assets in your org to track product pricing and work being performed on your customers' installed products.



Note: Asterisks in the following diagram signify required fields.



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

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

After a product is purchased and installed for a customer, it is typically tracked as an *asset* in Salesforce. The Asset lookup field on work orders and work order line items allows you to track work being performed on a specific asset. It also makes it possible to view a history of all work completed on the asset.

If an asset is replaced or upgraded, the relationship between the old and new asset is tracked in an *asset relationship* record. An asset relationship lists a start and end time—for instance, if the replacement asset is being leased—and a relationship type, which must be defined by the admin.

SEE ALSO:

Work Order Pricing Guidelines for Field Service Equal Asset Relationships

Field Service Object References

Object reference for standard and custom Salesforce objects used in Field Service.

IN THIS SECTION:

Field Service Standard Objects

A list of standard Salesforce objects used in Field Service.

Field Service Custom Fields on Standard Objects

A list of custom fields on standard Salesforce objects installed with the Field Service managed package.

Supplementary Field Service Objects

A list of Field Service objects that support history tracking or sharing.

Field Service Standard Objects

A list of standard Salesforce objects used in Field Service.

The following list links to reference information for the standard objects. Some objects are specific to Field Service, while others are used across a variety Salesforce features.



Note: Most objects are available only if Field Service is enabled. Objects not tied to Field Service enablement are shown with an asterisk (*).

IN THIS SECTION:

Address

Represents a mailing, billing, or home address.

ApptBundleAggrDurDnscale

Sums the duration of the bundle members, reduced by a predefined percentage. This object is available in API version 54.0 and later.

ApptBundleAggrPolicy

Policy that defines how the property values of the bundle members are aggregated and assigned to the bundle. This object is available in API version 54.0 and later.

ApptBundleConfig

Represents the general parameters that define the behavior of the bundle. This object is available in API version 54.0 and later.

ApptBundlePolicy

Policy that defines how the bundling of service appointments should be handled. This object is available in API version 54.0 and later

ApptBundlePolicySvcTerr

Represents a link between the BundlePolicy and the ServiceTerritory. This object is available in API version 54.0 and later.

ApptBundlePropagatePolicy

Policy that defines which property values are inherited from the bundle to the bundle members or are assigned as constant values in the bundle members. This object is available in API version 55.0 and later.

ApptBundleRestrictPolicy

Policy that defines the restrictions that are considered while forming a bundle. This object is available in API version 54.0 and later.

ApptBundleSortPolicy

Policy that defines the properties by which the bundle members are sorted within the bundle. Can also be used in the automatic mode for determining the order of the automatic selection of bundle members. This object is available in API version 54.0 and later.

AppExtension

Represents a connection between the Field Service mobile app and another app, typically for passing record data to the Salesforce mobile app or other apps. This object is available in API version 41.0 and later.

Asset*

Represents an item of commercial value, such as a product sold by your company or a competitor, that a customer has purchased.

AssetDowntimePeriod 2

Represents a period during which an asset is not able to perform as expected. Downtime periods include planned activities, such as maintenance, and unplanned events, such as mechanical breakdown. This object is available in API version 49.0 and later.

AssetRelationship*

Represents a non-hierarchical relationship between assets due to replacement, upgrade, or other circumstances.

AssetWarranty

Defines the warranty terms applicable to an asset along with any exclusions and extensions. This object is available in API version 50.0 and later.

AssignedResource

Represents a service resource who is assigned to a service appointment in Field Service and Lightning Scheduler. Assigned resources appear in the Assigned Resources related list on service appointments. This object is available in API version 38.0 and later.

Associated location

Represents a link between an account and a location in Field Service. You can associate multiple accounts with one location. For example, a shopping center location may have multiple customer accounts.

ContractLineItem^{*}

Represents a product covered by a service contract (customer support agreement). This object is available in API version 18.0 and later.

DigitalSignature

Represents a signature captured on a service report in field service.

Entitlement[®]

Represents the customer support an account or contact is eligible to receive. This object is available in API version 18.0 and later. Entitlements may be based on an asset, product, or service contract.

EntityMilestone*

Represents a required step in a customer support process on a work order. The Salesforce user interface uses the term "object milestone. This object is available in API version 37.0 and later.

Expense

Represents an expense linked to a work order. Service resource technicians can log expenses, such as tools or travel costs. This object is available in API version 49.0 and later.

ExpenseReport

Represents a report that summarizes expenses. This object is available in API version 50.0 and later.

ExpenseReportEntry

Represents an entry in an expense report. This object is available in API version 50.0 and later.

FieldServiceMobileSettings

Represents a configuration of settings that control the Field Service iOS and Android mobile app experience. This object is available in API version 38.0 and later.

LinkedArticle

Represents a knowledge article that is attached to a work order, work order line item, or work type. This object is available in API version 37.0 and later.

Location

Represents a warehouse, service vehicle, work site, or other element of the region where your team performs field service work. In API version 49.0 and later, you can associate activities with specific locations. Activities, such as the tasks and events related to a location, appear in the activities timeline when you view the location detail page. Also in API version 49.0 and later, Work.com users can view Employees as a related list on Location records. In API version 51.0 and later, this object is available for Omnichannel Inventory and represents physical locations where inventory is available for fulfilling orders.

MaintenanceAsset

Represents an asset covered by a maintenance plan in field service. Assets can be associated with multiple maintenance plans.

MaintenancePlan

Represents a preventive maintenance schedule for one or more assets in field service.

MaintenanceWorkRule

Represents the recurrence pattern for a maintenance record. This object is available in API version 49.0 and later.

MobileSettingsAssignment

Represents the assignment of a particular field service mobile settings configuration to a user profile. This object is available in API version 41.0 and later.

OperatingHours

Represents the hours in which a service territory, service resource, or account is available for work in Field Service, Salesforce Scheduler, or Workforce Engagement. This object is available in API version 38.0 and later.

OperatingHoursHoliday

Represents the day or hours for which a service territory or service resource is unavailable in Field Service. This object is available in API version 54.0 and later.

Pricebook2*

Represents a price book that contains the list of products that your org sells.

Product2*

Represents a product that your company sells.

ProductConsumed

Represents an item from your inventory that was used to complete a work order or work order line item in field service.

ProductItem

Represents the stock of a particular product at a particular location in field service, such as all bolts stored in your main warehouse.

ProductItemTransaction

Represents an action taken on a product item in field service. Product item transactions are auto-generated records that help you track when a product item is replenished, consumed, or adjusted.

ProductRequest

Represents an order for a part or parts in field service.

ProductRequestLineItem

Represents a request for a part in field service. Product request line items are components of product requests.

ProductRequired

Represents a product that is needed to complete a work order or work order line item in field service.

ProductServiceCampaign

Represents a set of activities to be performed on a product service campaign asset, such as a product recall for safety issues or product defects. This object is available in API version 51.0 and later.

ProductServiceCampaignItem

Represents a product service campaign's asset. This object is available in API version 51.0 and later.

ProductServiceCampaignItemStatus

Represents a status for a product service campaign item in field service. This object is available in API version 51.0 and later.

ProductServiceCampaignStatus

Represents a status for a product service campaign in field service. This object is available in API version 51.0 and later.

ProductTransfer

Represents the transfer of inventory between locations in field service.

ProductWarrantyTerm

Defines the relationship between a product or product family and warranty term. This object is available in API version 50.0 and later.

RecordsetFilterCriteria

Represents a set of filters that can be used to match service appointments or assets based on your criteria fields. For example, you can create recordset filter criteria so that only service appointments that satisfy the filter criteria are matched to the filtered shifts, and likewise only maintenance work rules that satisfy your criteria are matched to assets. This object is available in API version 50.0 and later. Assets and maintenance work rules are available in API version 52.0 and later.

RecordsetFilterCriteriaRule

Represents a rule using fields from the designated source object to create filters on the filtered, or target, object.

RecordsetFilterCriteriaRule is associated with the RecordsetFilterCriteria object. This object is available in API version 50.0 and later.

ResourceAbsence

Represents a time period in which a service resource is unavailable to work in Field Service, Salesforce Scheduler, or Workforce Engagement. This object is available in API version 38.0 and later.

ResourcePreference

Represents an account's preference for a specified service resource on field service work.

ReturnOrder

Represents the return or repair of inventory or products in Field Service, or the return of order products in Order Management. This object is available in API version 42.0 and later.

ReturnOrderLineItem

Represents a specific product that is returned or repaired as part of a return order in Field service, or a specific order item that is returned as part of a return order in Order Management. This object is available in API version 42.0 and later.

ServiceAppointment

Represents an appointment to complete work for a customer in Field Service and Lightning Scheduler. This object is available in API version 38.0 and later.

ServiceAppointmentStatus

Represents a possible status of a service appointment in field service.

ServiceContract*

Represents a customer support contract (business agreement). This object is available in API version 18.0 and later.

ServiceCrew

Represents a group of service resources who can be assigned to service appointments as a unit.

ServiceCrewMember

Represents a technician service resource that belongs to a service crew.

ServiceReport

Represents a report that summarizes a work order, work order line item, or service appointment.

ServiceReportLayout

Represents a service report template in field service.

ServiceResource

Represents a service technician or service crew in Field Service and Salesforce Scheduler, or an agent in Workforce Engagement. This object is available in API version 38.0 and later.

ServiceResourceCapacity

Represents the maximum number of scheduled hours or number of service appointments that a capacity-based service resource can complete within a specific time period. This object is available in API version 38.0 and later.

ServiceResourceSkill

Represents a skill that a service resource possesses in Field Service and Lightning Scheduler. This object is available in API version 38.0 and later.

ServiceTerritory

Represents a geographic or functional region in which work can be performed in Field Service, Salesforce Scheduler, or Workforce Engagement. This object is available in API version 38.0 and later.

ServiceTerritoryLocation

Represents a location associated with a particular service territory in field service.

ServiceTerritoryMember

Represents a service resource who can be assigned in a service territory in Field Service, Salesforce Scheduler, or Workforce Engagement. This object is available in API version 38.0 and later.

Shift

Represents a shift for service resource scheduling. Available in API versions 46.0 and later.

ShiftPattern

Represents a pattern of templates for creating shifts. This object is available in API version 51.0 and later.

ShiftPatternEntry

ShiftPatternEntry links a shift template to a shift pattern. This object is available in API version 51.0 and later.

ShiftTemplate

Represents a template for creating shifts. This object is available in API version 51.0 and later.

Shipment

Represents the transport of inventory in field service or a shipment of order items in Order Management.

Skill*

Represents a category or group of Chat users or service resources in Field Service or Workforce Engagement. This object is available in API version 24.0 and later.

SkillRequirement

Represents a skill that is required to complete a particular task in Field Service, Salesforce Scheduler, or Workforce Engagement. Skill requirements can be added to work types, work orders, and work order line items in Field Service and Lightning Scheduler, or to job profiles in Workforce Engagement. This object is available in API version 38.0 and later. You also can add skill requirements to work items in Omni-Channel skills-based routing using API version 42.0 and later.

TimeSheet

Represents a schedule of a service resource's time in Field Service or Workforce Engagement. This object is available in API v47.0 and later.

TimeSheetEntry

Represents a span of time that a service resource spends on a field service task. This object is available in API version 47.0 and later.

TimeSlot

Represents a period of time on a specified day of the week during which work can be performed in Field Service, Salesforce Scheduler, or Workforce Engagement. Operating hours consist of one or more time slots. This object is available in API version 38.0 and later.

WarrantyTerm

Represents warranty terms defining the labor, parts, and expenses covered, along with any exchange options, provided to rectify issues with products. This object is available in API version 50.0 and later.

WorkOrder*

Represents field service work to be performed for a customer. This object is available in API version 36.0 and later.

WorkOrderLineItem*

Represents a subtask on a work order in field service. This object is available in API version 36.0 and later.

WorkOrderLineItemStatus

Represents a possible status of a work order line item in field service.

WorkPlan

Represents a work plan for a work order or work order line item. This object is available in API version 52.0 and later.

WorkPlanSelectionRule

Represents a rule that selects a work plan for a work order or work order line item. This object is available in API version 52.0 and later.

WorkPlanTemplate

Represents a template for a work plan. This object is available in API version 52.0 and later.

WorkPlanTemplateEntry

Represents an object that associates a work step template with a work plan template. This object is available in API version 52.0 and later.

WorkOrderStatus

Represents a possible status of a work order in field service.

WorkStep

Represents a work step in a work plan. This object is available in API version 52.0 and later.

WorkStepStatus

Represents a picklist for a status category on a work step. This object is available in API version 52.0 and later.

WorkStepTemplate

Represents a template for a work step. This object is available in API version 52.0 and later.

WorkType

Represents a type of work to be performed in Field Service and Lightning Scheduler. Work types are templates that can be applied to work order or work order line items. This object is available in API version 38.0 and later.

WorkTypeGroup

Represents a grouping of work types used to categorize types of appointments available in Lightning Scheduler, or to define scheduling limits in Field Service. This object is available in API version 45.0 and later.

WorkTypeGroupMember

Represents the relationship between a work type and the work type group it belongs to. This object is available in API version 45.0 and later.

Address

Represents a mailing, billing, or home address.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

The following access checks must be enabled:

- Industries Insurance
- Retail Execution
- IndustriesVisit
- Field Service
- Order Management
 - Perms: FulfillmentOrder, OrderSummary, AdvancedOrderManagement, OrderCCS
 - Prefs: OrdersEnabled, EnhancedCommerceOrders
- Public Sector
- Employee Experience
- Contact Tracing For Employees

Fields

Field Name	Details
Address	Туре
	address
	Properties
	Filter, Nillable
	Description The full address.
AddressType	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description Picklist of address types. The values are:
	 Mailing
	 Shipping
	 Billing
	• Home
City	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The address city.
Country	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The address country.
Description	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description A brief description of the address.

Details
Туре
string
Properties
Create, Filter, Nillable, Sort, Update
Description
Directions to the address.
Туре
picklist
Properties
Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
Description
The level of accuracy of a location's geographical coordinates compared with its
physical address. A geocoding service typically provides this value based on the
address's latitude and longitude coordinates.
Туре
double
Properties
Create, Filter, Nillable, Sort, Update
Description
Used with Longitude to specify the precise geolocation of the address.
Acceptable values are numbers between –90 and 90 with up to 15 decimal
places.
Туре
picklist
Properties
Create, Defaulted on create, Filter, Filter, Group, Sort, Update
Description
Picklist of location types. The available values are:
Warehouse (default)
• Site
• Van
• Plant
Туре
double
Properties

Field Name	Details		
	Description Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.		
Name	Type string		
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort		
	Description Name of the address.		
ParentId	Type reference		
	Properties Create, Filter, Group, Sort		
	Description A lookup field to the parent location.		
	This is a relationship field.		
	Relationship Name Parent		
	Relationship Type Lookup		
	Refers To Location		
PostalCode	Type string		
	Properties Create, Filter, Group, Nillable, Sort, Update		
	Description The address postal code.		
State	Type string		
	Properties Create, Filter, Group, Nillable, Sort, Update		
	Description The address state.		

Field Name	Details		
Street	Type textarea		
	Properties Create, Filter, Group, Nillable, Sort, Update		
	Description The address street.		
TimeZone	Type picklist		
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update		
	Description Picklist of available time zones.		

Usage



(1) Important: "Address" in Salesforce can also refer to the Address compound field found on many standard objects. When referencing the Address object in your Apex code, always use Schema. Address instead of Address to prevent confusion with the standard Address compound field. If referencing both the address object and the Address field in the same snippet, you can differentiate between the two by using System. Address for the field and Schema. Address for the object.

ApptBundleAggrDurDnscale

Sums the duration of the bundle members, reduced by a predefined percentage. This object is available in API version 54.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

- Field Service must be enabled.
- Bundling must be enabled in the Field Service Settings.
- The Field Service Admin, Field Service Bundle for Dispatcher, and Field Service Integration permission sets must be enabled.

Fields

Field	Details
BundleAggregationPolicyId	Type reference

Field	Details
	Properties Create, Filter, Group, Sort
	Description The ID of the parent appointment bundle aggregation policy.
	This is a relationship field.
	Relationship Name BundleAggregationPolicy
	Relationship Type Lookup
	Refers To ApptBundleAggrPolicy
FromBundleMemberNumber	Type int
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The number of the first bundle member to which the downscale is applied.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
MaxReduction	Туре
	int Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	The maximum reduction that can be applied to a bundle member.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the appointment bundle aggregation downscale policy.
PercentageOfReduction	Туре
	int
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The percentage of duration reduction.
ToBundleMemberNumber	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The number of the last bundle member to which the downscale is applied.

ApptBundleAggrPolicy

Policy that defines how the property values of the bundle members are aggregated and assigned to the bundle. This object is available in API version 54.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

- Field Service must be enabled.
- Bundling must be enabled in the Field Service Settings.
- The Field Service Admin, Field Service Bundle for Dispatcher, and Field Service Integration permission sets must be enabled.

Fields

Field	Details
AggregationAction	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The aggregation action to be performed.
	Possible values are: All default and custom Service Appointment fields.
AggregationFieldType	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The target field type in the bundle to which the aggregation is directed.
	Possible values are:
	• Boolean
	• Date
	• Numeric
	• Picklist
	• Picklist-Multi
	• Skills
	• String
AggregationOrder	Туре
	int
	Properties
	Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	The order the aggregation is triggered.
BundleFieldName	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Name of the target field in the bundle where the value is taken from the bundle member.
	Possible values are: All default and custom Service Appointment fields.

Field	Details
BundleMemberAddiFieldName	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Name of an additional source field that is connected to the initial source field in the bundle member from which the value is taken.
	Possible values are: All default and custom Service Appointment fields.
BundleMemberFieldName	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Name of the source field in the bundle member from which the value is taken.
	Possible values are: All default and custom Service Appointment fields.
BundlePolicyId	Type reference
	Properties Create, Filter, Group, Sort
	Description ID of the parent bundle policy.
	This is a relationship field.
	Relationship Name BundlePolicy
	Relationship Type Lookup
	Refers To ApptBundlePolicy
ConstantValue	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The constant value that is used in the aggregation.
DateValue	Type picklist

Field Details

Properties

Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Description

Represents how the date value will be determined.

Possible values are:

- End of Day
- Now
- Null
- Start of Day

DoesAllowDuplicateStrings

Type

boolean

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

Indicates if you want to allow the same string to appear more than once when using the 'Sum based on Bundle Members' action type.

DownscaleSortDirection

Type

picklist

Properties

Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Description

Applies only if the Set Downscaled Duration action is set. The downscaling sorting direction of the bundle member service appointments, according to their duration.

Possible values are:

- Ascending
- Descending

FilterCriteriaId

Type

reference

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

The active recordset filter criteria used for aggregating the bundle members.

This is a relationship field.

Relationship Name

FilterCriteria

Relationship Type

Lookup

Field	Details
	Refers To RecordsetFilterCriteria
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
MaxBundleDuration	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The maximum bundle duration that can be accumulated from the bundle members (after downscaling).
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description The name of the appointment bundle aggregation policy.
ShouldUpdateOnCreationOnly	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if you want to update the field in the bundle only when it is created.

ApptBundleConfig

Represents the general parameters that define the behavior of the bundle. This object is available in API version 54.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

- Field Service must be enabled.
- Bundling must be enabled in the Field Service Settings.
- The Field Service Admin, Field Service Bundle for Dispatcher, and Field Service Integration permission sets must be enabled.

Fields

Field	Details
AddToBundleStatuses	Type multipicklist
	Properties Create, Defaulted on create, Filter, Nillable, Update
	Description The statuses of service appointment that are allowed to be bundled.
	Possible values are:
	• Accepted
	• Canceled
	• Cannot Complete
	• Completed
	• Dispatched
	• In Progress
	• None
	• Rejected
	• Scheduled
	The default value is 'None'.
BundleStatusesToPropagate	Type multipicklist
	Properties Create, Defaulted on create, Filter, Nillable, Update
	Description The bundle statuses that when updated are inherited by the bundle members.
	Possible values are:

Field	Details
	• Accepted
	• Canceled
	• Cannot Complete
	• Completed
	• Dispatched
	• In Progress
	• None
	• Rejected
	• Scheduled
	The default value is 'None'.
CriteriaForAutoUnbundlingId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The criteria that causes a bundle service appointment to be unbundled.
	This is a relationship field.
	Relationship Name
	CriteriaForAutoUnbundling
	Relationship Type Lookup
	Refers To
	RecordsetFilterCriteria
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.

Field	Details
MemberStatusesNotToPropagate	Туре
	multipicklist
	Properties
	Create, Defaulted on create, Filter, Nillable, Update
	Description The bundle member statuses that are not overridden when the bundle's status is updated.
	Possible values are:
	Accepted
	• Canceled
	• Cannot Complete
	• Completed
	• Dispatched
	• In Progress
	• None
	• Rejected
	• Scheduled
	The default value is 'None'.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the Appointment Bundle Config.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description ID of the owner of this object.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To
	Group, User

Field Details

RemoveFromBundleStatuses

Type

multipicklist

Properties

Create, Defaulted on create, Filter, Nillable, Update

Description

The statuses of service appointments that are allowed to be removed from a bundle.

Possible values are:

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

The default value is 'None'.

StatusOnRemovalFromBundle

Type

picklist

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

The status that a service appointment is given when it is removed from a bundle.

Possible values are:

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

The default value is 'None'.

StatusesNotToUpdateOnUnbundle

Type

multipicklist

Field	Details
	Properties Create, Defaulted on create, Filter, Nillable, Update
	Description The statuses that shouldn't be updated when a bundle is unbundled.
	Possible values are:
	• Accepted
	• Canceled
	• Cannot Complete
	• Completed
	• Dispatched
	• In Progress
	• None
	• Rejected
	• Scheduled
	The default value is 'None'.

ApptBundlePolicy

Policy that defines how the bundling of service appointments should be handled. This object is available in API version 54.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

- Field Service must be enabled.
- Bundling must be enabled in the Field Service Settings.
- The Field Service Admin, Field Service Bundle for Dispatcher, and Field Service Integration permission sets must be enabled.

Field	Details
BundleEndTimeFieldName	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description This field is reserved for future use.

Field	Details
BundleStartTimeFieldName	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description This field is reserved for future use.
CanAllowSchleDepndInBundle	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description This field is reserved for future use.
ConstantTimeValue	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description This field is reserved for future use.
FilterCriteriaId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The active recordset filter criteria used for the bundle members. Only service appointments that meet the criteria can be bundled.
	This is a relationship field.
	Relationship Name FilterCriteria
	Relationship Type Lookup
	Refers To RecordsetFilterCriteria
IsAutomaticBundling	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates if the policy is relevant for automatic bundling.
IsManualBundling	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if the policy is relevant for manual bundling.
	The default value is 'false'.
IsTimeCalcByBundleDurationFld	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description This field is reserved for future use.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
LimitAmountOfBundleMembers	Type int
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The maximum number of bundle members that can be included in a bundle.

Field	Details
LimitDurationOfBundle	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The maximum duration of a bundle.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	Name of the bundle policy.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	ID of the owner of this object.
	This is a polymorphic relationship field.
	Relationship Name
	Owner
	Relationship Type
	Lookup
	Refers To
	Group, User
Priority	Туре
	int
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The priority level that this bundle policy should be given when the bundle policies are
	analyzed using the automatic mode.

ApptBundlePolicySvcTerr

Represents a link between the BundlePolicy and the ServiceTerritory. This object is available in API version 54.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

- Field Service must be enabled.
- Bundling must be enabled in the Field Service Settings.
- The Field Service Admin, Field Service Bundle for Dispatcher, and Field Service Integration permission sets must be enabled.

Field	Details
BundlePolicyId	Type reference
	Properties Create, Filter, Group, Sort
	Description The ID of the parent bundle policy.
	This is a relationship field.
	Relationship Name BundlePolicy
	Relationship Type Lookup
	Refers To ApptBundlePolicy
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.

Field	Details
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the appointment bundle service territory.
ServiceTerritoryId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the service territory.
	This is a relationship field.
	Relationship Name
	ServiceTerritory
	Relationship Type
	Lookup
	Refers To
	ServiceTerritory

ApptBundlePropagatePolicy

Policy that defines which property values are inherited from the bundle to the bundle members or are assigned as constant values in the bundle members. This object is available in API version 55.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

- Field Service must be enabled.
- Bundling must be enabled in the Field Service Settings.
- The Field Service Admin, Field Service Bundle for Dispatcher, and Field Service Integration permission sets must be enabled.

Field	Details
AdditionalConstantValue	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The additional constant value that is connected to the initial constant value to be added to the bundle members.
BundleFieldName	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Name of the source field in the bundle from which the value is taken.
	Possible values are: All default and custom Service Appointment fields.
BundleMemberFieldName	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Name of the target field in the bundle member where the value is inherited from the bundle.
	Possible values are: All default and custom Service Appointment fields.
BundlePolicyId	Type reference
	Properties Create, Filter, Group, Sort
	Description
	ID of the parent bundle policy.
	This field is a relationship field.
	Relationship Name BundlePolicy
	Relationship Type Lookup
	Refers To ApptBundlePolicy

Field	Details
ConstantValue	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The constant value to be added to the bundle members.
DateValue	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Represents how the date value is determined.
	Possible values are:
	• End of Day
	• Now
	• Null
	Start of Day
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Name	Туре
	string
	Properties Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the appointment bundle propagation policy.
ShouldAddConstantValue	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if you want to enable adding a constant value to the bundle members.
ShouldUpdateOnAdd	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if you want to enable updating the fields of the bundle members when they are added to the bundle.
ShouldUpdateOnRemove	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if you want to enable updating the fields of the bundle members when they are removed from the bundle.
ShouldUpdateOnUnbundle	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if you want to enable updating the fields of the bundle members when performing the Unbundle action.

Appt Bundle Restrict Policy

Policy that defines the restrictions that are considered while forming a bundle. This object is available in API version 54.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

- Field Service must be enabled.
- Bundling must be enabled in the Field Service Settings.
- The Field Service Admin, Field Service Bundle for Dispatcher, and Field Service Integration permission sets must be enabled.

Field	Details
BundlePolicyId	Type reference
	Properties Create, Filter, Group, Sort
	Description ID of the parent bundle policy.
	This is a relationship field.
	Relationship Name BundlePolicy
	Relationship Type Lookup
	Refers To ApptBundlePolicy
DoesAllowEmpty	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Allows a bundle member service appointment with an empty Restriction Field Name to be bundled.
DoesRestrictAutomaticMode	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if you want to apply this restriction when using the automatic mode.
DoesRestrictManualMode	Туре
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates if you want to apply this restriction when using the manual mode.
IsRestrictByDateOnly	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if you want the bundle to be restricted according to the calendar date only, ignoring the time of day.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description The name of the appointment bundle restriction policy.
RestrictionFieldName	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Name of the field in the service appointment used for applying the restriction.
	Possible values are: All default and custom Service Appointment fields.

ApptBundleSortPolicy

Policy that defines the properties by which the bundle members are sorted within the bundle. Can also be used in the automatic mode for determining the order of the automatic selection of bundle members. This object is available in API version 54.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

- Field Service must be enabled.
- Bundling must be enabled in the Field Service Settings.
- The Field Service Admin, Field Service Bundle for Dispatcher, and Field Service Integration permission sets must be enabled.

Field	Details
BundlePolicyId	Type reference
	Properties Create, Filter, Group, Sort
	Description The ID of the parent bundle policy.
	This is a relationship field.
	Relationship Name BundlePolicy
	Relationship Type Lookup
	Refers To ApptBundlePolicy
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Name of the appointment bundle sort policy.
SortDirection	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	Description The order of the appointments in a bundle
	Possible values are:
	• Ascending
	• Descending
SortFieldName	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Name of the field in the service appointment used for sorting the bundle members.
	Possible values are: All default and custom Service Appointment fields.
SortOrder	Type int
	Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update
	Description The order of fields used for sorting the bundle members.
SortType	Type picklist

Field	Details
	Properties Create Filter Crown Postricted mighlight Cost Undete
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description The applied sort type for arranging the bundle. Sort for Automatic Bundling defines the order that automated bundling uses to examine the candidate service appointments to be bundled. Sort Within a Bundle defines the order of bundle members. It's also used when you unbundle to define the order that the service appointments are scheduled on the Gantt.
	Possible values are:
	 SortForAutomaticBundling—Sort For Automatic Bundling
	 SortWithinaBundle—Sort Within a Bundle

AppExtension

Represents a connection between the Field Service mobile app and another app, typically for passing record data to the Salesforce mobile app or other apps. This object is available in API version 41.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), query(), retrieve(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
AppExtensionLabel	Type string
	Properties Create, Filter, Group, Sort, Update
	Description
	The label in the UI for the app extension.
AppExtensionName	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description The API name of the app extension.

Field Name	Details
FieldServiceMobileSettingsId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The ID of a set of field service mobile settings.
InstallationUrl	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The URL that takes the user to the app install location, such as the App Store or Google Play.
LaunchValue	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	A value directing the Field Service app to the appropriate app extension. The Launch Value can be a static URL or a dynamic value that you can represent with certain tokens. These tokens pass field information from the record that the user is currently viewing. The basic format for these tokens is based on the field names; for example: {!\$Name} .
ScopedToObjectTypes	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Indicates the types of records from which the app extension can be activated. Scoping an app extension to an object lets users activate the app extension from records of the specified type. For example, to scope to both work orders and service appointments you would use the value WorkOrder, ServiceAppointment.
Туре	Туре
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update

Field Name	Details
	Description A picklist of types of app extensions: iOS, Android, Flow, and Lightning Apps

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

${\bf App Extension Change Event}$

Change events are available for the object. Available in API version 55.0 and later.

Asset

Represents an item of commercial value, such as a product sold by your company or a competitor, that a customer has purchased.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
AccountId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description (Required) ID of the Account associated with this asset. Must be a valid account ID. Required if ContactId isn't specified.
	This field is a relationship field.
	Relationship Name Account
	Relationship Type Lookup
	Refers To Account
AssetLevel	Type int
	Properties Filter, Group, Nillable, Sort

Field Details

Description

The asset's position in an asset hierarchy. If the asset has no parent or child assets, its level is 1. Assets that belong to a hierarchy have a level of 1 for the root asset, 2 for the child assets of the root asset, 3 for their children, and so forth.



Note: On assets created before the introduction of this field, the asset level defaults to –1. After the asset record is updated, the asset level is calculated and automatically updated.

AssetProvidedById

Type

reference

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

The account that provided the asset, typically a manufacturer.

This field is a relationship field.

Relationship Name

AssetProvidedBy

Relationship Type

Lookup

Refers To

Account

AssetServicedById

Type

reference

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

The account in charge of servicing the asset.

This field is a relationship field.

Relationship Name

AssetServicedBy

Relationship Type

Lookup

Refers To

Account

Availability

Type

percent

Properties

Filter, Nillable, Sort

Field	Details
	Description
	The percentage of expected uptime where the asset was available for use.
AverageUptimePerDay	Туре
	double
	Properties Create, Filter, Nillable, Sort, Update
	Description The average number of hours per day the asset is expected to be available for use.
ConsequenceOfFailure	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The business impact associated with the asset's failure. Using this field, you can address the asset's health and take action using Flows. To enable this field, use Object Manager to update the field availability. Make sure that the field is visible for field-level security and for page layout. To learn more, see What Determines Field Access. The picklist values aren't predefined in orgs created before Winter '22 that aren't Field Service enabled. This field is available in API version 53.0 and later.
	Possible values are:
	• Insignificant
	• Minor
	• Moderate
	• Major
	• Critical
ContactId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Required if AccountId isn't specified. ID of the Contact associated with this asset. Must be a valid contact ID that has an account parent (but doesn't need to match the asset's AccountId).
	This field is a relationship field.
	Relationship Name Contact
	Relationship Type Lookup

Field	Details
	Refers To Contact
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Three-letter ISO 4217 currency code associated with the invoice. The default value is USD.
	This field is available in API version 55.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.
CurrentAmount	Type
	Currency Properties Filter, Nillable, Sort
	Description Reserved for future use.
	This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.
CurrentLifecycleEndDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description Represents the end of the period shown as current. System-populated field inherited from the end date of the current asset state period. If that field is empty, as with an evergreen subscription, the Current Lifecycle End Date field is also empty.
	This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.
CurrentMrr	Type currency
	Properties Filter, Nillable, Sort
	Description The asset's monthly recurring revenue during the current asset state period. System-populated field inherited from the monthly recurring revenue on the current asset state period. If no asset state period is current, the value is 0. Label is Current Monthly Recurring Revenue.
	This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.

Field	Details
CurrentQuantity	Туре
	double
	Properties Filter, Nillable, Sort
	Description The asset's quantity during the current asset state period. System-populated field inherited from the quantity on the current asset state period. If no asset state period is current, the value is 0.
	This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.
Description	Type textarea
	Properties
	Create, Nillable, Update
	Description
	Description of the asset.
DigitalAssetStatus	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description Status of digital tracking of the asset. The default picklist includes the following values:
	• On
	• Off
	• Warning
	• Error
ExternalIdentifier	Type
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the matching record in an external system. This field is available in API version 49.0 and later.
HasLifecycleManagement	Туре
	boolean
	Properties Defaulted on create, Filter, Group, Sort

Field	Details
	Description True if this asset is a lifecycle-managed asset, otherwise false. You can't switch an asset to a lifecycle-managed asset or the reverse. This field is system populated.
	The default value is false.
	This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.
InstallDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Date when the asset was installed.
IsCompetitorProduct	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether this Asset represents a product sold by a competitor (true) or not (false). Default value is false. Its UI label is Competitor Asset.
IsInternal	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates that the asset is produced or used internally (true) or not (false). Default value is false. Its UI label is Internal Asset.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date and time that the asset was last modified. Its UI label is Last Modified Date.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort

Field	Details
	Description The date and time that the asset was last viewed.
LifecycleEndDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description Represents the end of the asset's lifecycle. System-populated field inherited from the end date of the final asset state period. If that field is empty, as with an evergreen subscription, the lifecycle has no end date. This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.
LifecycleStartDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description Represents the beginning of the asset's lifecycle. System-populated field inherited from the start date of the earliest asset state period. This field can't be edited. When a new asset action affects the start date of an asset state period, the period is deleted and a new one is generated. This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.
LocationId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The asset's location. Typically, this location is the place where the asset is stored, such as a warehouse or van.
ManufactureDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The date when the asset was manufactured. This field is available from API version 49.0 and later.
Name	Type string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description (Required) Name of the asset. Label is Asset Name.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The asset's owner. By default, the asset owner is the user who created the asset record. Its UI label is Asset Owner.
	This field is a relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To User
ParentId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The asset's parent asset. Its UI label is Parent Asset.
	This field is a relationship field.
	Relationship Name Parent
	Relationship Type Lookup
	Refers To Asset
Price	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Price paid for this asset.

Field	Details
Product2Id	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description (Optional) ID of the Product2 associated with this asset. Must be a valid Product2 ID. Its Ulabel is Product.
	This field is a relationship field.
	Relationship Name Product2
	Relationship Type Lookup
	Refers To Product2
ProductCode	Type string
	Properties
	Filter, Group, Nillable, Sort
	Description The product code of the related product.
ProductDescription	Type string
	Properties
	Filter, Sort, Nillable
	Description The product description of the related product.
ProductFamily	Type picklist
	Properties Filter, Group, Sort, Nillable
	Description The product family of the related product.
PurchaseDate	Туре
	date
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Date on which this asset was purchased.
Quantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Quantity purchased or installed.
	Note: The Quantity field value isn't set by Customer Asset Lifecycle Management. Instead, you can populate the field as you need.
Reliability	Type percent
	Properties Filter, Nillable, Sort
	Description The percentage of expected uptime where the asset wasn't subject to unplanned downtime.
RenewalPricingType	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The price used when renewing a subscription. This field is available in API version 55.0 and later. This field is available when Subscription Management is enabled.
	Possible values are:
	Last Negotiated Price
	• List Price
RenewalTerm	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description With Renewal Term Unit, defines the default subscription term for renewal quotes. This field is available in API version 55.0 and later. This field is available when Subscription Management is enabled.
RenewalTermUnit	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The unit of time for a subscription term. This field is available in API version 55.0 and later. This field is available when Subscription Management is enabled.
	Possible values are:
	• Months
RootAssetId	Type reference
	Properties
	Filter, Group, Nillable, Sort
	Description (Read only) The top-level asset in an asset hierarchy. Depending on where an asset lies in the hierarchy, its root could be the same as its parent. Its UI label is Root Asset.
	This field is a relationship field.
	Relationship Name RootAsset
	Relationship Type Lookup
	Refers To Asset
SerialNumber	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Serial number for this asset.
Status	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Customizable picklist of values. The default picklist includes the following values:
	• Purchased
	• Shipped
	• Installed
	• Registered

Field	Details	
	• Obsolete	
StatusReason	Туре	
	picklist	
	Properties	
	Create, Filter, Group, Nillable, Sort, Update	
	Description The explanation of the device status. This field is available from API version 49.0 and later.	
	Possible values are:	
	• Not Ready	
	• Off	
	• Offline	
	• Online	
	• Paused	
	• Standby	
StockKeepingUnit	Type string	
	Properties	
	Filter, Group, Nillable, Sort	
	Description The SKU assigned to the related product.	
SumDowntime	Type double	
	Properties Filter, Nillable, Sort	
	Description Accumulated downtime (planned and unplanned), determined as follows:	
	 When only UptimeRecordStart is set, the sum of all downtime from UptimeRecordStart 	
	 When UptimeRecordStart and UptimeRecordEnd are set, the sum of all downtime from UptimeRecordStart to UptimeRecordEnd 	
	Otherwise, downtime isn't accumulated.	
SumUnplannedDowntime	Type double	
	Properties Filter, Nillable, Sort	
	Description Accumulated unplanned downtime, determined as follows:	

Field	Details
	 When only UptimeRecordStart is set, the sum of all unplanned downtime from UptimeRecordStart
	 When UptimeRecordStart and UptimeRecordEnd are set, the sum of all unplanned downtime from UptimeRecordStart to UptimeRecordEnd
	Otherwise, unplanned downtime isn't accumulated.
TotalLifecycleAmount	Type currency
	Properties Filter, Nillable, Sort
	Description The total amount of revenue for the asset, including revenue from each stage in the asset lifecycle. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.
UptimeRecordEnd	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	$\label{lem:Description} \textbf{Description} \\ \textbf{The date until which SumDowntime and SumUnplannedDowntime are accumulated.}$
UptimeRecordStart	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	$\label{lem:decomposition} \textbf{Description} \\ \textbf{The date from which SumDowntime and SumUnplannedDowntime are accumulated.}$
UsageEndDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Date when usage for this asset ends or expires.
Uuid	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unique ID for the asset. This field is available in API version 49.0 and later.

Usage

Use this object to track products sold to customers. With asset tracking, a client application can quickly determine which products were previously sold or are currently installed at a specific account. You can also create hierarchies of up to 10,000 assets.

For example, suppose that your company wants to renew and upsell opportunities on products sold in the past. Similarly, your company can track competitive products in a customer environment where products can be replaced or swapped out.

Asset tracking is also useful for product support, providing detailed information to assist with product-specific support issues. For example, the PurchaseDate or SerialNumber can indicate whether a given product has certain maintenance requirements, including product recalls. Similarly, the UsageEndDate can indicate when the asset was removed from service or when a license or warranty expires.

If an application creates an Asset record, it must specify a Name and either an AccountId, ContactId, or both.

Associated Objects

This object has the following associated objects. If the API version isn't specified, those objects are available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

AssetChangeEvent (API version 44.0)

Change events are available for the object.

AssetFeed

Feed tracking is available for the object.

AssetHistory

History is available for tracked fields of the object.

As set Owner Sharing Rule

Sharing rules are available for the object.

AssetShare

Sharing is available for the object.

AssetDowntimePeriod

Represents a period during which an asset is not able to perform as expected. Downtime periods include planned activities, such as maintenance, and unplanned events, such as mechanical breakdown. This object is available in API version 49.0 and later.

Supported Calls

create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),undelete(),update(),upsert()

Field	Details
AssetDowntimePeriodNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description The unique number of this asset downtime period record.
AssetId	Type reference
	Properties Create, Filter, Group, Sort
	Description The ID of the asset this asset downtime period record is for.
Description	Type textarea
	Properties Create, Nillable, Update
	Description The description of this asset downtime period.
DowntimeType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The type of this asset downtime period. Possible values are:
	PlannedUnplanned
EndTime	Type dateTime
	Properties Create, Filter, Sort, Update
	Description The time this asset downtime period ended.
IsExcluded	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Whether this asset downtime period is excluded from the calculation of accumulated downtime and accumulated unplanned downtime, and therefore not included in availability and reliability calculations.

Field	Details
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
StartTime	Type dateTime
	Properties Create, Filter, Sort, Update
	Description The time this asset downtime period started.

AssetRelationship

Represents a non-hierarchical relationship between assets due to replacement, upgrade, or other circumstances.

Asset relationships appear in the Primary Assets and Related Assets related lists on asset records in the Ul.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Details	
Туре	
reference	
Properties	
Create, Filter, Group, Sort	
Description	
The replacement asset.	
	Type reference Properties Create, Filter, Group, Sort Description

Field Name	Details
	This is a relationship field.
	Relationship Name
	Asset
	Relationship Type
	Lookup
	Refers To Asset
AssetRelationshipNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated number identifying the asset relationship.
FromDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The day the replacement asset is installed.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the asset relationship was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description
	The date the asset relationship was last viewed.
RelatedAssetId	Туре
	reference
	Properties
	Create, Filter, Group, Sort, Update

Field Name	Details
	Description The asset being replaced.
	This is a relationship field.
	Relationship Name RelatedAsset
	Relationship Type Lookup
	Refers To Asset
RelationshipType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The type of relationship between the assets. This field comes with three values—Replacement, Upgrade, and Crossgrade—but you can create more in Setup.
ToDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The day the replacement asset is uninstalled.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

AssetRelationshipFeed

Feed tracking is available for the object.

As set Relationship History

History is available for tracked fields of the object.

AssetWarranty

Defines the warranty terms applicable to an asset along with any exclusions and extensions. This object is available in API version 50.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
AssetId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The ID of the asset this warranty term applies to.
AssetWarrantyNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The identifier of the asset warranty record.
EndDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date on which this warranty term expires.
ExchangeType	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The type of exchange offered by this warranty term.
Exclusions	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	Description of any exclusions.
ExpensesCovered	Туре
	percent
	Properties
	Create, Filter, Nillable, Sort, Update

Field	Details
	Description The percentage of expenses covered.
ExpensesCoveredEndDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The date on which cover for expenses ends.
IsTransferable	Type boolean
	Properties Control of the Control of
	Create, Defaulted on create, Filter, Group, Sort, Update Description Defines whether the warranty term can be transferred to a new owner.
LaborCovered	Type percent
	Properties Create, Filter, Nillable, Sort, Update
	Description The percentage of labor covered.
LaborCoveredEndDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The date on which cover for labor ends.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the asset warranty term was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort
	Description The date when the asset warranty term was last viewed.
PartsCovered	Type percent
	Properties Create, Filter, Nillable, Sort, Update
	Description The percentage of parts covered.
PartsCoveredEndDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The date on which cover for parts ends.
Pricebook2Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the price book item associated with this asset warranty term.
StartDate	Type date
	Properties Create, Filter, Group, Sort, Update
	Description The date on which cover under this warranty term starts.
WarrantyTermId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the warranty term this asset warranty term extends.
WarrantyType	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The type of the warranty.

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

Asset Warranty Change Event

Change events are available for the object.

AssignedResource

Represents a service resource who is assigned to a service appointment in Field Service and Lightning Scheduler. Assigned resources appear in the Assigned Resources related list on service appointments. This object is available in API version 38.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()

Field Name	Details
ActualTravelTime	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The number of minutes that the service resource needs to travel to the assigned service appointment. You can enter a value with up to two decimal places.
ApptAssistantInfoUrl	Type textarea
	Properties Create, Nillable, Update
	Description The URL that contains the status of the mobile worker approaching the service appointment, the Community URL, and the expiry of the URL. Available in version 51.0 and later.

Field Name	Details
AssignedResourceNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated number identifying the resource assignment.
EstimatedTravelTime	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The estimated number of minutes needed for the service resource to travel to the service appointment they're assigned to. You can enter a value with up to two decimal places.
LocationStatus	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The status of the mobile worker approaching the service appointment. When
	the location status changes to one of these values, a status update containing
	${\tt ApptAssistantInfoUrl}\ is\ sent to\ the\ customer.\ Available\ in\ version\ 51.0$
	and later.
	Possible values are:
	• EnRoute
	• LastMile
IsPrimaryResource	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the service resource is a primary resource or not. The default value is false. Available in API version 47.0 and later.
ServiceAppointmentId	Туре
	reference
	Properties
	Create, Filter, Group, Sort

Field Name	Details
	Description The service appointment that the resource is assigned to.
	This is a relationship field.
	Relationship Name ServiceAppointment
	Relationship Type Lookup
	Refers To ServiceAppointment
ServiceCrewId	Туре
	reference
	Properties
	Create, Update, Filter, Group, Sort, Nillable
	Description The service crew that the resource is assigned to.
	Note: Since service resources can represent crews or individuals, appointments are typically assigned to crews in the following way:
	1. Create a service resource of the Crew type that represent the crew.
	Create an assigned resource on the service appointment and select the crew resource in the ServiceResourceId field.
	As an alternative, you can assign appointments to crew members separately. This lets you track each member's travel time and see a list of the crew members in the Assigned Resources related list. To take this approach, create an assigned resource for each crew member. List the crew member in the ServiceResourceId field and the crew they belong to in the ServiceCrewId field.
ServiceResourceId	Туре
	reference
	Properties
	Create, Update, Filter, Group, Sort
	Description The resource who is assigned to the service appointment.
	This is a relationship field.
	Relationship Name ServiceResource
	Relationship Type Lookup
	Refers To
	ServiceResource

Usage

You can assign multiple service resources to a service appointment. Service resources who are assigned to service appointments cannot be deactivated until they are removed from the appointments.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

AssignedResourceChangeEvent (API version 48.0)

Change events are available for the object.

AssignedResourceFeed

Feed tracking is available for the object.

AssociatedLocation

Represents a link between an account and a location in Field Service. You can associate multiple accounts with one location. For example, a shopping center location may have multiple customer accounts.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
ActiveFrom	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description Date and time the associated location is active.
ActiveTo	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description Date and time the associated location stops being active.

Field Name	Details
AssociatedLocationNumber	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Auto-generated number identifying the associated location.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The date the associated location was last modified.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The date the associated location was last viewed.
LocationId	Type reference Properties Create, Filter, Group, Sort, Update Description The location associated with the address. This is a relationship field. Relationship Name Location Relationship Type Lookup Refers To Location
ParentRecordId	Type reference Properties Create, Filter, Group, Sort Description The account associated with the location.

Field Name	Details
	This is a relationship field.
	Relationship Name ParentRecord
	Relationship Type Lookup
	Refers To Account
Type	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Picklist of address types. The values are:
	Bill To
	• Ship To

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

AssociatedLocationHistory

History is available for tracked fields of the object.

ContractLineItem

Represents a product covered by a service contract (customer support agreement). This object is available in API version 18.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
AssetId	Type reference
	Properties Create, Filter, Nillable, Update
	Description Required. ID of the Asset associated with the contract line item. Must be a valid asset ID.

Field	Details
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	Description of the contract line item.
Discount	Туре
	percent
	Properties
	Create, Filter, Nillable, Update
	Description
	The discount for the product as a percentage.
	When updating, if you specify Discount without specifying TotalPrice, the
	TotalPrice will be adjusted to accommodate the new Discount value, and the UnitPrice will be held constant.
	If you specify both Discount and Quantity, you must also specify either
	TotalPrice or UnitPrice so the system can determine which one to automatically
	adjust.
EndDate	Туре
	date
	Properties
	Create, Filter, Nillable, Update
	Description
	The last day the contract line item is in effect.
LastReferencedDate	Туре
	date
	Properties
	Filter, Nillable, Sort, Update
	Description
	The timestamp when the current user last accessed this record, a record related to this record,
	or a list view.
LastViewedDate	Туре
	date
	Properties
	Filter, Nillable, Sort, Update

Field	Details
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
LineItemNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Update
	Description Automatically-generated number that identifies the contract line item.
ListPrice	Type currency
	Properties Filter, Nillable
	Description
	Corresponds to the UnitPrice on the PricebookEntry that is associated with this line item, which can be in the standard pricebook or a custom pricebook. A client application can use this information to show whether the unit price (or sales price) of the line item differs from the pricebook entry list price.
LocationId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The location associated with the contract line item.
ParentContractLineItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The line item's parent line item, if it has one.
PricebookEntryId	Type reference
	Properties Create, Filter, Update
	Description Required. ID of the associated PricebookEntry.

Field	Details
	Only exists if Product2 is enabled.
Product2Id	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The product related to the contract line item.
Quantity	Type double
	Properties Create, Filter, Update
	Description Number of units of the contract line item (product) included in the associated service contract.
RootContractLineItemId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description (Read only) The top-level line item in a contract line item hierarchy. Depending on where a line item lies in the hierarchy, its root could be the same as its parent.
ServiceContractId	Type reference
	Properties Create, Filter
	Description Required. ID of the ServiceContract associated with the contract line item. Must be a valid asset ID.
StartDate	Type date
	Properties Create Filter Nillable Undate
	Create, Filter, Nillable, Update Description The first day the contract line item is in effect.
Status	Type picklist

Field	Details
	Properties Filter, Nillable
	Description Status of the contract line item.
Subtotal	Туре
	currency
	Properties
	Filter, Nillable
	Description
	Contract line item's sales price multiplied by the Quantity.
TotalPrice	Туре
	currency
	Properties
	Filter, Nillable
	Description This field is available only for backward compatibility. It represents the total price of the ContractLineItem
	If you specify Discount and Quantity, this field or UnitPrice is required.
	This field is nillable, but you can't set both TotalPrice and UnitPrice to null in the same update request. To insert the TotalPrice for a contract line item via the API (given only a unit price and the quantity), calculate this field as the unit price multiplied by the quantity.
UnitPrice	Туре
	currency
	Properties
	Create, Filter, Update
	Description
	The unit price for the contract line item. In the user interface, this field's value is calculated by dividing the total price of the contract line item by the quantity listed for that line item. Label is Sales Price .
	This field or TotalPrice is required. You can't specify both.

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ContractLineItemChangeEvent (API version 44.0)

Change events are available for the object.

ContractLineItemFeed

Feed tracking is available for the object.

ContractLineItemHistory

History is available for tracked fields of the object.

DigitalSignature

Represents a signature captured on a service report in field service.

Supported Calls

create(), delete(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(),
undelete()

Special Access Rules

Field Service must be enabled.

Field Name	Details
DigitalSignatureNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated number identifying the signature.
DocumentBody	Туре
	base64
	Properties
	Create
	Description
	The captured signature image.
DocumentContentType	Туре
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort
	Description
	The data type of the captured signature.

e, Sort
ptured signature.
Sort
otured signature image.
Sort
ointment, work order, or work order line item that the service
or.
c relationship field.
onsent, Order, ServiceAppointment, WorkOrder,
Nillable, Sort
report was signed.
create, Filter, Group, Nillable, Sort

Field Name	Details
	Description The role of the person signing the service report. Your org comes with one signature type, Default. A service report template can only contain one signature per type. If you plan to collect multiple signatures on service reports, create additional values for the Signature Type field.
	Create at least one value for every role that might need to sign a service report. For example, Technician, Customer, Supervisor, or Supplier. If some service reports will be signed by multiple people in one role—for example, all technicians present at an appointment—create numbered types: Technician 1, Technician 2, and so forth.
	Note: You can create up to 1,000 signature types. You can't delete signature types, but you can deactivate them so they can't be used in service report templates. When you deactivate a type, it still appears on service report templates that used it, but you can't use it on new service report templates.
SignedBy	Type string
	Properties Create, Filter, Group, Nillable, Sort
	Description The name of the person signing.
SignedDate	Type dateTime
	Properties Create, Filter, Nillable, Sort
	Description The date and time of the signing.

Usage

Add signature blocks to service report templates to determine which signatures need to be gathered on reports that use the template. Service report templates can contain up to 20 signatures, and each signature must use a different Signature Type. For example, create a standard service report template that contains a customer signature and a technician signature.

To learn more about digital signatures, see Guidelines for Using Signatures on Service Reports.

Entitlement

Represents the customer support an account or contact is eligible to receive. This object is available in API version 18.0 and later. Entitlements may be based on an asset, product, or service contract.

Supported Calls

create(), delete(), describeLayout(), getDeleted(), getUpdated(), query(), retrieve(), search(),
undelete(), update(), upsert()

Field	Details
AccountId	Type reference
	Properties
	Create, Filter, Group, Sort
	Description ID of the Account associated with the entitlement.
AssetId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description Required. ID of the Asset associated with the entitlement. Must be a valid asset ID.
BusinessHoursId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description Required. ID of the BusinessHours associated with the entitlement. Must be a valid business hours ID.
CasesPerEntitlement	Type int
	Properties Filter, Group, Nillable, Sort
	Description The total number of cases the entitlement supports.
	This field is only available if IsPerIncident is true.
ContractLineItemId	Type reference
	Properties Filter, Group, Nillable, Sort

Field	Details
	Description Required. ID of the ContractLineItem associated with the entitlement. Must be a valid ID.
EndDate	Type date Properties Create, Filter, Nillable, Update Description
	The last day the entitlement is in effect.
IsPerIncident	Type boolean
	Properties Defaulted on create, Filter, Update
	Description Indicates whether the entitlement is limited to supporting a specific number of cases (true) or not (false).
LastReferencedDate	Type date
	Properties Filter, Nillable, Sort, Update
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type date
	Properties Filter, Nillable, Sort, Update
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Name	Type string
	Properties Create, Filter, Update
	Description Required. Name of the entitlement.

Field	Details
SvcApptBookingWindowsId	Type reference
	Properties Create, Filter, Group, Sort, Nillable, Update
	Description
	The operating hours that the entitlement's work orders should respect. The label in the user interface is Operating Hours. Available only if Field Service is enabled.
RemainingCases	Type int
	Properties Create, Filter, Nillable, Update
	Description The number of cases the entitlement can support. This field decreases in value by one each time a case is created with the entitlement.
	This field is only available if IsPerIncident is selected.
RemainingWorkOrders	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The number of agreed work orders remaining to be created.
ServiceContractId	Type reference
	Properties
	Create, Filter, Nillable, Update
	Description Required. ID of the ServiceContract associated with the entitlement. Must be a valid ID.
SlaProcessId	Type reference
	Properties Create, Filter, Nillable, Update
	Description ID of the SlaProcess associated with the entitlement. This field is available in version 19.0 and later.
StartDate	Type date

Details
Properties
Create, Filter, Nillable, Update
Description
The first date the entitlement is in effect.
Туре
picklist
Properties
Filter, Nillable
Description
Status of the entitlement, such as Expired.
Туре
reference
Properties
Create, Filter, Group, Sort, Nillable, Update
Description
The operating hours of the entitlement. This field is visible only if Field Service is
enabled.
Туре
picklist
Properties
Create, Defaulted on create, Filter, Nillable, Update
Description
The type of entitlement, such as Web or phone support.
Туре
int
Properties
Create, Filter, Group, Nillable, Sort, Update
Description
Total number of work orders available for this entitlement.

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

EntitlementChangeEvent (API version 44.0)

Change events are available for the object.

EntitlementFeed (API version 23.0)

Feed tracking is available for the object.

EntitlementHistory

History is available for tracked fields of the object.

EntityMilestone

Represents a required step in a customer support process on a work order. The Salesforce user interface uses the term "object milestone. This object is available in API version 37.0 and later.



Note: Milestones on cases use the CaseMilestone object type.

Supported Calls

delete(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete(),
update()

Special Access Rules

- As of Summer '20 and later, only Salesforce admins, users with access to the Case, Entitlement, or Work Order objects, and users with the View Setup and Configuration permission can access this object.
- Entitlement management must be enabled.
- Work orders or Field Service must be enabled.

Field Name	Details
ActualElapsedTimeInDays	Type double
	Properties Filter, Nillable, Sort
	Description The number of days that it took to complete a milestone. (Elapsed Time) – (Stopped Time) = (Actual Elapsed Time)
	Note: To display this field, select Enable stopped time and actual elapsed time on the Entitlement Settings page and add the field to the object milestone page layout.
ActualElapsedTimeInHrs	Type double
	Properties Filter, Nillable, Sort
	Description The number of hours that it took to complete a milestone. (Elapsed Time) – (Stopped Time) = (Actual Elapsed Time)

Field Name	Details
	Note: To display this field, select Enable stopped time and actual elapsed time on the Entitlement Settings page and add the field to the object milestone page layout.
ActualElapsedTimeInMins	Type int
	Properties Filter, Group, Nillable, Sort
	Description The number of minutes that it took to complete a milestone. (Elapsed Time) – (Stopped Time) = (Actual Elapsed Time)
	Note: To display this field, select Enable stopped time and actual elapsed time on the Entitlement Settings page and add the field to the object milestone page layout.
BusinessHoursId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The business hours on the milestone. If business hours aren't specified, the entitlement process business hours are used. If business hours are also not specified on the entitlement process, the business hours on the record are used.
CompletionDate	Type dateTime
	Properties Filter, Nillable, Sort, Update
	Description The date and time the milestone was completed.
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Available only for orgs with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the organization.
ElapsedTimeInDays	Type double

Field Name	Details
	Properties Filter, Nillable, Sort
	Description The number of days it took to complete a milestone, including time during which the milestone was stopped. Automatically calculated to include the business hours on the record. Elapsed time is calculated only after the Completion Date field is populated. (Elapsed Time) – (Stopped Time) = (Actual Elapsed Time).
ElapsedTimeInHrs	Type double
	Properties Filter, Nillable, Sort
	Description The number of hours it took to complete a milestone, including time during which the milestone was stopped. Automatically calculated to include the business hours on the record. Elapsed time is calculated only after the Completion Date field is populated. (Elapsed Time) – (Stopped Time) = (Actual Elapsed Time).
ElapsedTimeInMins	Type int
	Properties Filter, Group, Nillable, Sort
	Description The number of minutes it took to complete a milestone, including time during which the milestone was stopped. Automatically calculated to include the business hours on the record. Elapsed time is calculated only after the Completion Date field is populated. (Elapsed Time) – (Stopped Time) = (Actual Elapsed Time).
IsCompleted	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Icon (✔) that indicates a milestone completion.
IsViolated	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Icon (•••) that indicates a milestone violation.

Field Name	Details
MilestoneTypeId	Туре
	reference
	Properties
	Filter, Group, Nillable, Sort
	Description
	The ID of the milestone (for instance, First Response).
Name	Туре
	string
	Properties
	Filter, Group, Sort, Update
	Description
	The name of the milestone.
ParentEntityId	Туре
	reference
	Properties
	Filter, Group, Sort
	Description The ID of the record—for example, a work order—that contains the milestone.
SlaProcessId	Туре
	reference
	Properties
	Filter, Group, Nillable, Sort
	Description
	The entitlement process associated with the milestone.
StartDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort, Update
	Description The date and time that milestone tracking started.
	and
StoppedTimeInDays	Туре
	double
	Properties Filter, Nillable, Sort
	i iitei, Millabie, Soit

TargetResponseInDays

Details Field Name Description The number of days that an agent has been blocked from completing a milestone. For example, an agent may be waiting for a customer to reply with more information. Note: To display this field, select **Enable stopped time and actual elapsed time** on the Entitlement Settings page and add the field to the object milestone page layout. StoppedTimeInHrs Type double **Properties** Filter, Nillable, Sort Description The number of hours that an agent has been blocked from completing a milestone. For example, an agent may be waiting for a customer to reply with more information. Note: To display this field, select **Enable stopped time and actual** elapsed time on the Entitlement Settings page and add the field to the object milestone page layout. StoppedTimeInMins Type int **Properties** Filter, Group, Nillable, Sort Description The number of minutes that an agent has been blocked from completing a milestone. For example, an agent may be waiting for a customer to reply with more information. Note: To display this field, select **Enable stopped time and actual** elapsed time on the Entitlement Settings page and add the field to the object milestone page layout. TargetDate Type dateTime **Properties** Filter, Nillable, Sort Description The date and time to complete the milestone.

Type

double

Field Name	Details
	Properties Filter, Nillable, Sort
	Description The number of days to complete the milestone. Automatically calculated to include the business hours on the record.
TargetResponseInHrs	Type double
	Properties Filter, Nillable, Sort
	Description The number of hours to complete the milestone. Automatically calculated to include the business hours on the record.
TargetResponseInMins	Type int
	Properties Filter, Group, Nillable, Sort
	Description The number of minutes to complete the milestone. Automatically calculated to include the business hours on the record.
TimeRemainingInDays	Type string
	Properties Filter, Nillable, Sort
	Description The days that remain before a milestone violation. Automatically calculated to include the business hours on the record.
TimeRemainingInHrs	Туре
	string
	Properties Filter, Group, Nillable, Sort
	Description The hours that remain before a milestone violation. Automatically calculated to include the business hours on the record.
TimeRemainingInMins	Туре
	string
	Properties Group, Nillable, Sort

Field Name	Details
	Description The minutes that remain before a milestone violation. Automatically calculated to include the business hours on the record.
TimeSinceTargetInDays	Type string
	Properties Filter, Nillable, Sort
	Description The days that have elapsed since a milestone violation. Automatically calculated to include the business hours on the record.
TimeSinceTargetInHrs	Type string
	Properties Filter, Nillable, Sort
	Description The hours that have elapsed since a milestone violation. Automatically calculated to include the business hours on the record.
TimeSinceTargetInMins	Type string
	Properties Group, Nillable, Sort
	Description The minutes that have elapsed since a milestone violation. Automatically calculated to include the business hours on the record.

Usage

When you create an entitlement process, you select its type based on the type of record that you want the process to run on: Case or Work Order. Processes created before Summer '16 use the Case type. When a Work Order entitlement process runs on a work order, the resulting milestones on the work order are object milestones. Conversely, when a Case entitlement process runs on a case, the resulting milestones are case milestones, a separate standard object.



Tip: If an entitlement has an entitlement process associated with it, don't use the entitlement for multiple types of support records. An entitlement process works only on records that match the process's type. For example, when a Case entitlement process is applied to an entitlement, the process runs only on cases associated with that entitlement. If a work order is also associated with the entitlement, the process doesn't run on the work order. To ensure that the milestones you set up work as expected, associate a customer's work orders and cases with different entitlements.

Customize page layouts, validation rules, and more for object milestones from the Object Milestones node in Setup under Entitlement Management.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

EntityMilestoneFeed

Feed tracking is available for the object.

EntityMilestoneHistory

History is available for tracked fields of the object.

Expense

Represents an expense linked to a work order. Service resource technicians can log expenses, such as tools or travel costs. This object is available in API version 49.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
AccountId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the account associated with the linked work order.
Amount	Туре
	currency
	Properties
	Create, Filter, Sort, Update
	Description
	The amount of the expense.
CurrencyIsoCode	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Available only if the multicurrency feature is enabled. Contains the ISO code for any currency
	allowed by the organization.
Description	Туре
	textarea

Field	Details
	Properties
	Create, Nillable, Update
	Description A description for the expense.
Discount	Туре
	percent
	Properties Create, Filter, Nillable, Sort, Update
	Description The percentage deducted from the Subtotal price. Available in version 51.0 and later.
ExpenseEndDate	Туре
	date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description If the expense was incurred over multiple days, the Expense End Date is the last day that the expense covers.
ExpenseNumber	Туре
	string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The number that uniquely identifies the expense.
ExpenseStartDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description If the expense was incurred over multiple days, the Expense Start Date is the first day that the expense covers.
ExpenseType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The type of expense. Possible values are:

Field	Details
	• Billable
	• Non-Billable
	The default value is Billable.
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The ID of the user who owns the expense record.
Quantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The number of items purchased in this record. Available in version 51.0 and later.
Subtotal	Type currency
	Properties Filter, Nillable, Sort
	Description The subtotal price calculated as the product of Quantity and UnitPrice. Available in version 51.0 and later.
	This is a calculated field.

Field	Details
Title	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A title that identifies the expense.
	This field is available in API version 50.0 and later.
TotalPrice	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	The total price of the transaction which is equal to the discounted subtotal: Subtotal -
	(Discount * Subtotal). Available in version 51.0 and later.
	This is a calculated field.
TransactionDate	Туре
	date
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The day that the expense was incurred, or the payment date for the expense.
UnitPrice	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The price of one item on the record. Available in version 51.0 and later.
WorkOrderId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the work order associated with the expense.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ExpenseChangeEvent (API version 55.0)

Change events are available for the object.

ExpenseFeed

Feed tracking is available for the object.

ExpenseHistory

History is available for tracked fields of the object.

ExpenseOwnerSharingRule

Sharing rules are available for the object.

ExpenseShare

Sharing is available for the object.

ExpenseReport

Represents a report that summarizes expenses. This object is available in API version 50.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization.
Description	Туре
	textarea
	Properties Create, Nillable, Update
	Description A description for the expense report.
ExpenseReportNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description An auto-generated number identifying the expense report.

Field	Details
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record. If this value is null, this
	record might only have been referenced (LastReferencedDate) and not viewed.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The ID of the user who owns the expense report record.
Title	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A title that identifies the expense report.
TotalExpenseAmount	Туре
-	currency
	Properties
	Filter, Nillable, Sort
	Description
	The sum of all expense entries in the report.
	This is a calculated field.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ExpenseReportFeed

Feed tracking is available for the object.

ExpenseReportHistory

History is available for tracked fields of the object.

${\bf Expense Report Share}$

Sharing is available for the object.

ExpenseReportEntry

Represents an entry in an expense report. This object is available in API version 50.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Туре
currency
Properties
Filter, Nillable, Sort
Description
The amount of the expense.
Туре
picklist
Properties
Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
Description
Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization.
Туре
reference
Properties
Create, Filter, Group, Sort, Update
Description
The expense that corresponds to the expense report entry.
Туре
string

Field	Details
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated number identifying the expense report entry.
ExpenseReportId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The expense report that's associated with the expense report entry.
ExpenseType	Туре
	picklist
	Properties
	Defaulted on create, Filter, Group, Nillable, Sort
	Description
	The type of expense. Possible values are:
	• Billable
	• Non-Billable
	The default value is Billable.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record. If this value is null, this
	record might only have been referenced (LastReferencedDate) and not viewed.
Title	Туре
	string
	Properties

Field	Details
	Description A title that identifies the expense.
TransactionDate	Type date
	Properties Filter, Group, Nillable, Sort
	Description The day that the expense was incurred, or the payment date for the expense.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ExpenseReportEntryFeed

Feed tracking is available for the object.

ExpenseReportEntryHistory

History is available for tracked fields of the object.

FieldServiceMobileSettings

Represents a configuration of settings that control the Field Service iOS and Android mobile app experience. This object is available in API version 38.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), query(), retrieve(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
BgGeoLocationAccuracy	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description The accuracy of geolocation tracking of services resources while the app is running in the background. Lowering accuracy reduces battery consumption for mobile devices. Available in API version 41.0 and later. Picklist options:

Field Name	Details
	 Medium—Accurate to within about 100 meters.
	 Coarse—Accurate to within about 1 kilometer.
	 Very Coarse—Accurate to within about 3 kilometers.
	The default value is Coarse.
BgGeoLocationMinUpdateFreqMins	Туре
	int
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description The frequency of geolocation poling of services resources while the app is running in the background. Less frequent poling decreases battery consumption for mobile devices. The label in the UI is Minimum Update Frequency of Geo Location in Minutes (Background). Available in API version 41.0 and later.
BrandInvertedColor	Туре
	string
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The color of toasts and the contrast color of the floating action button.
ContrastInvertedColor	Туре
	string
	Properties Create Defaulted an greate Filter Cream Cart Hadate
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description The color of secondary backgrounds in the UI.
ContrastPrimaryColor	Туре
	string
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description The color of primary text.
ContrastQuaternaryColor	Туре
	string
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The color of secondary lines that delineate different areas of the UI.

Field Name	Details
ContrastQuinaryColor	Туре
	string
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The color of primary backgrounds in the UI.
ContrastSecondaryColor	Туре
	string
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The color of secondary text.
ContrastTertiaryColor	Туре
	string
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The color of the icons on the settings screen and of primary lines that delineate different areas of the UI.
DefaultListViewDeveloperName	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The API name of the default service appointment list view on the schedule screen.
DeveloperName	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The API name of the set of field service mobile settings.
	Note: Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.
FeedbackPrimaryColor	Type string

Field Name	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The color of error messages.
FeedbackSecondaryColor	Time
-	Type string
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The color of success messages.
FeedbackSelectedColor	Туре
	string
	Properties Create Defaulted on create Croup Sort Undate
	Create, Defaulted on create, Group, Sort, Update Description
	The color indicating the user's current selection.
FutureDaysInDatePicker	Type
	int
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The number of days into the future that a user can select from the date picker on the schedule screen.
GeoLocationAccuracy	Туре
	picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description The accuracy of service resource geolocation tracking. Lowering accuracy reduces battery consumption for mobile devices. Picklist values:
	• Fine—Accurate to within 10 meters.
	 Medium—Accurate to within 100 meters.
	Coarse—Accurate to within 1 kilometer.
	The default value is Medium.
GeoLocationMinUpdateFreqMins	Type int

Field Name	Details
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The minimum number of minutes between attempts to poll geolocation.
IsAssignmentNotification	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Controls whether service appointment notifications are sent when the service
	resource is assigned the appointment. Default is false. This field is available in API version 46.0 and later.
	in API version 46.0 and later.
IsDefault	Туре
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	Indicates that the set of field service mobile settings is the default set that is
	automatically assigned to users. You can't make a different settings record the
	default, but you can modify the default settings record. Default is false.
	Available in API version 41.0 and later.
IsDispatchNotification	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Controls whether service appointment notifications are sent when the service
	resource is dispatched for the appointment. Default is false. This field is
	available in API version 46.0 and later.
IsScheduleViewResourceAbsences	Turno
(Beta)	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Determines whether resource absences appear in the Schedule tab of the mobile

Field Name	Details
	Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.
IsSendLocationHistory	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Controls whether geolocation tracking of services resources is enabled. Default is false.
IsShowEditFullRecord	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Controls whether users can edit records with the field service mobile app. Default is false.
IsTimeSheetEnabled	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Controls whether users can access time sheets on their mobile devices (Beta). Default is false.
IsTimeZoneEnabled	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Controls whether the time zone of timesheet entries on the mobile app is recorded. The current time zone is recorded in the LocationTimeZone field of the TimeSheetEntry object. Default is false. Available in API version 50.0 and later.
IsUseSalesforceMobileActions	Type boolean
	Properties Defaulted on create, Filter, Group, Sort

Field Name	Details
	Description Reserved for future use.
Language	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The localization preference for a user. The format is a two letter language code and, if there's a dialect, followed by the two letter dialect, for example, fr for French, and fr_BE for Belgian French
MasterLabel	Type string
	Properties
	Create, Filter, Group, Sort, Update
	Description The label in the UI for the set of field service mobile settings. Available in API version 41.0 and later.
MetadataCacheTimeDays	Type int
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The number of days that org metadata, such as layouts, is kept in the app's local cache of memory.
NavbarBackgroundColor	Type string
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The color of the top bar in the app.
NavbarInvertedColor	Type string
	Properties Create, Defaulted on create, Group, Sort, Update
	Description The secondary color of the tap bar in the app.

Field Name	Details
PastDaysInDatePicker	Туре
	int
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description The number of days into the past that a user can select from the date picker on the schedule screen.
PrimaryBrandColor	Туре
	string
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The main branding color used throughout the UI.
QuickStatusChangeFlowName	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of an existing Field Service flow with a Quick Status Change action to change the work order or service appointment status or both. This applies to flows invoked on the mobile app only. This field is available in API version 51.0 and later.
RecordDataCacheTimeMins	Туре
	int
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The number of minutes that record data is kept in the app's local cache of
	memory.
SecondaryBrandColor	Туре
	string
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The color of action buttons.
TimeIntervalSetupMins	Туре
	picklist

Field Name	Details
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Controls the spacing of picklist options for time values such as when creating resource absences.
UpdateScheduleTimeMins	Туре
	int
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The minimum number of minutes between attempts to update a user's schedule.
	Note: The user's schedule might not refresh on this cadence if the user's device isn't connected to a network or doesn't have adequate battery life.

Field Service Mobile settings allow you to create sets of settings to apply to different field service mobile users. The settings apply to both the Android and iOS versions of the app.

For example, suppose you want to accommodate workers that are color blind, or who work in dark or bright conditions. You can choose different branding options for different workers to suit their needs, and assign them to their profiles.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

FieldServiceMobileSettingsChangeEvent (API version 55.0)

Change events are available for the object.

LinkedArticle

Represents a knowledge article that is attached to a work order, work order line item, or work type. This object is available in API version 37.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()

Special Access Rules

Knowledge must be enabled in your org. Field Service must be enabled. Only users that have access to the Knowledge article and the parent record linked to it can access this object.

In Knowledge in Salesforce Classic, only Field Service objects such as Work Order, Work Type, and Work Order Line Item are supported for linked articles. In Lightning Knowledge, other social objects such as Chat, Messaging, Voice Call, and Social Post are supported for linked articles.

Field Name	Details
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Available only for orgs with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the organization.
KnowledgeArticleId	Type reference
	Properties Create, Filter, Group, Nillable, Sort
	Description The ID of the Knowledge article attached to the record. The label in the user interface is Knowledge Article ID.
KnowledgeArticleVersionId	Type reference
	Properties Create, Filter, Group, Nillable, Sort
	Description The version of the Knowledge article attached to the record. This field lists the title of the attached version and links to the version. The label in the user interface is Article Version.
	When you attach an article to a work order, that version of the article stays associated with the work order, even if later versions are published. If needed, you can detach and reattach an article to a work order to link the latest version.
LinkedEntityId	Type reference
	Properties Create, Filter, Group, Nillable, Sort
	Description The ID of the record that the Knowledge article is attached to. The label in the user interface is Linked Record ID.

Field Name	Details
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The title of the article. The label in the user interface is Article Title.
RecordTypeId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the article's record type, if used. This field is only available for Lightning Knowledge.
Туре	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	(Read only) The type of record that the Knowledge article is attached to. For example, work order. The label in the user interface is Linked Object Type.

Admins can customize linked articles' page layouts, fields, validation rules, and more from the Linked Articles page in Setup.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LinkedArticleFeed

Feed tracking is available for the object.

LinkedArticleHistory

History is available for tracked fields of the object.

Location

Represents a warehouse, service vehicle, work site, or other element of the region where your team performs field service work. In API version 49.0 and later, you can associate activities with specific locations. Activities, such as the tasks and events related to a location, appear in the activities timeline when you view the location detail page. Also in API version 49.0 and later, Work.com users can view Employees as a related list on Location records. In API version 51.0 and later, this object is available for Omnichannel Inventory and represents physical locations where inventory is available for fulfilling orders.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

At least one of these features must be enabled:

- Commerce Store
- Contact Tracing for Employees
- Employee Experience
- Field Service
- Fulfillment Orders
- Health Cloud
- Industries Insurance
- Industries Visit
- Locations
- Omnichannel Inventory
- Public Sector
- Retail Execution
- Work.com

Field Name	Details
AssignedFoCount	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The number of fulfillment orders assigned to the location. Confirming held fulfillment order capacity increments this value. To reset the location's capacity, set this value to 0.
	This field is available when Order Management is installed and configured. By default, it's hidden by field-level security.
	This field is available in API version 55.0 and later.
CloseDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Date the location closed or went out of service.

Field Name	Details
ConstructionEndDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date construction ended at the location.
ConstructionStartDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date construction began at the location.
Description	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A brief description of the location.
DrivingDirections	Туре
	string
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Directions to the location.
ExternalReference	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Identifier of a location.
FoCapacity	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description The maximum number of fulfillment orders that can be assigned to the location per time period. If this value is null, then this location's capacity isn't limited.
	This field is available when Order Management is installed and configured. By default, it's hidden by field-level security.
	This field is available in API version 55.0 and later.
IsInventoryLocation	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the location stores parts.
	Note: This field must be selected if you want to associate the location with product items.
IsMobile	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the location moves. For example, a truck or tool box.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the location was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date the location was last viewed.
Latitude	Type double

Field Name	Details
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The latitude of the location.
Location	Туре
	location
	Properties Nillable
	Description
	The geographic location.
LocationLevel	Туре
	int
	Properties
	Filter, Group, Nillable, Sort
	Description
	The location's position in a location hierarchy. If the location has no parent or
	child locations, its level is 1. Locations that belong to a hierarchy have a level of
	1 for the root location, 2 for the child locations of the root location, 3 for their
	children, and so forth.
LocationType	Туре
	picklist
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Picklist of location types. It has no default values, so you must populate it before
	creating any location records.
LogoId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A ContentAsset representing a logo for the location.
	This field is available in API version 50.0 and later.
	This is a relationship field.
	Relationship Name
	Logo

Field Name	Details
	Relationship Type
	Lookup
	Refers To
	ContentAsset
Longitude	Туре
	double
	Properties Control of the New York Control of the New
	Create, Filter, Nillable, Sort, Update
	Description The lengitude of the legation
	The longitude of the location.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the location. For example, Service Van #4.
OpenDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date the location opened or came into service.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The location's owner or driver.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To
	Group, User

Field Name	Details
ParentLocationId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The location's parent location. For example, if vans are stored at a warehouse when not in service, the warehouse is the parent location.
	This is a relationship field.
	Relationship Name
	ParentLocation
	Relationship Type Lookup
	Refers To
	Location
PossessionDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date the location was purchased.
Priority	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The priority of the location when routing orders. No default values are included. Add values to the picklist and reference them in your custom routing logic.
	This field is available when Order Management is installed and configured. By default, it's hidden by field-level security.
	This field is available in API version 55.0 and later.
RemodelEndDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date when remodel construction ended at the location.

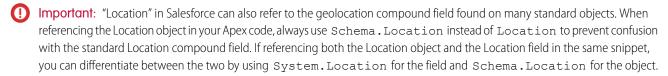
Field Name	Details
RemodelStartDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date when remodel construction started at the location.
RootLocationId	Туре
	reference
	Properties
	Filter, Group, Nillable, Sort
	Description
	(Read Only) The top-level location in the location's hierarchy.
	This is a relationship field.
	Relationship Name RootLocation
	Relationship Type
	Lookup
	Refers To
	Location
ShouldSyncWithOci	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the location should sync its data with Omnichannel Inventory. The default value is false.
	This field is available in API version 51.0 and later.
ShouldTrackFoCapacity	Туре
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the location should track its fulfillment order capacity. The default value is false.
	This field is available when Order Management is installed and configured. By default, it's hidden by field-level security.
	This field is available in API version 55.0 and later.

Field Name	Details
TimeZone	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Picklist of available time zones.
VisitorAddressId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Lookup to an account's or client's address.
	This is a relationship field.
	Relationship Name VisitorAddress
	Relationship Type Lookup
	Refers To Address

Before creating any location records, add at least one value to the Location Type picklist. LocationType is a required field.

To track your inventory in Salesforce, create product items, which represent the stock of a particular product a particular location. For example, create a product item that represents the 500 bolts you have in stock at your Warehouse A location. Each product item must be associated with a location.

To get a more granular picture of your field service operation, associate locations with service territories. For example, if a warehouse is located in a particular service territory, add it as a service territory location.



Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LocationChangeEvent (API version 48.0)

Change events are available for the object.

LocationFeed

Feed tracking is available for the object.

LocationHistory

History is available for tracked fields of the object.

LocationOwnerSharingRule

Sharing rules are available for the object.

LocationShare

Sharing is available for the object.

MaintenanceAsset

Represents an asset covered by a maintenance plan in field service. Assets can be associated with multiple maintenance plans.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
AssetId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The asset associated with the maintenance asset.
ContractLineItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Contract line item associated with the maintenance asset. This field can only list a contract line item that is associated with the asset, and whose parent service contract is associated with the parent maintenance plan.
LastReferencedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort

Field Name	Details
	Description The date when the maintenance asset was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the product request was last viewed.
MaintenanceAssetNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, Sort
	Description An auto-assigned number that identifies the maintenance asset.
MaintenancePlanId	Type reference
	Properties Create, Filter, Group, Sort
	Description Maintenance plan associated with the maintenance asset.
NextSuggestedMaintenanceDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The suggested date of service for the maintenance asset's first work order (not the date the work order is created). This corresponds to the work order's SuggestedMaintenanceDate. If left blank when the maintenance asset is created, this field inherits its initial value from the related maintenance plan.
	This field auto-updates after each batch is generated. Its label in the user interface is Date of the first work order in the next batch.
WorkTypeId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	Work type associated with the maintenance asset. Work orders generated from the maintenance plan inherit its work type's duration, required skills and products, and linked articles. Maintenance assets covered by the plan use the same work type, though you can update them to use a different one.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

MaintenanceAssetChangeEvent (API version 48.0)

Change events are available for the object.

MaintenanceAssetFeed

Feed tracking is available for the object.

MaintenanceAssetHistory

History is available for tracked fields of the object.

MaintenancePlan

Represents a preventive maintenance schedule for one or more assets in field service.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
AccountId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The associated account, which typically represents the customer receiving the maintenance service.
ContactId	Type reference

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description
	The associated contact.
Description	Type textarea
	Properties Create, Nillable, Update
	Description A brief description of the plan.
DoesAutoGenerateWorkOrders	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Turns on auto-generation of work order batches for a maintenance plan and prohibits the manual generation of work orders via the Generate Work Orders action. If this option is selected, a new batch of work orders is generated for the maintenance plan on the NextSuggestedMaintenanceDate listed on each maintenance asset, or on the maintenance plan if no assets are included. If a GenerationHorizon is specified, the date of generation is that many days earlier.
DoesGenerateUponCompletion	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description If both this option and DoesAutoGenerateWorkOrders are set to true, a new batch of work orders isn't generated until the last work order generated from the maintenance plan is completed. A work order is considered completed when its status falls into one of the following status categories: Cannot Complete, Canceled, Completed, or Closed.
	If a maintenance plan covers multiple assets, work orders are generated per asset. If a maintenance asset's final work order is completed late, its work order generation is delayed, which may cause a staggered generation schedule between maintenance assets.
EndDate	Type date

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The last day the maintenance plan is valid.
Frequency	Type int
	Properties Create, Filter, Group, Sort, Update
	Description (Optional) Amount of time between work orders. The unit is specified in the FrequencyType field.
FrequencyType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description (Optional) The unit of frequency:
	• Days
	WeeksMonths
	• Years
	For example, to perform monthly maintenance visits you need a work order for each visit, so enter 1 as the Frequency and select Months.
GenerationHorizon	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Moves up the timing of batch generation if DoesAutoGenerateWorkOrders is set to true. A generation horizon of 5 means the new batch of work orders is generated 5 days before the maintenance asset's (or maintenance plan's, if there are no assets) NextSuggestedMaintenanceDate. The generation horizon must be a whole number.
GenerationTimeframe	Type int
	Properties Create, Filter, Group, Sort, Update

Field Name	Details
	Description
	(Required) How far in advance work orders are generated in each batch. The unit is specified in the GenerationTimeframeType field.
GenerationTimeframeType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description (Required) The generation timeframe unit:
	 Days
	 Weeks
	 Months
	• Years
	For example, if you need work orders for six months, enter 6 and select Months
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
LocationId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Where the service takes place.

Field Name	Details
MaintenancePlanNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, Sort
	Description
	(Read Only) An auto-assigned number that identifies the maintenance plan.
MaintenancePlanTitle	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A name for the maintenance plan.
MaintenanceWindowEndDays	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Days after the suggested service date on the work order that its service appointment can be scheduled.
MaintenanceWindowStartDays	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Days before the suggested service date on the work order that its service appointment can be scheduled.
	The maintenance window start and end fields affect the Earliest Start Permitted and Due Date fields on the maintenance plan's work orders' service appointments. For example, if you enter 3 for both the maintenance window start and end, the
	Earliest Start Permitted and the Due Date will be 3 days before and 3 days after, respectively, the Suggested Maintenance Date on each work order. If the maintenance window fields are left blank, the service appointment date fields list their work order's suggested maintenance date.
Nevt Suggest adMaintenanceDate	
NextSuggestedMaintenanceDate	Type
	date
	Properties
	Create, Filter, Group, Sort, Update

Field Name Details

Description

The suggested date of service for the first work order (not the date the work order is created). This corresponds to the work order's

SuggestedMaintenanceDate. You can use this field to enforce a delay before the first maintenance visit (for example, if monthly maintenance should begin one year after the purchase date). Its label in the user interface is Date of the first work order in the next batch.

For example, if you want the first maintenance visit to take place on May 1, enter May 1. When you generate work orders, the earliest work order will list a suggested maintenance date of May 1, and the dates on the later work orders will be based on the GenerationTimeframe and Frequency.



Important: Maintenance assets also list a

NextSuggestedMaintenanceDate, which is initially inherited from the maintenance plan. If the plan has maintenance assets, this date auto-updates on the maintenance assets after each batch is generated, but doesn't update on the maintenance plan itself because batch timing is calculated at the maintenance asset level. If the plan doesn't have maintenance assets, this date auto-updates on the maintenance plan after each batch is generated.

OwnerId

Type

reference

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

The owner of the maintenance plan.

ServiceContractId

Type

reference

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

The service contract associated with the maintenance plan. The service contract can't be updated if any child maintenance asset is associated with a contract line item from the service contract.

StartDate

Type

date

Properties

Create, Filter, Group, Sort, Update

Description

The first day the maintenance plan is valid.

Field Name	Details
SvcApptGenerationMethod	Туре
	picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description The service appointment generation method.
	One service appointment per work order
	One service appointment per work order line item
	If your existing maintenance plans have work orders or work order line items associated with them, you can't change their generation methods. To change pre-existing maintenance plan generation methods, either delete the work orde and regenerate them or delete the maintenance plan and recreate it with the needed generation methods.
	If Work Order Generation Method is set to One work order per asset, you can't set a Service Appointment Generation Method.
	If Work Order Generation Method is set to One work order line item per asset, you must select a Service Appointment Generation Method.
WorkOrderGenerationMethod	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description The work order generation method.
	One work order per asset
	One work order line item per asset
	If your existing maintenance plans have work orders or work order line items associated with them, you can't change their generation methods. To change pre-existing maintenance plan generation methods, either delete the work orde and regenerate them or delete the maintenance plan and recreate it with the needed generation methods.
	If Work Order Generation Method is left as None, the generation is defaulted to one work order per asset.
	When One work order line item per asset is set, and all maintenance assets hav the same Next Suggested Maintenance Date on the maintenance plan, they ar

set a Service Appointment Generation Method.

grouped in one work order. However, if maintenance assets have different Next Suggested Maintenance Dates, multiple work orders are created for each date.

If Work Order Generation Method is set to One work order per asset, you can't

Field Name	Details
WorkOrderGenerationStatus	Type picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description (Read Only) Indicates the status of work order generation:
	 NotStarted—the default value, work order generation has not started InProgress—work order generation is underway Completed—work order generation is complete Unsuccessful—it was not possible to generate work orders You can generate only one batch at a time.
WorkTypeId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The associated work type. Work orders generated from the maintenance plan inherit its work type's duration, required skills and products, and linked articles Maintenance assets covered by the plan use the same work type, though you can update them to use a different one.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

MaintenancePlanChangeEvent (API version 48.0)

Change events are available for the object.

MaintenancePlanFeed

Feed tracking is available for the object.

MaintenancePlanHistory

History is available for tracked fields of the object.

Maintenance Plan Owner Sharing Rule

Sharing rules are available for the object.

MaintenancePlanShare

Sharing is available for the object.

MaintenanceWorkRule

Represents the recurrence pattern for a maintenance record. This object is available in API version 49.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the line item was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description The date when the line item was last viewed.
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	Name of this maintenance work rule.
NextSuggestedMaintenanceDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The next date on which this rule will generate maintenance items.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The assigned owner of the maintenance work rule.

Field	Details
ParentMaintenancePlanId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The maintenance plan associated with the maintenance work rule.
ParentMaintenanceRecordId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The maintenance record this work rule applies to.
RecordsetFilterCriteriaId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	ID of the recordset filter criteria associated with this maintenance work rule. Available in API version 52.0 and later.
RecurrencePattern	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The RRULE that defines the pattern of recurrence for this work order rule.
SortOrder	Туре
	int
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The sort order that applies to this work order rule.
Title	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update

Field	Details
	Description The title of this work order rule.
Туре	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The type of maintenance work rule. Available values are:
	• Criteria-based
	• Calendar-based (default)
	Available in API version 52.0 and later.
WorkTypeId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the work type that this work order rule generates.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

Maintenance Work Rule Change Event

Change events are available for the object.

MaintenanceWorkRuleFeed

Feed tracking is available for the object.

MaintenanceWorkRuleHistory

History is available for tracked fields of the object.

Maintenance Work Rule Owner Sharing Rule

Sharing rules are available for the object.

Maintenance Work Rule Share

Sharing is available for the object.

MobileSettingsAssignment

Represents the assignment of a particular field service mobile settings configuration to a user profile. This object is available in API version 41.0 and later.

Supported Calls

create(), delete(), describeSObjects(), query(), retrieve(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Fields

Field Name	Details
FieldServiceMobileSettingsId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The ID of a set of field service mobile settings.
ProfileId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the profile to associate with the set of field service mobile settings.

OperatingHours

Represents the hours in which a service territory, service resource, or account is available for work in Field Service, Salesforce Scheduler, or Workforce Engagement. This object is available in API version 38.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field Name	Details
Description	Type textarea
	Properties Create, Nillable, Update
	Description The description of the operating hours. Add any details that aren't included in the name.
LastReferencedDate	Type dateTime

Field Name	Details
	Properties Filter, Nillable, Sort
	Description The date when the operating hours record was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the operating hours record was last viewed.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description The name of the operating hours. For example, Summer Hours, Winter Hours, Or Peak Season Hours.
TimeZone	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	Description The time zone which the operating hours fall within.

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

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

To view a service resource's operating hours for a particular territory, navigate to their Service Territories related list and click the Member Number for the territory. This takes you to the service territory member detail page, which lists the member's operating hours and dates during which they belong to the territory.

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

Operating Hours Feed

Feed tracking is available for the object.

OperatingHoursHoliday

Represents the day or hours for which a service territory or service resource is unavailable in Field Service. This object is available in API version 54.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field	Details
DateAndTime	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	(Read-Only) The date or time for the holiday.
HolidayId	Type reference
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The ID of the holiday that's related to the operating hours indicated in the Operating Hours Id field.
	This is a relationship field.
	Relationship Name
	Holiday
	Relationship Type
	Lookup
	Refers To
	Holiday
LastReferencedDate	Туре
	dateTime

Field	Details
	Properties Filter, Nillable, Sort
	Description The date and time that the current user last viewed a record related to this object.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this object.
OperatingHoursHolidayNumber	Type string Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description (Read-Only) An auto-generated number identifying the operating hours holiday.
OperatingHoursId	Type reference
	Properties Create, Filter, Group, Sort
	Description The ID of the operating hours that's related to the holiday indicated in the HolidayId field.
	This is a relationship field.
	Relationship Name OperatingHours
	Relationship Type Lookup
	Refers To OperatingHours

Pricebook2

Represents a price book that contains the list of products that your org sells.



Note: Price books are represented by Pricebook2 objects. As of API version 8.0, the Pricebook object is no longer available. Requests containing Pricebook are refused, and responses don't contain the Pricebook object.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
Description	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description Text description of the price book.
IsActive	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the price book is active (true) or not (false). Inactive price books are
	hidden in many areas in the user interface. You can change this field's value as often as
	necessary. Label is Active .
IsArchived	Туре
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether the price book has been archived (true) or not (false). This field is read
	only.
IsDeleted	Туре
	boolean
	Properties
	Defaulted on create, Filter
	Description
	Indicates whether the price book has been moved to the Recycle Bin ($true$) or not (false).
	Label is Deleted .
IsStandard	Туре
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort

Field	Details
	Description Indicates whether the price book is the standard price book for the org (true) or not (false). Every org has one standard price book—all other price books are custom price books.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description Required. Name of this object. This field is read-only for the standard price book. Label is Price Book Name .
ValidFrom	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date and time when a Commerce price book is initially valid. If this field is null, the price book is valid immediately when active. Available in API version 48.0 and later.
ValidTo	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description
	The date and time when a Commerce price book is valid to. If this field is null, the price book is valid until it's deactivated. Available in API version 48.0 and later.

A price book is a list of products that your org sells.

- Each org has one standard price book that defines the standard or generic list price for each product or service that it sells.
- An org can have multiple custom price books to use for specialized purposes, such as for discounts, different channels or markets, or select accounts or opportunities. While your client application can create, delete, and update custom price books, your client application can only update the standard price book.
- For some orgs, the standard price book is the only price needed. If you set up other price books, you can reference the standard price book when setting up list prices in custom price books.

Use this object to query standard and custom price books that have been configured for your org. A common use of this object is to allow your client application to obtain valid Pricebook2 object IDs for use when configuring PricebookEntry records via the API.

Your client application can perform the following tasks on PricebookEntry objects:

- Query
- Create for the standard price book or custom price books.
- Update
- Delete
- Change the IsActive field when creating or updating records

PriceBook2, Product2, and PricebookEntry Relationships

In the API:

- Price books are represented by Pricebook2 records (as of version 8.0, the Pricebook object is no longer available).
- Products are represented by Product2 records (as of version 8.0, the Product object is no longer available).
- Each price book contains zero or more entries (represented by PricebookEntry records) that specify the products that are associated with the price book. A price book entry defines the price for which you sell a product at a particular currency.

These objects are defined only for those orgs that have products enabled as a feature. If the org doesn't have the products feature enabled, the Pricebook2 object doesn't appear in the describeGlobal() call, and you can't access it via the API.

If you delete a Pricebook2 while a line item references PricebookEntry in the price book, the line item is unaffected, but the Pricebook2 is archived and unavailable from the API.

For a visual diagram of the relationships between Pricebook2 and other objects, see Product and Schedule Objects.

Price Book Setup

The process of setting up a price book via the API usually means:

1. Load product data into Product2 records (creating one Product2 record for each product that you want to add).

- 2. For each Product2 record, create a PricebookEntry that links the Product2 record to the standard Pricebook2. Define a standard price for a product at a given currency (if you have multicurrency enabled) before defining a price for that product in the same currency in a custom price book.
- **3.** Create a Pricebook2 record to represent a custom price book.
- **4.** For each Pricebook2 record, creating a PricebookEntry for every Product2 that you want to add, specifying unique properties for each PricebookEntry (such as the UnitPrice and CurrencyIsoCode) as needed.

Code Sample—Java

```
public void pricebookSample() {
 try {
   //Create a custom pricebook
   Pricebook2 pb = new Pricebook2();
   pb.setName("Custom Pricebok");
   pb.setIsActive(true);
   SaveResult[] saveResults = connection.create(new SObject[]{pb});
   pb.setId(saveResults[0].getId());
   // Create a new product
   Product2 product = new Product2();
   product.setIsActive(true);
   product.setName("Product");
   saveResults = connection.create(new SObject[]{product});
   product.setId(saveResults[0].getId());
    // Add product to standard pricebook
   QueryResult result = connection.query(
        "select Id from Pricebook2 where isStandard=true"
    );
    SObject[] records = result.getRecords();
   String stdPbId = records[0].getId();
    // Create a pricebook entry for standard pricebook
    PricebookEntry pbe = new PricebookEntry();
   pbe.setPricebook2Id(stdPbId);
   pbe.setProduct2Id(product.getId());
   pbe.setIsActive(true);
   pbe.setUnitPrice(100.0);
   saveResults = connection.create(new SObject[]{pbe});
   // Create a pricebook entry for custom pricebook
   pbe = new PricebookEntry();
   pbe.setPricebook2Id(pb.getId());
   pbe.setProduct2Id(product.getId());
   pbe.setIsActive(true);
   pbe.setUnitPrice(100.0);
   saveResults = connection.create(new SObject[]{pbe});
  } catch (ConnectionException ce) {
   ce.printStackTrace();
  }
}
```

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

Pricebook2ChangeEvent (API version 48.0)

Change events are available for the object.

Pricebook2History

History is available for tracked fields of the object.

Product2

Represents a product that your company sells.

This object has several fields that are used only for quantity and revenue schedules (for example, annuities). Schedules are available only for orgs that have enabled the products and schedules features. If these features aren't enabled, the schedule fields don't appear in the DescribeSObjectResult, and you can't query, create, or update the fields.



Note: Product 2 objects represent products. As of API version 8.0, the Product object is no longer available. Requests that contain Product are refused, and responses don't contain the Product object.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
BillingPolicyId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the related billing policy. This field is available when Subscription Management is enabled. This field is available in API version 55.0 and later.
	This field is a relationship field.
	Relationship Name BillingPolicy
	Relationship Type Lookup
	Refers To BillingPolicy
CanUseQuantitySchedule	Type boolean

Field	Details
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the product can have a quantity schedule (true) or not (false). Label is Quantity Scheduling Enabled .
CanUseRevenueSchedule	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the product can have a revenue schedule (true) or not (false). Label is Revenue Scheduling Enabled .
ConnectionReceivedId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description ID of the PartnerNetworkConnection that shared this record with your organization. This field is available if you enabled Salesforce to Salesforce.
ConnectionSentId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description ID of the PartnerNetworkConnection that you shared this record with. This field is available if you enabled Salesforce to Salesforce. This field is supported using API versions earlier than 15.0. In all other API versions, this field's value is null. You can use the new PartnerNetworkRecordConnection object to forward records to connections.
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Available only for orgs with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the org.
Description	Type textarea

Field	Details
	Properties
	Create, Filter, Nillable, Sort, Update
	Description A text description of this record. Label is Product Description .
DisplayUrl	Type url
	Properties Create, Filter, Nillable, Sort, Update
	Description URL leading to a specific version of a record in the linked external data source.
ExternalDataSourceId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of the related external data source.
ExternalId	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unique identifier of a record in the linked external data source. For example, <i>ID #123</i> .
Family	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Name of the product family associated with this record. Product families are configured as picklists in the user interface. To obtain a list of valid values, call describeSObjects () and process the DescribeSObjectResult for the values associated with the Family field. Label is Product Family.
IsActive	Type
	boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether this record is active (true) or not (false). Inactive Product2 records are hidden in many areas in the user interface. You can change the IsActive flag on a Product2 object as often as necessary. Label is Active.
IsArchived	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Describes whether the product is archived. The default value is false.
IsDeleted	Type boolean
	Properties Defaulted on create, Filter
	Description Indicates whether the object has been moved to the Recycle Bin (true) or not (false). Label is Deleted .
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update

Field Details

Description

Required. Default name of this record. Label is **Product Name**.

NumberOfQuantityInstallments

Type

int

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

If the product has a quantity schedule, the number of installments.

NumberOfRevenueInstallments

Type

int

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

If the product has a revenue schedule, the number of installments.

ProductClass

Type

picklist

Properties

Defaulted on create, Filter, Group, Restricted picklist, Sort

Description

This field is read-only. Its value is determined by the value of the Type field and whether the product is associated with a ProductAttribute record. It describes whether a product is a simple product, a variation parent, or a product variation. Possible values are:

- Simple—This product has no variations
- VariationParent—This product is a variation parent. It's the base product for one
 or more product variations and, though it has its own stock-keeping unit (SKU), isn't a
 sellable entity. Instead, it's the parent of sellable entities—its variations.
- Variation—This product is a variation of a parent product. Each variation has its own SKU.

When the value of ProductClass = VariationParent, it never changes. The value of ProductClass changes between Simple and Variation when you attach or detach a ProductAttribute record to the product.

If you attach a ProductAttribute record to a product, then the product's ProductClass value changes to Variation. Conversely, when you detach all ProductAttribute records from a product, the ProductClass value changes to Simple.

The default value is Simple.

This field is available in API version 50.0 and later. It was introduced to support of B2B and B2C Commerce implementations.

Field	Details
ProductCode	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Default product code for this record. Your org defines the product code naming pattern.
QuantityInstallmentPeriod	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	If the product has a quantity schedule, the amount of time covered by the schedule.
QuantityScheduleType	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The type of the quantity schedule, if the product has one.
QuantityUnitOfMeasure	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Unit of the product; for example, kilograms, liters, or cases. This field comes with only one
	value, Each, so consider creating your own. The QuantityUnitOfMeasure field on
	ProductItem inherits this field's values.
RecalculateTotalPrice	Туре
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	Changes behavior of OpportunityLineItem calculations when a line item has child schedule
	rows for the $Quantity$ value. When enabled, if the rollup quantity changes, then the quantity rollup value is multiplied against the sales price to change the total price.
RevenueInstallmentPeriod	Туре
	picklist
	France.

Field	Details
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description If the product has a revenue schedule, the time period covered by the schedule.
RevenueScheduleType	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The type of the revenue schedule, if the product has one.
StockKeepingUnit	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The SKU for the product. Use in tandem with or instead of the ProductCode field. For example, you can track the manufacturer's identifying code in the Product Code field and assign the product a SKU when you resell it.
Type	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort
	Description
	The type of product. This field's value affects the read-only value of the ProductClassfield on the Product2 object. field.
	• Base—When Type = Base, then ProductClass = VariationParent.
	 Null—When Type = Null, then ProductClass = Simple.
	This field is available when B2B or B2C Commerce is enabled.
	This field is available in API version 50.0 and later.
TaxPolicyId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the related tax policy.
	This field is available when Subscription Management is enabled. This field is available in API version 55.0 and later.

Field	Details
	This field is a relationship field.
	Relationship Name TaxPolicy
	Relationship Type Lookup
	Refers To TaxPolicy

Schedule Enabled Flags

When enabling the schedules feature, you can decide whether to enable quantity schedules, revenue schedules, or both. In addition, you can use the API to control quantity and revenue scheduling at the product level via the CanuseQuantitySchedule and CanuseRevenueSchedule flags. A value of true for either flag indicates that the product and any OpportunityLineItems can have a schedule of that type. These flags can be set when creating or updating Product2 records.

Default Schedule Fields

The remaining schedule fields for this object define default schedules. Default schedule values are used to create an OpportunityLineltemSchedule when an OpportunityLineltem is created for the Product.

The default schedule fields support the following valid values (all fields are also nillable).

Field	Valid Values
RevenueScheduleType	Divide, Repeat
RevenueInstallmentPeriod	Daily, Weekly, Monthly, Quarterly, Yearly
NumberOfRevenueInstallments	Integer from 1 to 150, inclusive.
QuantityScheduleType	Divide, Repeat
QuantityInstallmentPeriod	Daily, Weekly, Monthly, Quarterly, Yearly
NumberOfQuantityInstallments	Integer from 1 to 150, inclusive

When you attempt to set the schedule fields when creating or updating, the API applies cross-field integrity checks. The integrity requirements are:

- If the schedule type is nil, the installment period and number of installments must be nil.
- If the schedule type is set to any value, then the installment period and number of installments must be non-nil.

Any create or update that fails these integrity checks is rejected with an error.

These default schedule fields, CanUseQuantitySchedule, and CanUseRevenueSchedule, are restricted picklist fields and are available only if the org has the schedules feature enabled.

Usage

Use this object to define the default product information for your org. This object is associated by reference with Pricebook2 objects via PricebookEntry objects. The same product can be represented in different price books as price book entries. In fact, the same product can be represented multiple times (as separate PricebookEntry records) in the same price book with different prices or currencies. A product can only have one price for a given currency within the same price book. To be used in custom price books, all standard prices must be added as price book entries to the standard price book.

You can query the products that have been configured for your org. For example, you can allow your client application to obtain valid product IDs for use when configuring PricebookEntry records via the API. Your client application can perform the following tasks on PricebookEntry objects:

- Query
- Create for the standard price book or custom price books.
- Update
- Delete
- Change the IsActive field when creating or updating records

This object is defined only for those orgs that have products enabled as a feature. If the org doesn't have the products feature, this object doesn't appear in the describeGlobal () call, and you can't describe or query this object.

If you try to delete a product via the API but there's an opportunity that uses that product, the delete fails. The workaround is to delete the product in the user interface, which gives you an option to archive the product.



Note: On opportunities and opportunity products, the workflow rules, validation rules, and Apex triggers fire when an update to a child opportunity product or schedule causes an update to the parent record. This means your custom application logic is enforced when there are updates to the parent record, ensuring higher data quality and compliance with your organization's business policies.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

Product2ChangeEvent (API version 44.0)

Change events are available for the object.

Product2Feed (API version 18.0)

Feed tracking is available for the object.

Product2History

History is available for tracked fields of the object.

ProductConsumed

Represents an item from your inventory that was used to complete a work order or work order line item in field service.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.



Note: To create products consumed, you need Read permission on product items.



Note: To delete products consumed, you need Edit, Create, and Read permission on product items.

Field Name	Details
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	Notes and context about the product consumed.
Discount	Туре
	percent
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The discount provided.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the product consumed was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the product consumed was last viewed.
ListPrice	Туре
	currency
	Properties
	Filter, Nillable, Sort

Field Name	Details
	Description The list price of the product.
PricebookEntryId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Price book associated with the product consumed. If the work order and the product item's associated product are related to the same price book, the Price Book Entry auto-populates based on the product item.
Product2Id	Type reference
	Properties
	Filter, Group, Nillable, Sort
	Description Product associated with the product consumed.
ProductConsumedNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, Sort
	Description (Read Only) Auto-generated number identifying the product consumed.
ProductItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort
	Description Product item associated with the product consumed. Creating a product consumed record subtracts the quantity consumed from the linked product item's quantity.
ProductName	Type string
	Properties Filter, Group, Nillable, Sort
	Description Name for the product consumed.

Туре
double
Properties
Create, Filter, Sort, Update
Description
The quantity of products consumed.
Туре
picklist
Properties
Filter, Group, Nillable, Sort
Description
Units of the consumed item; for example, kilograms or liters. Quantity Unit of
Measure picklist values are inherited from the Quantity Unit of Measure field on
products.
Туре
currency
Properties
Filter, Nillable, Sort
Description
The total price of the product items before discount.
Туре
currency
Properties
Filter, Nillable, Sort
Description
The total price paid for the product items.
Туре
currency
Properties
Create, Filter, Nillable, Sort, Update
Description
The price per unit of the product consumed.
Туре
reference
Properties
Create, Filter, Group, Sort

Details
Description
Work order that the product was consumed for.
Type reference
Properties
Create, Filter, Group, Nillable, Sort, Update
Description
Work order line item that the product was consumed for.

Usage

When a product is consumed during the completion of a work order, create a product consumed record to track its consumption. You can add products consumed to work orders or work order line items. Track product consumption at the line item level if you want to know which products were used for each line item's tasks.

The way you use products consumed depends on how closely you want to track the state of your inventory in Salesforce. If you want to track the entire lifecycle of items in your inventory, including their storage, transfer, and consumption, link your products consumed records to product items. This approach ensures that your inventory numbers auto-update to reflect the consumption of products from your inventory. If you want to track product consumption only, however, specify a Price Book Entry on each product consumed record and leave the Product Item field blank.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ProductConsumedChangeEvent (API version 48.0)

Change events are available for the object.

ProductConsumedFeed

Feed tracking is available for the object.

ProductConsumedHistory

History is available for tracked fields of the object.

ProductItem

Represents the stock of a particular product at a particular location in field service, such as all bolts stored in your main warehouse.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the product item was last modified. Its label in the user interface is Last Modified Date.
	is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the product item was last viewed.
LocationId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	Location associated with the product item. This usually indicates where the
	product item is stored.
	This is a relationship field.
	Relationship Name
	Location
	Relationship Type
	Lookup
	Refers To
	Location
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The product item's owner.
	This is a polymorphic relationship field.
	Relationship Name
	Owner

Field Name	Details
	Relationship Type
	Lookup
	Refers To
	Group, User
Product2Id	Type reference
	Properties Create, Filter, Group, Sort
	Description Product associated with the product item, which represents the type of product in your inventory.
	This is a relationship field.
	Relationship Name Product2
	Relationship Type Lookup
	Refers To Product2
ProductItemNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description (Read Only) Auto-generated number identifying the product item.
ProductName	Type string
	Properties Filter, Group, Nillable, Sort
	Description A name for the product item. Try to select a name that indicates what is being stored where; for example, Batteries in Warehouse A.
QuantityOnHand	Туре
	double
	Properties Create, Filter, Sort, Update

Field Name	Details
	Description The quantity at the location. If you want to add a serial number, this value must be 1.
QuantityUnitOfMeasure	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Units of the product item; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
SerialNumber	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description A unique number for identification purposes. If you want to enter a serial number, the Quantity on Hand must be 1.

Usage

Each product item is associated with a product and a location in Salesforce. If a product is stored at multiple locations, the product will be tracked in a different product item for each location.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ProductItemChangeEvent (API version 48.0)

Change events are available for the object.

ProductItemFeed

Feed tracking is available for the object.

ProductItemHistory

History is available for tracked fields of the object.

Product Item Owner Sharing Rule

Sharing rules are available for the object.

ProductItemShare

Sharing is available for the object.

ProductItemTransaction

Represents an action taken on a product item in field service. Product item transactions are auto-generated records that help you track when a product item is replenished, consumed, or adjusted.

Supported Calls

create(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(),
update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description A description of the transaction. The description is blank when the transaction record is created, but can be updated.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
ProductItemId	Type reference

Field Name	Details
	Properties Create, Filter, Group, Sort
	Description
	The associated product item.
	This is a relationship field.
	Relationship Name ProductItem
	Relationship Type Lookup
	Refers To ProductItem
ProductItemTransactionNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description (Read Only) Auto-generated number identifying the product item transaction.
Quantity	Type double
	Properties Create, Filter, Sort
	Description The quantity of the product item involved in the transaction. If inventory was consumed, the quantity is negative.
RelatedRecordId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description (Read Only) The product consumed or product transfer related to the action. If the action wasn't related to consumption or transfer, the related record is blank.
	This is a polymorphic relationship field.
	Relationship Name RelatedRecord
	Relationship Type Lookup
	Refers To ProductTransfer, Visit

Field Name	Details
TransactionType	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort
	Description The action that the transaction tracks.
	 Replenished: When a part is stocked at a location. A Replenished transaction is created when a product item is created.
	 Consumed: When parts are consumed to complete a work order. A Consumed transaction is created when a record is added to the Products Consumed related list on a work order or work order line item.
	 Adjusted: When there is a discrepancy or a change in consumption. An Adjusted transaction is created when a product item's Quantity on Hand is edited, a product consumed is updated or delete, or a product transfer is deleted.
	Transferred: When parts are transferred between locations.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

Product Item Transaction Feed

Feed tracking is available for the object.

Product Item Transaction History

History is available for tracked fields of the object.

ProductRequest

Represents an order for a part or parts in field service.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Authenticated external users can create and update ProductRequest objects.

Field Name	Details
AccountId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The account associated with the product request.
	This is a relationship field.
	Relationship Name
	Account
	Relationship Type
	Lookup
	Refers To
	Account
CareProgramEnrolleeId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the care program enrollee associated with the product request. This field is available from API version 49.0 and later.
	This is a relationship field.
	Relationship Name
	CareProgramEnrollee
	Relationship Type
	Lookup
	Refers To
	CareProgramEnrollee
CaseId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The case associated with the product request.
	This is a relationship field.
	Relationship Name
	Case

Field Name	Details
	Relationship Type
	Lookup
	Refers To
	Case
CurrencyIsoCode	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization. The label in the user interface is Currency ISO Code.
Description	Туре
	textarea
	Properties Create, Nillable, Update
	Description A text field for details not recorded in the provided fields.
DestinationLocationId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Where the product is delivered.
	This is a relationship field.
	Relationship Name DestinationLocation
	Relationship Type
	Lookup
	Refers To
	Location
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort

Field Name	Details
	Description The date when the product request was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the product request was last viewed.
NeedByDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description Date the product must be delivered by.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The owner of the shipment.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ProductRequestNumber	Туре
	string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description An auto-assigned number that identifies the shipment.
ShipToAddress	Type address

Field Name	Details
	Properties
	Filter, Nillable
	Description
	The address that the product is to be delivered to.
ShipToCity	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The city that the product is to be delivered to.
ShipToCountry	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The country that the product is to be delivered to.
ShipToGeocodeAccuracy	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The accuracy of the geocode for the shipping address.
ShipToLatitude	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The latitude of the location where the product is to be delivered to.
ShipToLongitude	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The longitude of the location where the product is to be delivered to.

Field Name	Details
ShipToPostalCode	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The postal code of the address where the product is to be delivered to.
ShipToState	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the state where the product is to be delivered to.
ShipToStreet	Туре
	textarea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The street address where the product is to be delivered to.
ShipmentType	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The type of shipment. The picklist includes the following values by default:
	 None
	Rush
	Overnight
	<u> </u>
	Next Business Day
	Pick Up
SourceLocationId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The location the product is shipped from.
	This is a relationship field.
	<u>'</u>

Field Name	Details
	Relationship Name SourceLocation
	Relationship Type Lookup
	Refers To Location
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description Status of the product transfer.
WorkOrderId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The work order that the product request is related to.
	This is a relationship field.
	Relationship Name WorkOrder
	Relationship Type Lookup
	Refers To WorkOrder
WorkOrderLineItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The work order line item that the product request is related to.
	This is a relationship field.
	Relationship Name WorkOrderLineItem
	Relationship Type Lookup
	Refers To WorkOrderLineItem

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ProductRequestChangeEvent (API version 48.0)

Change events are available for the object.

ProductRequestFeed

Feed tracking is available for the object.

ProductRequestHistory

History is available for tracked fields of the object.

Product Request Owner Sharing Rule

Sharing rules are available for the object.

ProductRequestShare

Sharing is available for the object.

ProductRequestLineItem

Represents a request for a part in field service. Product request line items are components of product requests.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
AccountId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The account associated with the product request line item.
	This is a relationship field.
	Relationship Name Account
	Relationship Type Lookup
	Refers To Account

Field Name	Details
CareProgramEnrolleeId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the care program enrollee associated with the product request line item. This field is available from API version 49.0 and later.
	This is a relationship field.
	Relationship Name CareProgramEnrollee
	Relationship Type Lookup
	Refers To CareProgramEnrollee
CaseId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The case associated with the product request line item.
	This is a relationship field.
	Relationship Name Case
	Relationship Type Lookup
	Refers To Case
Description	Type textarea
	Properties Create, Nillable, Update
	Description
	Details not recorded in the provided fields.
DestinationLocationId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	Where the product is delivered.
	This is a relationship field.
	Relationship Name DestinationLocation
	Relationship Type Lookup
	Refers To Location
LastReferencedDate	Туре
	dateTime
	Properties 5th Nill LL Co.
	Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related
	to this record, or a list view.
LastViewedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this
	value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
NeedByDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description Date the product must be delivered by.
ParentId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The product request that the line item belongs to.
	This is a relationship field.

Field Name	Details
	Relationship Name
	Parent Relationship Type
	Lookup
	Refers To
	ProductRequest
Product2Id	Туре
	reference
	Properties Create, Filter, Group, Sort, Update
	Description
	The product associated with the product request line item.
	This is a relationship field.
	Relationship Name Product2
	Relationship Type
	Lookup
	Refers To Product2
ProductRequestLineItemNumber	Туре
	string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	(Read Only) An auto-assigned number that identifies the product request line item.
QuantityRequested	Туре
	double
	Properties
	Create, Filter, Sort, Update
	Description The amount requested.
QuantityUnitOfMeasure	Tyne
···	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Units of the requested product; for example, grams, liters, or units. The picklist values can be customized.
ShipToAddress	Type address
	Properties Filter, Nillable
	Description The physical address where the product is needed.
ShipToCity	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The city of the address where the product is needed.
ShipToCountry	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The country of the address where the product is needed.
ShipToGeocodeAccuracy	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Accuracy level of the geocode for the address where the product is needed. See Compound Field Considerations and Limitations for details on geolocation compound fields.
	Note: This field is available in the API only.
ShipToLatitude	Type double
	Properties Create, Filter, Nillable, Sort, Update

Field Name	Details
	Description Used with Longitude to specify the precise geolocation of the address where the product is needed. Acceptable values are numbers between –90 and 90 with up to 15 decimal places. See Compound Field Considerations and Limitations for details on geolocation compound fields.
	Note: This field is available in the API only.
ShipToLongitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with Latitude to specify the precise geolocation of the address where the product is needed. Acceptable values are numbers between –180 and 180 with up to 15 decimal places. See Compound Field Considerations and Limitations for details on geolocation compound fields.
	Note: This field is available in the API only.
ShipToPostalCode	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The postal code of the address where the product is needed.
ShipToState	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The state of the address where the product is needed.
ShipToStreet	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The street of the address where the product is needed.
ShipmentType	Type picklist

Field Name	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The type of shipment. The picklist includes the following values, which can be customized:
	• Rush
	• Overnight
	• Next Business Day
	• Pick Up
SourceLocationId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	Where the product is at the time of the request.
	This is a relationship field.
	Relationship Name SourceLocation
	Relationship Type
	Lookup
	Refers To Location
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The status of the shipment. The picklist includes the following values, which car be customized:
	• Draft
	• Submitted
	• Received
WorkOrderId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description The work order for which the product is needed.
	This is a relationship field.
	Relationship Name WorkOrder
	Relationship Type Lookup
	Refers To WorkOrder
WorkOrderLineItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The work order line item for which the product is needed.
	This is a relationship field.
	Relationship Name WorkOrderLineItem
	Relationship Type Lookup
	Refers To WorkOrderLineItem

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ProductRequestLineItemChangeEvent (API version 48.0)

Change events are available for the object.

Product Request Line Item Feed

Feed tracking is available for the object.

Product Request Line Item History

History is available for tracked fields of the object.

ProductRequired

Represents a product that is needed to complete a work order or work order line item in field service.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the product required was last modified. Its label in the user
	interface is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the product required was last viewed.
ParentRecordId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The work order or work order line item that the product is required for.
	This is a polymorphic relationship field.
	Relationship Name
	ParentRecord
	Relationship Type Lookup
	Refers To
	Visit, WorkOrder, WorkOrderLineItem, WorkType
ParentRecordType	Туре
	string

Field Name	Details
	Properties
	Filter, Group, Nillable, Sort
	Description
	Indicates whether the parent record is a work order or a work order line item.
Product2Id	Туре
	reference
	Properties
	Create, Filter, Group, Sort, Update
	Description The required product
	The required product.
	This is a relationship field.
	Relationship Name Product2
	Relationship Type Lookup
	Refers To
	Product2
ProductName	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	The name of the product required.
ProductRequiredNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	(Read only) Auto-generated number identifying the product required.
QuantityRequired	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Quantity required of the product.

Field Name	Details
QuantityUnitOfMeasure	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Units of the required product; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.

Required products can be added to work types, work orders, and work order line items to ensure that the assigned service resource arrives with the right equipment.

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

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ProductRequiredFeed

Feed tracking is available for the object.

ProductRequiredHistory

History is available for tracked fields of the object.

ProductServiceCampaign

Represents a set of activities to be performed on a product service campaign asset, such as a product recall for safety issues or product defects. This object is available in API version 51.0 and later.

Supported Calls

create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),undelete(),update(),upsert()

Special Access Rules

Field Service must be enabled.

Field	Details
Description	Туре
	textarea
	Properties Create, Nillable, Update
	Description
	Description of the product service campaign.
EndDate	Туре
	date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The date on which the product service campaign ends.
LastReferencedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description The date and time that the asset was last modified. The UI label is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description
	The date and time that the asset was last viewed.
OwnerId	Туре
	reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The product service campaign's owner. By default, the product service campaign owner is the user who created the product service campaign record. The UI label is Product Service Campaign Owner.
Priority	Туре
	picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The priority of the product service campaign.
	Possible values are:
	• Critical
	• High
	• Low
	• Medium
Product2Id	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	ID of the Product2 associated with this campaign. The UI label is Product.
ProductServiceCampaignName	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description The name of the product service campaign.
StartDate	Туре
	date
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The date on which the product service campaign starts.
Status	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description The status of the product service campaign. The picklist includes the following values, which
	The status of the product service campaign. The picklist includes the following values, which can be customized:
	 New—Product service campaign created, but there hasn't yet been any activity.
	 In Progress—Product service campaign has begun.

Details Field On Hold—Work is paused. Completed—Work is complete. Cannot Complete—Work couldn't be completed. Closed—All work and associated activity is complete. Canceled—Work is canceled, typically before any work began. StatusCategory Type picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort Description The category that each Status value falls into. The StatusCategory field has eight default values: seven values that are identical to the default Status values, and None for statuses without a status category. If you create custom Status values, you must indicate which category it belongs to. For example, if you create a Waiting for Response value, add it the On Hold category. To learn which processes reference StatusCategory, see How are Status Categories Used? Type Type picklist **Properties** Create, Filter, Group, Sort, Update Description The type of the product service campaign. The picklist includes the following values, which can be customized: Modification—The asset requires an on-site alteration. Recall—The asset must be returned to the manufacturer for modification or upgrade. Service—The asset needs to be serviced. Upgrade—The asset needs updating. WorkTypeId Type reference **Properties** Create, Filter, Group, Nillable, Sort, Update Description The work type associated with the product service campaign. A customer uses this field as

Duration, Duration Type, and required skills.

a guide when setting work type for work orders for the product service campaign.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

Product Service Campaign Feed

Feed tracking is available for the object.

Product Service Campaign History

History is available for tracked fields of the object.

Product Service Campaign Owner Sharing Rule

Sharing rules are available for the object.

Product Service Campaign Share

Sharing is available for the object.

ProductServiceCampaignItem

Represents a product service campaign's asset. This object is available in API version 51.0 and later.

Supported Calls

create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),undelete(),update(),upsert()

Special Access Rules

Field Service must be enabled.

Field	Details
AssetId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The asset associated with the product service campaign. Must be present if Product2Id is not present.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date and time that the asset was last modified. Its UI label is Last Modified Date.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort
	Description
	The date and time that the asset was last viewed.
Product2Id	Type
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the Product2 associated with this campaign. The UI label is Product. Must be present if AssetID is not present.
ProductServiceCampaignId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	Required. The item's parent product service campaign record.
ProductServiceCampaignItemNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The ID of the product service campaign item.
Status	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The status of the product service campaign item. The picklist includes the following values, which can be customized:
	• New—Product service campaign item created, but there hasn't yet been any activity.
	 In Progress—Product service campaign item has begun.
	 On Hold—Product service campaign item is paused.
	Completed—Product service campaign item is complete.
	 Cannot Complete—Product service campaign item couldn't be completed.
	 Closed—All product service campaign item and associated activity is complete.

Field	Details	
	 Canceled—Product service campaign item is canceled, typically before any work began. 	
StatusCategory	Type picklist	
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort	
	Description The category that each Status value falls into. The StatusCategory field has eight default values: seven values that are identical to the default Status values, and None for statuses without a status category.	
	If you create custom Status values, you must indicate which category it belongs to. For example, if you create a Waiting for Response value, add it to the On Hold category. To learn which processes reference StatusCategory, see How are Status Categories Used?	

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ProductServiceCampaignItemFeed

Feed tracking is available for the object.

Product Service Campaign Item History

History is available for tracked fields of the object.

Product Service Campaign Item Owner Sharing Rule

Sharing rules are available for the object.

Product Service Campaign Item Share

Sharing is available for the object.

ProductServiceCampaignItemStatus

Represents a status for a product service campaign item in field service. This object is available in API version 51.0 and later.

Supported Calls

describeSObjects(), query(), retrieve()

Special Access Rules

Field Service must be enabled.

Fields

Field	Details
ApiName	Туре
	string
	Properties
	Filter, Group, idLookup, Sort
	Description
	The API name of the status value.
IsDefault	Туре
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	Indicates that the status value is the default status on product service campaign items when
	true. Only one status value can be the default.
MasterLabel	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	The label for the picklist value in the UI.
SortOrder	Туре
	int
	Properties
	Filter, Group, Nillable, Sort
	Description
	The value's position in the dropdown list in the UI.
StatusCode	Туре
	picklist
	Properties
	Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description
	The status category that the value corresponds to. The Status Category field has seven values
	that are identical to the default Status values.

Usage

The Status field on product service campaign items comes with the following values:

- New—Product service campaign item created, but there hasn't been any activity.
- In Progress—Work has begun.
- On Hold—Work is paused.
- Completed—Work is complete.
- Cannot Complete—Work couldn't be completed.
- Closed—All work and associated activity is complete.
- Canceled—Work is canceled, typically before any work began.

The ProductServiceCampaignItemStatus object corresponds to the Status field. Adding a value to the Status field—for example, Canceled By Supplier—creates a product service campaign item status record, and vice versa.



Note: Product service campaign items also come with a Status Category field whose values are identical to the default status values. If you create custom status values, you must indicate which category it belongs to. For example, if you create a <code>Customer</code> <code>Absent</code> value, add it to the <code>Cannot</code> <code>Complete</code> category. To learn which processes reference StatusCategory, see How are Status Categories Used?

ProductServiceCampaignStatus

Represents a status for a product service campaign in field service. This object is available in API version 51.0 and later.

Supported Calls

describeSObjects(), query(), retrieve()

Special Access Rules

Field Service must be enabled.

Field	Details
ApiName	Type string
	Properties Filter, Group, idLookup, Sort
	Description The API name of the status value.
IsDefault	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates that the status value is the default status on product service campaigns when true. Only one status value can be the default.

Field	Details
MasterLabel	Type string
	Properties Filter, Group, Nillable, Sort
	Description The label for the picklist value in the UI.
SortOrder	Type int
	Properties Filter, Group, Nillable, Sort
	Description The value's position in the dropdown list in the UI.
StatusCode	Type picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The status category that the value corresponds to. The Status Category field has seven values that are identical to the default Status values.

The Status field on product service campaigns comes with the following values:

- New—Product service campaign created, but there hasn't been any activity.
- In Progress—Work has begun.
- On Hold—Work is paused.
- Completed—Work is complete.
- Cannot Complete—Work couldn't be completed.
- Closed—All work and associated activity is complete.
- Canceled—Work is canceled, typically before any work began.

The ProductServiceCampaignStatus object corresponds to the Status field. Adding a value to the Status field—for example, Canceled By Supplier—creates a product service campaign status record, and vice versa.



Note: Product service campaigns also come with a Status Category field whose values are identical to the default status values. If you create custom status values, you must indicate which category it belongs to. For example, if you create a <code>Customer</code>

*Absent value, add it to the <code>Cannot Complete</code> category. To learn which processes reference StatusCategory, see How are Status Categories Used?

ProductTransfer

Represents the transfer of inventory between locations in field service.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	Details not recorded in the provided fields.
DestinationLocationId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The place the product is to be delivered.
	This is a relationship field.
	Relationship Name
	DestinationLocation
	Relationship Type
	Lookup
	Refers To
	Location
ExpectedPickupDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Date the product is expected to be picked up.

Field Name	Details
IsReceived	Туре
	boolean
	Properties 5th Control of the Contro
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description Checkbox identifying that the product was received.
LastReferencedDate	Туре
	dateTime
	Properties Filter Nillable Cort
	Filter, Nillable, Sort
	Description The date when the product request was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description The date when the product request was last viewed.
OwnerId	Туре
	reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Owner of the product transfer.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To
	Group, User
Product2Id	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Lookup field for the product associated with the product transfer.
	This is a relationship field.
	Relationship Name Product2
	Relationship Type Lookup
	Refers To Product2
ProductRequestId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description Lookup field for the product request associated with the product transfer.
	This is a relationship field.
	Relationship Name ProductRequest
	Relationship Type Lookup
	Refers To ProductRequest
ProductRequestLineItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Lookup field for the product request line item associated with the product transfer. This is a relationship field.
	Relationship Name ProductRequestLineItem
	Relationship Type Lookup
	Refers To ProductRequestLineItem
ProductTransferNumber	Type string

Field Name	Details
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-assigned number that identifies the product transfer.
QuantityReceived	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Amount of product received at the destination location.
QuantitySent	Туре
	double
	Properties
	Create, Filter, Sort, Update
	Description
	Amount of product sent from the source location.
QuantityUnitOfMeasure	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The units of the product, for example grams, liters, or units.
ReceivedById	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Lookup field for the contact who received the product at the destination location.
	This is a polymorphic relationship field.
	Relationship Name
	ReceivedBy
	Relationship Type
	Lookup
	Refers To
	Group, User

Field Name	Details
ReturnOrderId	Type reference
	Properties
	Filter, Group, Nillable, Sort
	Description The return order associated with the product transfer.
	This is a relationship field.
	Relationship Name ReturnOrder
	Relationship Type Lookup
	Refers To ReturnOrder
ReturnOrderLineItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The return order line item associated with the product transfer.
	This is a relationship field.
	Relationship Name ReturnOrderLineltem
	Relationship Type Lookup
	Refers To ReturnOrderLineItem
ShipmentExpectedDeliveryDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description Lookup field for the shipment related to the product transfer.
ShipmentId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Lookup field for the shipment related to the product transfer.

Field Name	Details
	This is a relationship field.
	Relationship Name
	Shipment
	Relationship Type Lookup
	Refers To
	Shipment
ShipmentStatus	Type picklist
	Properties
	Defaulted on create, Filter, Group, Nillable, Sort
	Description Lookup field for the shipment related to the product transfer.
ShipmentTrackingNumber	Туре
	string
	Properties Filter, Group, Nillable, Sort
	Description Lookup field for the shipment related to the product transfer.
ShipmentTrackingUrl	Туре
	url
	Properties Filter, Group, Nillable, Sort
	Description Lookup field for the shipment related to the product transfer.
SourceLocationId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	Lookup field for the source location related to the product transfer.
	This is a relationship field.
	Relationship Name SourceLocation
	Relationship Type Lookup

Field Name	Details
	Refers To Location
SourceProductItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Lookup field for the product item related to the product transfer.
	Relationship Name SourceProductItem
	Relationship Type Lookup
	Refers To ProductItem
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description Status of the product transfer.

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ProductTransferChangeEvent (API version 48.0)

Change events are available for the object.

ProductTransferFeed

Feed tracking is available for the object.

ProductTransferHistory

History is available for tracked fields of the object.

Product Transfer Owner Sharing Rule

Sharing rules are available for the object.

Product Transfer Share

Sharing is available for the object.

ProductWarrantyTerm

Defines the relationship between a product or product family and warranty term. This object is available in API version 50.0 and later.

Supported Calls

create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),undelete(),update(),upsert()

Field	Details
CoveredProductFamily	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The product family that the warranty term applies to.
CoveredProductId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the product that the warranty term applies to.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the product warranty term was last modified. Its label in the user interface
	is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the product warranty term was last viewed.
ProductWarrantyTermNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The identifier for this product warranty term.

Field	Details
WarrantyTermId	Type reference
	Properties Create, Filter, Group, Sort
	Description The ID of the warranty term.

RecordsetFilterCriteria

Represents a set of filters that can be used to match service appointments or assets based on your criteria fields. For example, you can create recordset filter criteria so that only service appointments that satisfy the filter criteria are matched to the filtered shifts, and likewise only maintenance work rules that satisfy your criteria are matched to assets. This object is available in API version 50.0 and later. Assets and maintenance work rules are available in API version 52.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field	Details
Description	Type textarea
	Properties Create, Nillable, Update
	Description The description of the recordset filter criteria.
FilteredObject	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort
	Description The object used to define the filter criteria. Available in API version 52.0 or later.
	Possible values are:
	AssetServiceAppointment

Field	Details
IsActive	Туре
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the recordset filter criteria is associated with shifts or maintenance work rules (true) or not (false).
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the recordset filter criteria was last referenced.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the recordset filter criteria was last viewed.
LogicalOperator	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Defines the logic to evaluate multiple recordset filter criteria rules. Available in API version
	53.0 and later.
	Possible values are:
	• AND
	• OR
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the recordset filter criteria.

Field	Details
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The owner of the recordset filter criteria.
SourceObject	Туре
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	The source object that the filtered criteria are applied to. Shifts and maintenance work rules are available in API version 52.0 and later. Appointment bundle objects are available in API version 53.0 and later.
	Possible values are:
	 ApptBundleAggrPolicy—Appointment Bundle Aggregation Policy
	ApptBundleConfig—Appointment Bundle Config
	• Shift
	• MaintenanceWorkRule

Let's say an employee is open to working a 9 am to 5 pm shift on a Sunday but only for emergency appointments. In this case, the SourceObject is Shift and the FilteredObject is ServiceAppointment. The service appointments available for that shift are filtered for emergency appointments using the RecordsetFilterCriteriaRule object.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

Record set Filter Criteria Feed

Feed tracking is available for the object.

Record set Filter Criteria History

History is available for tracked fields of the object.

Record set Filter Criteria Owner Sharing Rule

Sharing rules are available for the object.

Record set Filter Criteria Share

Sharing is available for the object.

RecordsetFilterCriteriaRule

Represents a rule using fields from the designated source object to create filters on the filtered, or target, object. RecordsetFilterCriteriaRule is associated with the RecordsetFilterCriteria object. This object is available in API version 50.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field	Details
CriteriaField	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	Description The field the filter rule is applied to. Asset fields are available in API version 52.0 and later.
	Possible values are derived from the source object's standard and custom fields. Possible standard source objects are Asset and ServiceAppointment. The format is, for example, Asset. AccountId or ServiceAppointment. AccountId. All standard and custom fields are allowed except those with these field types:
	• encryptedstring
	multipicklist
	• textarea
	• url
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the recordset filter criteria rule was last referenced.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort

Field	Details
	Description The date when the recordset filter criteria rule was last viewed.
Operator	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description The relational operator between CriteriaField and Value. Available in API version 52.0 or later.
	Possible values are:
	• Equals—Default
	• GreaterOrEqual
	• GreaterThan
	• LessOrEqual
	• LessThan
RecordsetFilterCriteriaId	Type reference
	Properties Create, Filter, Group, Sort
	Description The ID of the RecordsetFilterCriteria record to associate this rule with.
RecordsetFilterCriteriaRuleNumber	Туре
	string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The automatically assigned number of the recordset filter criteria rule.
Value	Type textarea
	Properties Create, Nillable, Update
	Description The expected value of CriteriaField applied to the filter rule.

If you want to create a filter rule for service appointments with a dispatched status, set CriteriaField to ServiceAppointment. Status and Value to Dispatched. Then add the ID from a RecordsetFilterCriteria record to RecordsetFilterCriteriaId to associate this rule with a filter criteria for shifts.

ResourceAbsence

Represents a time period in which a service resource is unavailable to work in Field Service, Salesforce Scheduler, or Workforce Engagement. This object is available in API version 38.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()

Special Access Rules

Field Service or Workforce Engagement must be enabled.

Field Name	Details
AbsenceNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description (Read only) An auto-generated number identifying the absence.
Address	Type address
	Properties Filter
	Description The compound form of the address associated with the absence.
City	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The city of the address associated with the absence. Maximum length is 40 characters.

Field Name	Details
Country	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The country of the address associated with the absence. Maximum length is 80 characters.
Description of the second of t	Characters.
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	The description of the absence.
End	Туре
	dateTime
	Properties
	Create, Filter, Sort, Update
	Description
	The date and time when the absence ends.
GeocodeAccuracy	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The level of accuracy of a location's geographical coordinates compared with its physical address. Usually provided by a geocoding service based on the address's latitude and longitude coordinates.
	Note: This field is available in the API only.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the resource absence was last modified. Its label in the user interface is Last Modified Date.

Field Name	Details
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the resource absence was last viewed.
Latitude	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Used with Longitude to specify the precise geolocation of the address
	associated with the absence. Acceptable values are numbers between –90 and
	90 with up to 15 decimal places.
	Note: This field is available in the API only.
Longitude	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Used with Latitude to specify the precise geolocation of the address
	associated with the absence. Acceptable values are numbers between –180 and
	180 with up to 15 decimal places.
	Note: This field is available in the API only.
Postal Code	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The postal code of the address associated with the absence. Maximum length is
	20 characters.
ResourceId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The absent service resource.

Field Name	Details
	This is a relationship field.
	Relationship Name
	Resource
	Relationship Type
	Lookup
	Refers To
	ServiceResource
Start	Туре
	dateTime
	Properties
	Create, Filter, Sort, Update
	Description
	The date and time when the absence begins.
State	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The state of the address associated with the absence. Maximum length is 80
	characters.
Street	Туре
	textarea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The street number and name of the address associated with the absence.
Туре	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The type of absence: Meeting, Training, Medical, or Vacation. The
	default value is <i>Vacation</i> . You can add custom values if needed, but the name
	Break is reserved for the Field Service managed package.

Resource absences you define periods of time when a service resource is unavailable to work. Unless you're using the Field Service managed package, service resources can still be assigned to appointments that conflict with their absences.



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

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

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ResourceAbsenceChangeEvent (API version 48.0)

Change events are available for the object.

ResourceAbsenceFeed

Feed tracking is available for the object.

ResourceAbsenceHistory

History is available for tracked fields of the object.

ResourcePreference

Represents an account's preference for a specified service resource on field service work.

Resource preferences indicate which service resources should be assigned to field service work. You can designate service resources as preferred, required, or excluded on specific accounts or work orders. Work orders inherit their associated account's resource preferences.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the resource preference was last modified.
LastViewedDate	Type dateTime

Field Name	Details
	Properties Filter, Nillable, Sort
	Description The date when the resource preference was last viewed.
PreferenceType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Resource preference type. Values include:
	 Preferred: Indicates that the customer would like their field service work assigned to the resource
	 Required: Indicates that the resource must be assigned to the customer's field service work
	 Excluded: Indicates that the customer does not want their field service work assigned to the resource
	Resource preferences serve more as a suggestion than a requirement. You can still assign a service appointment to any resource regardless of the related work order's resource preferences.
RelatedRecordId	Type reference
	Properties Create, Filter, Group, Sort
	Description
	The work order or account with the resource preference.
	This is a polymorphic relationship field.
	Relationship Name RelatedRecord
	Relationship Type Lookup
	Refers To Account, WorkOrder
ResourcePreferenceNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, Sort
	Description An auto-generated number identifying the resource preference.

Field Name	Details
ServiceResourceId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The service resource that is preferred, required, or excluded.
	This is a relationship field.
	Relationship Name ServiceResource
	Relationship Type Lookup
	Refers To ServiceResource

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ResourcePreferenceFeed

Feed tracking is available for the object.

ResourcePreferenceHistory

History is available for tracked fields of the object.

ReturnOrder

Represents the return or repair of inventory or products in Field Service, or the return of order products in Order Management. This object is available in API version 42.0 and later.

Return orders are available in Lightning Experience, Salesforce Classic, the Salesforce mobile app, the Field Service mobile app for Android and iOS, and communities built using Salesforce Tabs + Visualforce.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service or Order Management must be enabled. If return orders are enabled by a Salesforce Order Management license, they must be created with a Status corresponding to the Status Category Activated. The default Statuses corresponding to Activated are Submitted and Approved.

Field Name	Details
AccountId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The account associated with the return order.
	This is a relationship field.
	Relationship Name Account
	Relationship Type Lookup
	Refers To
	Account
CaseId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The case associated with the return order.
	This is a relationship field.
	Relationship Name
	Case
	Relationship Type Lookup
	Refers To
	Case
ContactId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The contact associated with the return order.
	This is a relationship field.
	Relationship Name Contact
	Relationship Type Lookup

Field Name	Details
	Refers To
	Contact
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	Notes or context about the return order.
DestinationLocationId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The location where the items are being returned to. For example, if the return
	order tracks the return of products from a technician's van to a warehouse, the
	warehouse is the destination location.
	This is a relationship field.
	Relationship Name
	DestinationLocation
	Relationship Type
	Lookup
	Refers To
	Location
ExpectedArrivalDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date when the items are expected to arrive at the destination location.
ExpirationDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Authorizations can't be captured after their expiration dates.
	This field is available in API version 50.0 and later.

Field Name	Details
GrandTotalAmount	Type currency
	Properties Filter, Nillable, Sort
	Description Total, including adjustments and tax, of the products and delivery charges on the return order. This includes all return order line items associated with the return order. This amount is equal to TotalAmount + TotalTaxAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the return order was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the return order was last viewed.
LifeCycleType	Type picklist
	Properties Filter, Group, Nillable, Restricted picklist, Sort
	Description Specifies whether the order summary is managed by Salesforce Order Management (MANAGED) or by an external system (UNMANAGED). An unmanaged order summary is stored in Salesforce for reference purposes.
	 Some Order Management APIs reject input records that are associated with unmanaged order summaries.
	 Order Management does not update financial bucket fields on some records that are associated with unmanaged order summaries.
	 A user with the EditUnmanagedOrderSummaries or B2BCommerceIntegrator permission can edit certain fields on objects related to unmanaged order summaries that are normally only accessible via APIs.
	Possible values are:

Field Name	Details
	• MANAGED—Managed
	 UNMANAGED—Unmanaged
	This field is available in API version 50.0 and later.
OrderId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The order associated with the return order. When you associated a return order with an order, you can associate the return order's line items with order products.
	This is a relationship field.
	Relationship Name Order
	Relationship Type Lookup
	Refers To
	Order
OrderSummaryId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort
	Description
	ID of the order summary associated with the return order.
	This field is available in API version 50.0 and later.
OwnerId	Туре
	reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The owner of the return order.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User

Details
Туре
reference
Properties Create, Filter, Group, Nillable, Sort, Update
Description The product request associated with the return order. When you associated a return order with a product request, you can associate the return order's line items with the product request's line items.
A return order might be related to a product request if the return order tracks the return of unused products or products to be repaired or replaced. For example, a technician creates a product request for three motors to prepare for a field visit. If the technician finds that only two motors are needed, they can create a return order to return the third to the original location, and list the product request in this field.
This is a relationship field.
Relationship Name ProductRequest
Relationship Type Lookup
Refers To ProductRequest
This field is available only if Field Service or Health Cloud is enabled.
Type reference
Properties
Create, Filter, Group, Nillable, Sort, Update
Description
The product service campaign associated with the return order
This field is available only if Field Service is enabled.
Type string
Properties
Autonumber, Defaulted on create, Filter, idLookup, Sort
Description
(Read only) Auto-generated number identifying the return order.
Type reference

Details
Properties
Create, Filter, Group, Nillable, Sort, Update
Description ID of the user returning the items.
This is a relationship field.
Relationship Name ReturnedBy
Relationship Type
Lookup
Refers To
User
Туре
address
Properties Filter, Nillable
Description
The return shipping address. This address tracks the location of the items at the start of the return or repair. For example, if a customer is returning an item, the Ship From address is the customer's address.
Туре
string
Properties
Create, Filter, Group, Nillable, Sort, Update
Description
The city of the return shipping address. This address tracks the location of the items at the start of the return or repair. For example, if a customer is returning an item, the Ship From address is the customer's address.
Туре
string
Properties
Create, Filter, Group, Nillable, Sort, Update
Description
The country of the return shipping address. This address tracks the location of the items at the start of the return or repair. For example, if a customer is returning an item, the Ship From address is the customer's address.
Туре

ShipFromState

Details Field Name Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Accuracy level of the geocode for the return shipping address. See Compound Field Considerations and Limitations for details on geolocation compound fields. Note: This field is available in the API only. ShipFromLatitude Type double **Properties** Create, Filter, Nillable, Sort, Update Description Used with Longitude to specify the precise geolocation of the return shipping address. Acceptable values are numbers between -90 and 90 with up to 15 decimal places. See Compound Field Considerations and Limitations for details on geolocation compound fields. Note: This field is available in the API only. ShipFromLongitude Type double **Properties** Create, Filter, Nillable, Sort, Update Description Used with Latitude to specify the precise geolocation of the return shipping address. Acceptable values are numbers between -180 and 180 with up to 15 decimal places. See Compound Field Considerations and Limitations for details on geolocation compound fields. **Note**: This field is available in the API only. ShipFromPostalCode Type string **Properties** Create, Filter, Group, Nillable, Sort, Update Description The postal code of the return shipping address. This address tracks the location

string

Type

of the items at the start of the return or repair. For example, if a customer is returning an item, the Ship From address is the customer's address.

Field Name	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The state of the return shipping address. This address tracks the location of the items at the start of the return or repair. For example, if a customer is returning an item, the Ship From address is the customer's address.
ShipFromStreet	Туре
	textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The street of the return shipping address. This address tracks the location of the items at the start of the return or repair. For example, if a customer is returning an item, the Ship From address is the customer's address.
ShipmentType	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The type of shipment associated with the return order. Available values are:
	Standard (default value)
	• Rush
	• Overnight
	Next Business Day
	• Pick Up
SourceLocationId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The items' location at the start of the return or repair. For example, if the return order tracks the return of products from a technician's service vehicle to a warehouse, the service vehicle is the source location.
	This is a relationship field.
	Relationship Name SourceLocation
	Relationship Type Lookup

Field Name	Details
	Refers To Location
Status	Туре
	picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The status of the return order. Available values are:
	• Draft
	• Submitted
	• Approved
	• Canceled
	• Closed
	If return orders are enabled by a Salesforce Order Management license, they must be created with a Status corresponding to the Status Category Activated. The default Statuses corresponding to Activated are Submitted and Approved.
StatusCategory	Type
	picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description Status category of the return order. Processing of the return order depends on this value. Each status category corresponds to one or more statuses.
	Possible values are:
	• Activated
	• Canceled
	• Closed
	• Draft
	This field is available in API version 50.0 and later.
TaxLocaleType	Туре
	picklist
	Properties Filter, Group, Nillable, Restricted picklist, Sort
	Description The system used to handle tax on the original order associated with the return order. Gross usually applies to taxes like value-added tax (VAT), and Net usually applies to taxes like sales tax.

Field Name	Details
	Possible values are:
	 Gross (displays most prices and taxes as combined values)
	 Net (displays most prices and taxes as separate values)
	This field is available in API version 50.0 and later.
TotalAmount	Type currency
	Properties Filter, Nillable, Sort
	Description Adjusted total, not including tax, of the return order line items, including products and delivery charges, on the ReturnOrder.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalDeliveryAdjustAmount	Type currency
	Properties Filter, Nillable, Sort
	Description Total amount of the price adjustments applied to the delivery charges on the return order. This value only includes adjustments to return order line items of type code Charge.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalDeliveryAdjustAmtWithTax	Type currency
	Properties Filter, Nillable, Sort
	Description Total amount of the price adjustments applied to the delivery charges on the return order, inclusive of tax. This value only includes adjustments to return order line items of type code Charge. This amount is equal to TotalDeliveryAdjustAmount + TotalDeliveryAdjustTaxAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalDeliveryAdjustTaxAmount	Type currency

Field Name	Details
	Properties Filter, Nillable, Sort
	Description Tax on the TotalDeliveryAdjustmentAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalDeliveryAmount	Туре
	currency
	Properties Filter, Nillable, Sort
	Description Total of the delivery charges on the return order. This value only includes return order line items of type code Charge.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalDeliveryAmtWithTax	Type currency
	Properties Filter, Nillable, Sort
	Description Total amount of the delivery charges on the return order, inclusive of tax. This value only includes return order line items of type code Charge. This amount is equal to TotalDeliveryAmount + TotalDeliveryTaxAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalDeliveryTaxAmount	Type currency
	Properties Filter, Nillable, Sort
	Description Tax on the TotalDeliveryAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalProductAdjustAmount	Type currency

Field Name	Details
	Properties
	Filter, Nillable, Sort
	Description Total amount of the price adjustments applied to the products on the return order. This value only includes adjustments to return order line items of type code Product.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalProductAdjustAmtWithTax	Туре
	currency
	Properties Filter, Nillable, Sort
	Description Total amount of the price adjustments applied to the products on the return order, inclusive of tax. This value only includes adjustments to return order line items of type code Product. This amount is equal to TotalProductAdjustAmount + TotalProductAdjustTaxAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalProductAdjustTaxAmount	Туре
	currency
	Properties Filter, Nillable, Sort
	Description
	Tax on the TotalProductAdjustmentAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalProductAmount	Туре
	currency
	Properties Filter, Nillable, Sort
	Description Total of the product charges on the return order. This value only includes return order line items of type code Product.
	This is a calculated field.
	This field is available in API version 50.0 and later.

Field Name	Details
TotalProductAmtWithTax	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	Total amount of the product charges on the return order, inclusive of tax. This value only includes return order line items of type code Product. This amount is equal to TotalProductAmount + TotalProductTaxAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalProductTaxAmount	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description Tax on the TotalProductAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalTaxAmount	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	Tax on the TotalAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.

Usage

You can use return orders to track customer returns, customer repairs, or the return of inventory from a technician's van stock to a warehouse or supplier. Customers can initiate a return from a community, or agents can create return orders in response to a customer call or technician request.

Return orders are composed of return order line items, which allow you to add details about the items being returned. To represent the returned items, each line item must list one or more of the following: product, product item, asset, product request line item, and order product. Return orders can be associated with a product request, case, account, contact, and order if needed. This versatility lets you use return orders to track a wide range of return scenarios.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ReturnOrderChangeEvent (API version 48.0)

Change events are available for the object.

ReturnOrderFeed

Feed tracking is available for the object.

ReturnOrderHistory

History is available for tracked fields of the object.

ReturnOrderOwnerSharingRule

Sharing rules are available for the object.

ReturnOrderShare

Sharing is available for the object.

ReturnOrderLineItem

Represents a specific product that is returned or repaired as part of a return order in Field service, or a specific order item that is returned as part of a return order in Order Management. This object is available in API version 42.0 and later.

Return orders are available in Lightning Experience, Salesforce Classic, the Salesforce mobile app, the Field Service mobile app for Android and iOS, and communities built using Salesforce Tabs + Visualforce.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service or Order Management must be enabled.

Field Name	Details
AssetId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The asset associated with the return order line item. One or more of the following fields must be filled out: AssetId, OrderItemId, Product2Id, ProductItemId, and ProductRequestLineItemId.
	This is a relationship field.
	Relationship Name Asset

Field Name	Details
	Relationship Type Lookup
	Refers To Asset
ChangeOrderItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort
	Description ID of the change order item associated with the return order line item.
	This field is available in API version 50.0 and later.
	This is a relationship field.
	Relationship Name ChangeOrderItem
	Relationship Type Lookup
	Refers To OrderItem
Description	Type textarea
	Properties Create, Nillable, Update
	Description Notes or context about the return order line item.
DestinationLocationId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The location where the items are being returned to. For example, if the return order tracks the return of products from a technician's van to a warehouse, the warehouse is the destination location.
	This is a relationship field.
	Relationship Name DestinationLocation
	Relationship Type Lookup

Field Name	Details
	Refers To Location
GrossUnitPrice	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Unit price, including tax, of the product represented by the associated order item summary.
	This field is available in API version 50.0 and later.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the return order line item was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the return order line item was last viewed.
OrderItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The order product associated with the return order line item. One or more of the following fields must be filled out: AssetId, OrderItemId, Product2Id, ProductItemId, and ProductRequestLineItemId.
	This is a relationship field.
	Relationship Name Orderltem
	Relationship Type Lookup

Field Name	Details
	Refers To OrderItem
OrderItemSummaryId	Type reference
	Properties Create, Filter, Group, Nillable, Sort
	Description ID of the order item summary associated with the return order line item. This field is available in API version 50.0 and later.
ProcessingPlan	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description Indicates the preferred fate of the items following their return. Available values are:
	Repair—Repair the items and return them to the ownerDiscard—Discard the items
	Salvage—Salvage the items' working partsRestock—Return the items to your inventory
Product2Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The product associated with the return order line item. One or more of the following fields must be filled out: AssetId, OrderItemId, Product2Id, ProductItemId, and ProductRequestLineItemId.
	This is a relationship field.
	Relationship Name Product2
	Relationship Type Lookup
	Refers To Product2
ProductItemId	Type reference

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The product item representing the location of the product at the start of the return. One or more of the following fields must be filled out: AssetId, OrderItemIc Product2Id, ProductItemId, and ProductRequestLineItemId.
	This is a relationship field.
	Relationship Name ProductItem
	Relationship Type Lookup
	Refers To ProductItem
ProductRequestLineItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The product request line item associated with the return order line item. One o more of the following fields must be filled out: AssetId, OrderItemId, Product2Ic ProductItemId, and ProductRequestLineItemId.
	This is a relationship field.
	Relationship Name ProductRequestLineItem
	Relationship Type Lookup
	Refers To ProductRequestLineItem
ProductServiceCampaignId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The product service campaign associated with the return order line item.
ProductServiceCampaignItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description The product service campaign item associated with the return order line item.
QuantityExpected	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The quantity of items expected to be returned.
	This field is available in API version 50.0 and later.
QuantityReceived	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The actual quantity of items received for return.
	This field is available in API version 50.0 and later.
QuantityRejected	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The quantity of items rejected for return.
	This field is available in API version 50.0 and later.
QuantityReturned	Type double
	Properties Create, Filter, Sort, Update
	Description The quantity of items being returned. If multiple types of products are being returned, track each product in a different return order line item.
QuantityUnitOfMeasure	Туре
	picklist Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Units of the returned items; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field or products.
ReasonForRejection	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description Reason for rejecting returned items on this return order line item.
	Possible values are:
	• Damaged Item
	Expired Warranty
	Missing Item or Part
	• Wrong Item
	This field is available in API version 50.0 and later.
ReasonForReturn	Туре
	picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The reason the items are being returned. Available values are:
	• Damaged
	• Defective
	• Duplicate Order
	• Wrong Item
	 Wrong Quantity
	• Not Satisfied
	• Outdated
	• Other
RepaymentMethod	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The method by which the customer or owner will be reimbursed for the items being returned. Available values are:

Field Name	Details
	Replace—The items will be replaced
	 Refund—The items will be returned and the owner will be refunded
	 Credit—The items will be returned and the owner will receive credit for them
	 Return—The items will be returned to the owner (for example, following their repair)
ReturnOrderId	Type reference
	Properties Create, Filter, Group, Sort
	Description The return order that the return order line item belongs to.
	This is a relationship field.
	Relationship Name ReturnOrder
	Relationship Type Lookup
	Refers To ReturnOrder
ReturnOrderLineItemNumber	Type
	string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	(Read only) Auto-generated number that identifies the return order line item.
SourceLocationId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The items' location at the start of the return or repair. For example, if the return order tracks the return of products from a technician's service vehicle to a warehouse, the service vehicle is the source location.
	This is a relationship field.
	Relationship Name SourceLocation
	Relationship Type Lookup

Field Name	Details
	Refers To
	Location
TotalAdjustmentAmount	Туре
	currency
	Properties Filter, Nillable, Sort
	Description Total of all price adjustments applied to the return order line item.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalAdjustmentAmountWithTax	Туре
	Currency
	Properties Filter, Nillable, Sort
	Description
	Total amount of the price adjustments applied to the return order line item, inclusive of tax. This amount is equal to TotalAdjustmentAmount + TotalAdjustmentTaxAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalAdjustmentTaxAmount	Туре
	currency
	Properties Filter, Nillable, Sort
	Description Tax on the TotalAdjustmentAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalAmount	Туре
	currency
	Properties Filter, Nillable, Sort
	Description
	Total, including adjustments and tax, of the return order line item.
	This is a calculated field.
	This field is available in API version 50.0 and later.

Field Name	Details
TotalLineAmount	Туре
	currency
	Properties
	Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description
	Total, not including adjustments or tax, of the return order line item.
	This field is available in API version 50.0 and later.
TotalLineAmountWithTax	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	Total price of the return order line item, inclusive of tax. This amount is equal to TotalLineAmount + TotalLineTaxAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalLineTaxAmount	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	Tax on the TotalLineAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
TotalPrice	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	Total, including adjustments but not tax, of the return order line item. Equal to
	UnitPrice times Quantity.
	This is a calculated field.
TotalTaxAmount	Туре
	currency
	Properties
	Filter, Nillable, Sort

Field Name	Details
	Description
	Tax on the TotalAmount.
	This is a calculated field.
	This field is available in API version 50.0 and later.
Туре	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Type of the return order line item. Matches the type of the associated order item summary. Delivery Charge indicates that the return order line item represents a delivery charge. Order Product indicates that it represents any other type of product, service, or charge. Each type corresponds to one type code.
	Possible values are:
	Delivery Charge
	• Order Product
	This field is available in API version 50.0 and later.
TypeCode	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Type code of the return order line item. Matches the type code of the associated order item summary. Processing depends on this value. Charge indicates that the return order line item represents a delivery charge. Product indicates that it represents an other type of product, service, or charge. Each type category corresponds to one or more types.
	Possible values are:
	• Charge
	• Product
	This field is available in API version 50.0 and later.
UnitPrice	Type currency
	Properties
	Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description
	Unit price of the return order line item.

Field Name	Details
	This field is available in API version 50.0 and later.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ReturnOrderLineItemChangeEvent (API version 48.0)

Change events are available for the object.

Return Order Line I tem Feed

Feed tracking is available for the object.

ReturnOrderLineItemHistory

History is available for tracked fields of the object.

ServiceAppointment

Represents an appointment to complete work for a customer in Field Service and Lightning Scheduler. This object is available in API version 38.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
AccountId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description (Read only) The account associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent. Otherwise, it remains blank.
	This is a relationship field.
	Relationship Name Account
	Relationship Type Lookup

Field Name	Details
	Refers To
	Account
ActualDuration	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The number of minutes that it took the resource to complete the appointment after arriving at the address. When values are first added to the Actual Start and Actual End fields, the Actual Duration is automatically populated to list the difference between the Actual Start and Actual End. If the Actual Start and Actual End fields are subsequently updated, the Actual Duration field doesn't re-update, but you can manually update it.
ActualEndTime	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The actual date and time the appointment ended.
ActualStartTime	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The actual date and time the appointment started.
Address	Туре
	address
	Properties
	Filter
	Description
	The address where the appointment is taking place. The address is inherited from the parent record if the parent record is a work order or work order line item.
AppointmentNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort

Field Name	Details
	Description An auto-assigned number that identifies the appointment.
ArrivalWindowEndTime	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The end of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the Scheduled Start and End window to allow time for delays and scheduling changes. You may choose to share the Arrival Window Start and End with the customer, but keep the Scheduled Start and End internal-only.
ArrivalWindowStartTime	Type dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description The beginning of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the Scheduled Start and End window to allow time for delays and scheduling changes. You may choose to share the Arrival Window Start and End with the customer, but keep the Scheduled Start and End internal-only.
BundlePolicyId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Reference to the bundle policy associated with this service appointment.
	This is a relationship field.
	Relationship Name BundlePolicy
	Relationship Type Lookup
	Refers To ApptBundlePolicy
City	Type string

Field Name	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The city where the appointment is completed. Maximum length is 40 characters
ContactId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The contact associated with the parent record. If needed, you can manually update the service appointment contact.
	This is a relationship field.
	Relationship Name Contact
	Relationship Type Lookup
	Refers To Contact
Country	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The country where the work order is completed. Maximum length is 80 characters.
Description	Type textarea
	Properties Create, Nillable, Update
	Description The description of the appointment.
DueDate	Type dateTime
	Properties Create, Filter, Sort, Update
	Description The date by which the appointment must be completed. Earliest Start Permitted and Due Date typically reflect terms in the customer's service-level agreement.

Field Name	Details
Duration	Туре
	double
	Properties Create, Nillable, Filter, Sort, Update
	Description The estimated length of the appointment. If the parent record is work order or work order line item, the appointment inherits its parent's duration, but it can be manually updated. The duration is in minutes or hours based on the value selected in the Duration Type field.
DurationType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The unit of the Duration: Minutes or Hours.
EarliestStartTime	Type dateTime
	Properties Create, Filter, Sort, Update
	Description The date after which the appointment must be completed. Earliest Start Permitted and Due Date typically reflect terms in the customer's service-level agreement.
GeocodeAccuracy	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The level of accuracy of a location's geographical coordinates compared with its physical address. Usually provided by a geocoding service based on the address's latitude and longitude coordinates.
	Note: This field is available in the API only.
IsAnonymousBooking	Туре
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field Name	Details
	Description Indicates whether a service resource was automatically assigned to the appointment. The default value is false.
	This field is available in API version 49.0 and later.
IsBundle	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if this service appointment is a bundle service appointment. The default value is false.
	This field is available in API version 54.0 and later.
IsBundleMember	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if this service appointment is a bundle member service appointment. The default value is false.
	This field is available in API version 54.0 and later.
IsManuallyBundled	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if this bundle was created manually. The default value is false.
	This field is available in API version 54.0 and later.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the service appointment was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Type dateTime

Field Name	Details
	Properties
	Filter, Nillable, Sort
	Description
	The date when the service appointment was last viewed.
Latitude	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description Used with Longitude to specify the precise geolocation of the address where the service appointments is completed. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
	Note: This field is available in the API only.
Longitude	Туре
	double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with Latitude to specify the precise geolocation of the address where the service appointment is completed. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
	Note: This field is available in the API only.
OwnerId	Type reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The owner of the service appointment.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User

Field Name	Details
ParentRecordId	Type reference
	Properties Create, Filter, Group, Nillable, Sort
	Description The parent record associated with the appointment. The parent record can't be updated after the service appointment is created.
	This is a polymorphic relationship field.
	Relationship Name ParentRecord
	Relationship Type Lookup
	Refers To Account, Asset, Lead, Opportunity, WorkOrder, WorkOrderLineItem
ParentRecordStatusCategory	Type picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description (Read only) The Status Category of the parent record. If the parent record is a work order or work order line item, this field is populated; otherwise, it remains blank.
ParentRecordType	Type string
	Properties Filter, Group, Nillable, Sort
	Description (Read only) The type of parent record: Account, Asset, Lead, Opportunity, Work Order, or Work Order Line Item.
PostalCode	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The postal code where the work order is completed. Maximum length is 20 characters.
RelatedBundleId	Type reference

Field Name	Details
	Properties Control of the Control of
	Create, Filter, Group, Nillable, Sort, Update
	Description The bundle that this service appointment is a member of.
	This is a relationship field.
	Relationship Name RelatedBundle
	Relationship Type Lookup
	Refers To ServiceAppointment
SchedEndTime	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The time at which the appointment is scheduled to end. If you are using the Field Service managed package with the scheduling optimizer, this field is populated once the appointment is assigned to a resource. Scheduled End – Scheduled Start = Estimated Duration.
SchedStartTime	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The time at which the appointment is scheduled to start. If you are using the Field Service managed package with the scheduling optimizer, this field is populated once the appointment is assigned to a resource.
ServiceTerritoryId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The service territory associated with the appointment. If the parent record is a work order or work order line item, the appointment inherits its parent's service territory.
	This is a relationship field.
	Relationship Name ServiceTerritory

Field Name	Details
	Relationship Type
	Lookup
	Refers To
	ServiceTerritory
State	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The state where the service appointment is completed. Maximum length is 80 characters.
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The status of the appointment. The picklist includes the following values, which can be customized:
	 None—Default value.
	 Scheduled—Appointment has been assigned to a service resource.
	 Dispatched—Assigned service resource has been notified about their assignment.
	 In Progress—Work has begun.
	 Completed—Work is complete.
	 Cannot Complete—Work could not be completed.
	 Canceled—Work is canceled, typically before any work began
StatusCategory	Type picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The category that each Status value falls into. The Status Category field's values are identical to the default Status values.
	If you create custom Status values, you must indicate which category it belongs to. For example, if you create a Customer Absent value, you may decide that it belongs in the Cannot Complete category. To learn which processes reference Status Category, see How are Status Categories Used?

Field Name	Details
Street	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The street number and name where the service appointment is completed.
Subject	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A short phrase describing the appointment.
WorkTypeId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The work type associated with the service appointment. The work type is inherited from the appointment's parent record if the parent is a work order or work order line item.
	Note: If Lightning Scheduler is also in use, this field is editable. However, users see an error if they update it to list a different work type than the parent record's work type.
	This is a relationship field.
	Relationship Name WorkType
	Relationship Type Lookup
	Refers To WorkType

Usage

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

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

- Service appointments on *accounts* represent work being performed for the account.
- Service appointments on *opportunities* represent work that is related to the opportunity.
- Service appointments on *leads* represent work that is related to lead—for example, a site visit to pursue a promising lead.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceAppointmentChangeEvent (API version 48.0)

Change events are available for the object.

${\bf Service Appoint ment Feed}$

Feed tracking is available for the object.

ServiceAppointmentHistory

History is available for tracked fields of the object.

Service Appointment Owner Sharing Rule

Sharing rules are available for the object.

ServiceAppointmentShare

Sharing is available for the object.

ServiceAppointmentStatus

Represents a possible status of a service appointment in field service.

Supported Calls

describeSObjects(), query(), retrieve()

Special Access Rules

Field Service must be enabled.

Field Name	Details
ApiName	Туре
	string
	Properties Filter, Group, idLookup, Sort
	Description The API name of the status value.
IsDefault	Type boolean
	Properties Defaulted on create, Filter, Group, Sort

Field Name	Details
	Description Indicates that the status value is the default status on service appointments. Only one status value can be the default.
MasterLabel	Type string
	Properties Filter, Group, Nillable, Sort
	Description The label for the picklist value that appears in the UI.
SortOrder	Type int
	Properties Filter, Group, Nillable, Sort
	Description The value's position in the drop-down list of values in the UI.
StatusCode	Type picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The status category that the value corresponds to. The Status Category field has seven values which are identical to the default Status values.

Usage

The Status field on service appointments comes with the following values:

- None—Default value.
- Scheduled—Appointment has been assigned to a service resource.
- Dispatched—Assigned service resource has been notified about their assignment.
- In Progress—Work has begun.
- Completed—Work is complete.
- Cannot Complete—Work could not be completed.
- Canceled—Work is canceled, typically before any work began

The ServiceAppointmentStatus object corresponds to the Status field. Adding a value to the Status field—for example, Waiting—creates a service appointment status record, and vice versa.



Note: Service appointments also come with a StatusCategory field whose values are identical to the default Status values. If you create custom Status values, you must indicate which category it belongs to. For example, if you create a Customer Absent

value, you may decide that it belongs in the *Cannot Complete* category. To learn which processes reference StatusCategory, see How are Status Categories Used?

ServiceContract

Represents a customer support contract (business agreement). This object is available in API version 18.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
AccountId	Type reference
	Properties
	Filter, Group, Nillable, Sort
	Description
	ID of the account associated with the service contract.
ActivationDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The initial day the service contract went into effect (whereas StartDate may include a renewal date).
AdditionalDiscount	Туре
	percent
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Extra discount percentage for the service contract. Available in API version 55.0 and later.
ApprovalStatus	Туре
	picklist
	Properties
	Defaulted on create, Filter, Group, Nillable, Sort
	Description
	Approval status of the service contract.

Field	Details
BillingAddress (beta)	Type address Properties
	Filter, Nillable
	Description The compound form of the billing address. Read-only. See Address Compound Fields for details on compound address fields.
BillingCity	Type
	string Properties
	Filter, Group, Nillable, Sort
	Description Details for the billing address. Maximum size is 40 characters.
BillingCountry	Type string
	Properties
	Filter, Group, Nillable, Sort
	Description Details for the billing address. Maximum size is 40 characters.
BillingCountryCode	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ISO country code for the service contract's billing address.
BillingLatitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description
	Used with BillingLongitude to specify the precise geolocation of a billing address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
BillingLongitude	Type double
	Properties
	Create, Filter, Nillable, Sort, Update

Field	Details
	Description Used with BillingLatitude to specify the precise geolocation of a billing address. Acceptable values are numbers between -180 and 180 with up to 15 decimal places.
BillingPostalCode	Туре
	string
	Properties Filter, Group, Nillable, Sort
	Description Details for the billing address. Maximum size is 20 characters.
BillingState	Type string
	Properties
	Group, Sort, Filter, Nillable
	Description Details for the billing address. Maximum size is 20 characters.
BillingStateCode	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ISO state code for the service contract's billing address.
BillingStreet	Туре
	textarea Properties
	Filter, Group, Nillable, Sort
	Description Street address for the billing address.
ContactId	Туре
	reference
	Properties Filter, Group, Nillable, Sort
	Description Required. ID of the Contact associated with the service contract. Must be a valid ID.
ContractNumber	Type string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, Sort
	Description Unique number automatically assigned to the service contract.
Description	Type textarea
	Properties Nillable
	Description Description of the service contract.
Discount	Type percent
	Properties Filter, Nillable, Sort
	Description
	Discount percentage for the service contract.
EndDate	Type date
	Properties Filter, Group, Nillable, Sort
	Description The last day the service contract is in effect.
GrandTotal	Type currency
	Properties Filter, Nillable, Sort
	Description Total price of the service contract plus shipping and taxes.
IsDeleted	Type boolean
	Properties Defaulted on create, Filter
	Description Indicates whether the object has been moved to the Recycle Bin (true) or not (false). Label is Deleted .

Field	Details
LastReferencedDate	Туре
	date
	Properties
	Filter, Nillable, Sort, Update
	Description
	The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Туре
	date
	Properties
	Filter, Nillable, Sort, Update
	Description
	The timestamp when the current user last viewed this record or list view. If this value is
	null, the user might have only accessed this record or list view
	(LastReferencedDate) but not viewed it.
LineItemCount	Туре
	int
	Properties
	Filter, Nillable, Group, Sort
	Description
	Number of ContractLineItem records associated with the service contract.
Name	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Name of the service contract.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The ID of the user who currently owns the service contract.
ParentServiceContractId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The service contract's parent service contract, if it has one.
Pricebook2Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of the Pricebook2 associated with the service contract. Must be a valid ID.
RootServiceContractId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description (Read only) The top-level service contract in a service contract hierarchy. Depending on where a service contract lies in the hierarchy, its root could be the same as its parent.
ShippingAddress (beta)	Type address
	Properties Filter, Nillable
	Description The compound form of the shipping address. Read-only. See Address Compound Fields for details on compound address fields.
ShippingCity	Type string
	Properties Filter, Group, Nillable, Sort
	Description Details of the shipping address. Maximum size is 40 characters.
ShippingCountry	Type string
	Properties Filter, Group, Nillable, Sort
	Description Details of the shipping address. Country maximum size is 40 characters.
ShippingCountryCode	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ISO country code for the service contract's shipping address.
ShippingLatitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with ShippingLongitude to specify the precise geolocation of a shipping address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
ShippingLongitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with ShippingLatitude to specify the precise geolocation of an address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
ShippingPostalCode	Type string
	Properties Create, Filter, Nillable, Update
	Description Details of the shipping address. Postal code maximum size is 20 characters.
ShippingState	Type string
	Properties Create, Filter, Nillable, Update
	Description Details of the shipping address. State maximum size is 20 characters.
ShippingStateCode	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ISO state code for the service contract's shipping address.

Field	Details
ShippingStreet	Туре
	textarea
	Properties Create, Filter, Nillable, Update
	Description
	The street address of the shipping address. Maximum of 255 characters.
SpecialTerms	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	Any terms specifically agreed to and tracked in the service contract.
StartDate	Туре
	date
	Properties
	Create, Filter, Nillable, Update
	Description
	The first day the service contract is in effect.
Status	Туре
	picklist
	Properties
	Filter, Nillable
	Description
	The status of the service contract, such as Inactive.
Subtotal	Туре
	currency
	Properties Filter, Nillable
	Description
	Total of the service contract line items (products) before discounts, taxes, and shipping are applied.
Tax	Туре
	currency
	Properties
	Create, Filter, Nillable, Update

Field	Details
	Description Total taxes for the service contract.
Term	Type int
	Properties Create, Filter, Nillable, Update
	Description Number of months that the service contract is valid.
TotalPrice	Type currency
	Properties Filter, Nillable
	Description Total of the contract line items (products) after discounts and before taxes and shipping.

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceContractChangeEvent (API version 44.0)

Change events are available for the object.

ServiceContractFeed (API version 23.0)

Feed tracking is available for the object.

ServiceContractHistory

History is available for tracked fields of the object.

ServiceContractOwnerSharingRule

Sharing rules are available for the object.

ServiceContractShare

Sharing is available for the object.

ServiceCrew

Represents a group of service resources who can be assigned to service appointments as a unit.

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

Service appointments can only be assigned to service resources. To assign a service crew to service appointments, you must create a service resource with a resource type of Crew that represents the crew, then use the resource for assignment purposes.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
CrewSize	Туре
	int
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The number of members on the crew. This field is manual, so it doesn't
	auto-update when you add or remove members.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the service crew was last modified. Its label in the user interface
	is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the service crew was last viewed.
Name	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The name of the service crew. For example, Repair Crew.
OwnerId	Туре
	reference

Field Name	Details
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The crew owner. By default, the owner is the person who created the service
	crew.

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceCrewChangeEvent (API version 48.0)

Change events are available for the object.

ServiceCrewFeed

Feed tracking is available for the object.

ServiceCrewHistory

History is available for tracked fields of the object.

Service Crew Owner Sharing Rule

Sharing rules are available for the object.

ServiceCrewShare

Sharing is available for the object.

ServiceCrewMember

Represents a technician service resource that belongs to a service crew.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
EndDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update

Description The last day that the service resource belongs to the crew. You can use to track employment dates for contractors. Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description	this field
boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description	
Properties Create, Defaulted on create, Filter, Group, Sort, Update Description	
Create, Defaulted on create, Filter, Group, Sort, Update Description	
Description	
Indicates that the member is the crew leader.	
LastReferencedDate Type	
dateTime	
Properties	
Filter, Nillable, Sort	
Description	.1
The date when the service crew member was last modified. Its label in interface is Last Modified Date.	the user
interface is Last Modified Date.	
LastViewedDate Type	
dateTime	
Properties	
Filter, Nillable, Sort	
Description	
The date when the service crew member was last viewed.	
ServiceCrewId Type	
reference	
Properties	
Create, Filter, Group, Sort	
Description	
The crew that the service resource belongs to.	
ServiceCrewMemberNumber Type	
string	
Properties Autonumber, Defaulted on create, Filter, Sort	
Description	
An auto-generated number identifying the service crew member.	
ServiceResourceId Type	
reference	

Field Name	Details
	Properties Create, Filter, Group, Sort, Update
	Description The service resource that belongs to the crew. Only service resources whose resource type is Technician can be added to service crews.
StartDate	Type dateTime
	Properties Create, Filter, Sort, Update
	Description Required. The day the service resource joins the crew. Service resources can belong to multiple crews as long as their start and end dates don't overlap.

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceCrewMemberChangeEvent (API version 48.0)

Change events are available for the object.

ServiceCrewMemberFeed

Feed tracking is available for the object.

ServiceCrewMemberHistory

History is available for tracked fields of the object.

ServiceReport

Represents a report that summarizes a work order, work order line item, or service appointment.

The fields that appear on a service report are determined by its service report template. Service reports can be signed by the customer and shared as a PDF.

Supported Calls

create(), delete(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(),
undelete()

Special Access Rules

Field Service must be enabled.

Field Name	Details
ContentVersionDocumentId	Туре
	reference
	Properties Filter, Group, Nillable, Sort
	Description ID of the service report version, used for storage.
DocumentBody	Type base64
	Properties Create, Nillable
	Description
	The report output.
DocumentContentType	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The type of data used for the report output: application/pdf.
DocumentLength	Туре
	int
	Properties Filter, Group, Nillable, Sort
	Description
	The length of the report output.
DocumentName	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort
	Description The name of the report output, always set to Service Report.
IsSigned	Туре
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort

Field Name	Details
	Description
	Indicates whether the service report contains one or more signatures.
	? Tip: Add this field to the Service Reports related list on work orders, work order line items, and service appointments.
ParentId	Type reference
	Properties Create, Filter, Group, Sort
	Description The ID of the service appointment, work order, or work order line item that the service report summarizes. For example, if you click Create Service Report on a service appointment, this field lists the service appointment's record ID.
ServiceReportLanguage	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Restricted picklist
	Description The language used for the service report. The language is selected in the ServiceReportLanguage field on the associated work order. If the work order doesn't specify a service report language, the report is translated in the default language in Salesforce of the person generating the report.
ServiceReportNumber	Туре
	string
	Properties Autonumber, Defaulted on create, Filter, Sort
	Description
	An auto-generated number identifying the service report.
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The status of the service report. Available in API version 53.0 and later.
	Possible values are:
	• Completed
	• Failed
	• Generating

Field Name	Details
	• In Progress
	• None
	The default value is None.
Template	Type string
	Properties Create, Filter, Group, Nillable, Sort
	Description The service report template used to generate the service report.
	Note: If the person creating the service report doesn't have access to certain objects or fields that are included in the service report template, those fields aren't visible in the report they create.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

Service Report Change Event

Change events are available for the object. Available in API version 55.0 and later.

ServiceReportHistory

History is available for tracked fields of the object.

ServiceReportLayout

Represents a service report template in field service.

Supported Calls

describeSObjects(), query(), retrieve()

Special Access Rules

Field Service must be enabled. All users with Field Service Standard user permission can view the ServiceReportLayout object via the API.

Field Name	Details	
DeveloperName	Type string	
	Properties Filter, Group, Sort	

Field Name	Details	
	Description	
	The developer name of the service report template.	
	Note: Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.	
Language	Type picklist	
	Properties Filter, Group, Restricted picklist, Sort	
	Description	
	The language that the service report template uses.	
LastViewedDate	Type dateTime	
	Properties	
	Filter, Nillable, Sort	
	Description The date the service report template was last viewed.	
MasterLabel	Туре	
	string	
	Properties Filter, Group, Sort	
	Description The name of the service report template. For example, Maintenance Report Template.	
TemplateType	Туре	
	picklist	
	Properties Defaulted on create, Filter, Group, Restricted picklist, Sort	
	Description	
	The type of the service report template. Available in API version 46.0 and later.	
	Possible values are:	
	• DigitalForm	
	• ServiceReport	
	The default value is ServiceReport.	

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

Service Report Layout Change Event

Change events are available for the object. Available in API version 55.0 and later.

ServiceResource

Represents a service technician or service crew in Field Service and Salesforce Scheduler, or an agent in Workforce Engagement. This object is available in API version 38.0 and later.

Supported Calls

create(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(),
search(), update(), upsert()

Special Access Rules

Field Service or Workforce Engagement must be enabled.

Field Name	Details
Description	Type textarea
	Properties Create, Nillable, Update
	Description The description of the resource.
IsActive	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description When selected, this option means that the resource can be assigned to work orders. For service tracking purposes, resources can't be deleted, so deactivating a resource is the best way to send them into retirement.
	Deactivating a user doesn't deactivate the related service resource. You can't create a service resource that is linked to an inactive user.
IsCapacityBased	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field Name	Details
	Description Capacity-based resources are limited to a certain number of hours or appointments in a specified time period.
	Tip: The Capacities related list shows a resource's capacity.
IsOptimizationCapable	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description This field is reserved for Field Service and the managed package. Create a custom field instead of using this field to indicate whether optimization should use a service resource.
LastKnownLatitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The latitude of the last known location.
LastKnownLongitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The longitude of the last known location.
LastKnownLocation	Type location
	Properties Nillable
	Description The service resource's last known location. You can configure this field to display data collected from a custom mobile app. This field is not visible in the user interface, but you can expose it on service resource page layouts or set up field tracking to be able to view a resource's location history.
LastKnownLocationDate	Type dateTime
	Properties Filter, Nillable, Sort, Update

Field Name	Details	
	Description	
	The date and time of the last known location.	
LastReferencedDate	Туре	
	dateTime	
	Properties Filter, Nillable, Sort	
	Description	
	The date when the service resource was last modified. Its label in the user interface	
	is Last Modified Date.	
LastViewedDate	Туре	
	dateTime	
	Properties	
	Filter, Nillable, Sort	
	Description	
	The date when the service resource was last viewed.	
LocationId	Туре	
	reference	
	Properties	
	Create, Filter, Group, Sort, Nillable, Update	
	Description	
	The location associated with the service resource. For example, a service vehicle driven by the service resource.	
	This is a relationship field.	
	Relationship Name	
	Location	
	Relationship Type	
	Lookup	
	Refers To Location	
	Location	
Name	Туре	
	string	
	Properties	
	Create, Filter, Group, idLookup, Sort, Update	
	Description	
	The resource's name. You'll likely want this to be the name or title of the associated user or service crew.	

Field Name	Details
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The owner of the service resource.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
RelatedRecordId	Type reference
	Properties Create, Filter, Group, Sort, Nillable, Update
	Description The associated user. Its label in the UI is User. If the service resource represents a service crew rather than a user, leave the User field blank and select the related crew in the ServiceCrewId field.
	This is a relationship field.
	Relationship Name RelatedRecord
	Relationship Type Lookup
	Refers To User
ResourceType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Indicates whether the resource is a Technician (T), Dispatcher (D), Crew (C), Asset (S), Agent (A), or Planner (P). The default value is Technician (T). Resources who are dispatchers can't be capacity-based or included in scheduling optimization. Only users with the Field Service Dispatcher permission set license can be dispatchers. You can't add additional resource types.

Field Name	Details
ServiceCrewId	Type reference
	Properties Create, Filter, Group, Sort, Nillable, Update
	Description The associated service crew. If the service resource represents a crew, select the crew.
	Note: This field is hidden for all users by default. To use it, update its field-level security settings in Setup and add it to your service resource page layouts.

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceResourceChangeEvent (API version 48.0)

Change events are available for the object.

ServiceResourceFeed

Feed tracking is available for the object.

ServiceResourceHistory

History is available for tracked fields of the object.

ServiceResourceOwnerSharingRule

Sharing rules are available for the object.

ServiceResourceShare

Sharing is available for the object.

ServiceResourceCapacity

Represents the maximum number of scheduled hours or number of service appointments that a capacity-based service resource can complete within a specific time period. This object is available in API version 38.0 and later.

Supported Calls

create(), delete(), describeLayout(), getDeleted(), getUpdated(), query(), retrieve(), search(),
update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details	
CapacityInHours	Туре	
	double	
	Properties	
	Create, Filter, Nillable, Sort, Update	
	Description	
	The number of hours that the resource can work per time period. You must fill out this field, the CapacityInWorkItems field, or both.	
CapacityInWorkItems	Туре	
	int	
	Properties	
	Create, Filter, Group, Nillable, Sort, Update	
	Description	
	The total number of service appointments that the resource can complete per time period. You must fill out this field, the CapacityInHours field, or both.	
CapacityNumber	Туре	
	string	
	Properties	
	Autonumber, Defaulted on create, Filter, idLookup, Sort	
	Description	
	(Read only) An auto-generated number identifying the capacity record.	
EndDate	Туре	
	date	
	Properties	
	Create, Filter, Group, Nillable, Sort, Update	
	Description	
	The date the capacity ends; for example, the end date of a contract.	
LastReferencedDate	Туре	
	dateTime	
	Properties	
	Filter, Nillable, Sort	
	Description	
	The timestamp for when the current user last viewed a record related to this record.	
LastViewedDate	Туре	
	dateTime	

Field Name	Details
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
ServiceResourceId	Type reference
	Properties Create, Filter, Group, Sort
	Description The associated service resource. You can set multiple capacities for a resource as long as their start and end dates do not overlap.
StartDate	Type date
	Properties Create, Filter, Group, Sort
	Description The date the capacity goes into effect.
TimePeriod	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Days, Hours, or Months. For example, if a resource can work 80 hours per month, the capacity's Time Period would be <i>Month</i> and Hours per Time Period would be 80.

Service resources who are capacity-based can only work a certain number of hours or complete a certain number of service appointments within a specified time period. Contractors tend to be capacity-based. To indicate that a service resource is capacity-based, select **Capacity-Based** on the service resource record, then create a capacity record for the service resource.

You must fill out at least one of these fields: CapacityInWorkItems and CapacityInHours. If you're using the Field Service managed package and would like to measure capacity both in hours and in number of work items, enter a value for both. The resource is considered to reach their capacity based on whichever term is met first—hours or number of work items.

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

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

Service Resource Capacity Feed

Feed tracking is available for the object.

ServiceResourceCapacityHistory

History is available for tracked fields of the object.

ServiceResourceSkill

Represents a skill that a service resource possesses in Field Service and Lightning Scheduler. This object is available in API version 38.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
EffectiveEndDate	Type datetime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date when the skill expires. For example, if a service resource needs to be re-certified after six months, the end date would be the date their certification expires.
EffectiveStartDate	Type datetime
	Properties Create, Filter, Sort, Update
	Description The date when the service resource gains the skill. For example, if the skill represents a certification, the start date would be the date of certification.
LastReferencedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort

Field Name	Details	
	Description The date when the resource skill was last modified. Its label in the user interface is Last Modified Date.	
LastViewedDate	Type dateTime	
	Properties Filter, Nillable, Sort	
	Description The date when the resource skill was last viewed.	
ServiceResourceId	Type reference	
	Properties Create, Filter, Group, Sort	
	Description The service resource who possesses the skill.	
	This is a relationship field.	
	Relationship Name ServiceResource	
	Relationship Type Lookup	
	Refers To ServiceResource	
SkillId	Type reference	
	Properties Create, Filter, Group, Sort, Update	
	Description The skill the service resource possesses.	
	This is a relationship field.	
	Relationship Name Skill	
	Relationship Type Lookup	
	Refers To Skill	
SkillLevel	Type double	

Field Name	Details
	Properties Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description The service resource's skill level. Skill level can range from zero to 99.99.
SkillNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description An auto-generated number identifying the resource skill assignment.

You can assign skills to all service resources in your org to indicate their certifications and areas of expertise, and specify each resource's skill level from 0 to 99.99. For example, you can assign Maria the "Welding" skill, level 50.

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

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ServiceResourceSkillFeed

Feed tracking is available for the object.

ServiceResourceSkillHistory

History is available for tracked fields of the object.

ServiceTerritory

Represents a geographic or functional region in which work can be performed in Field Service, Salesforce Scheduler, or Workforce Engagement. This object is available in API version 38.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
Address	Type
	address
	Properties Filter
	Description An address to associate with the territory. You may want to list the address of the territory's headquarters.
City	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The city of the associated address. Maximum length is 40 characters.
Country	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The country to associate with the territory. Maximum length is 80 characters.
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	The description of the territory.
GeocodeAccuracy	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The level of accuracy of a location's geographical coordinates compared with its physical address. Usually provided by a geocoding service based on the address's latitude and longitude coordinates.
	Note: This field is available in the API only.

Field Name	Details
IsActive	Туре
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the service territory is meant to be used. If a territory is inactive, you can't add members to it or link it to work orders, work order line items, or service appointments.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the territory was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the territory was last viewed.
Latitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with Longitude to specify the precise geolocation of the address associated with the territory. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
	Note: This field is available in the API only.
Longitude	Туре
	double
	Properties Create, Filter, Nillable, Sort, Update

Field Name	Details
	Description Used with Latitude to specify the precise geolocation of the address associated with the territory. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
	Note: This field is available in the API only.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description The name of the territory.
OperatingHoursId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The territory's operating hours, which indicate when service appointments within the territory can occur. Service resources who are members of a territory automatically inherit the territory's operating hours unless different hours are specified on the resource record.
	This is a relationship field.
	Relationship Name OperatingHours
	Relationship Type Lookup
	Refers To Operating Hours
ParentTerritoryId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The territory's parent service territory, if it has one. For example, a <i>Northern California</i> territory can have a <i>State of California</i> territory as its parent. A service territory hierarchy can contain up to 10,000 territories.
	This is a relationship field.
	Relationship Name
	ParentTerritory

Field Name	Details
	Relationship Type Lookup
	Refers To ServiceTerritory
PostalCode	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The postal code of the address associated with the territory. Maximum length is 20 characters.
State	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The state of the address associated with the territory. Maximum length is 80 characters.
Street	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The street number and name of the address associated with the territory.
TopLevelTerritoryId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description (Read only) The top-level territory in a hierarchy of service territories. Depending on where a territory lies in the hierarchy, its top-level territory might be the same as its parent.
	This is a relationship field.
	Relationship Name TopLevelTerritory
	Relationship Type Lookup

Field Name	Details
	Refers To ServiceTerritory
TypicalInTerritoryTravelTime	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Estimated number of minutes needed to travel from one location to another within the service territory. You can use this field in Apex customization.

If you want to use service territories, determine which territories you need to create. Depending on how your business works, you may decide to create territories based on cities or counties, or on functional categories such as sales versus service. If you plan to build out a hierarchy of service territories, create the highest-level territories first.

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

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceTerritoryChangeEvent (API version 48.0)

Change events are available for the object.

ServiceTerritoryFeed

Feed tracking is available for the object.

ServiceTerritoryHistory

History is available for tracked fields of the object.

ServiceTerritoryOwnerSharingRule

Sharing rules are available for the object.

ServiceTerritoryShare

Sharing is available for the object.

ServiceTerritoryLocation

Represents a location associated with a particular service territory in field service.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Fields

Field Name	Details
LocationId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The location that is associated with the service territory.
ServiceTerritoryId	Type reference
	Properties Create, Filter, Group, Sort
	Description The associated service territory.
ServiceTerritoryLocationNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, Sort
	Description (Read only) Auto-generated number identifying the service territory location.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ServiceTerritoryLocationChangeEvent (API version 55.0)

Change events are available for the object.

Service Territory Location Feed

Feed tracking is available for the object.

ServiceTerritoryLocationHistory

History is available for tracked fields of the object.

ServiceTerritoryMember

Represents a service resource who can be assigned in a service territory in Field Service, Salesforce Scheduler, or Workforce Engagement. This object is available in API version 38.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()

Special Access Rules

Field Service or Workforce Engagement must be enabled.

Field Name	Details
Address	Type address
	Properties Filter
	Description The member's address. You may want to list the related service resource's address in this field.
City	Type string
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The city of the member's address. Maximum length is 40 characters.
Country	Type string
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The country of the member's address. Maximum length is 80 characters.
EffectiveEndDate	Type datetime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date when the service resource is no longer a member of the territory. If the resource will be working in the territory for the foreseeable future, leave this field blank. This field is mainly useful for indicating when a temporary relocation ends.
EffectiveStartDate	Type datetime

Field Name	Details
	Properties
	Create, Filter, Sort, Update
	Description
	The date when the service resource becomes a member of the service territory.
GeocodeAccuracy	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The level of accuracy of a location's geographical coordinates compared with its
	physical address. Usually provided by a geocoding service based on the address's
	latitude and longitude coordinates.
	Note: This field is available in the API only.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the territory member was last modified. Its label in the user
	interface is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the territory member was last viewed.
Latitude	Туре
	double
	Properties
	Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description
	Used with Longitude to specify the precise geolocation of the member's
	address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
	Note: This field is available in the API only.

Field Name	Details
Longitude	Туре
	double
	Properties Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description Used with Latitude to specify the precise geolocation of the member's address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
	Note: This field is available in the API only.
MemberNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	(Read only) An auto-generated number identifying the service territory member.
OperatingHoursId	Туре
	reference
	Properties Create, Filter, Group, Sort, Nillable, Update
	Description
	The operating hours assigned to the service territory member. If no operating hours are specified, the member is assumed to use their parent service territory's operating hours. If a member needs special operating hours, create them in Setup and select them in the Operating Hours lookup field on the member's detail page.
	This is a relationship field.
	Relationship Name OperatingHours
	Relationship Type Lookup
	Refers To OperatingHours
PostalCode	Type string
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The postal code of the member's address. Maximum length is 20 characters.

Field Name	Details
ServiceResourceId	Туре
	reference
	Properties
	Create, Filter, Group, Sort, Update
	Description The service resource assigned to the service towiters.
	The service resource assigned to the service territory.
	This is a relationship field.
	Relationship Name ServiceResource
	Relationship Type
	Lookup
	Refers To ServiceResource
ServiceTerritoryId	Type reference
	Properties
	Create, Filter, Group, Sort
	Description
	The service territory that the service resource is assigned to.
	This is a relationship field.
	Relationship Name
	ServiceTerritory
	Relationship Type
	Lookup
	Refers To
	ServiceTerritory
State	Туре
	string
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The state of the member's address. Maximum length is 80 characters.
Street	Туре
	textarea
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The street number and name of the member's address
	The street number and name of the member's address.

Field Name	Details
TerritoryType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Primary, Secondary, or Relocation.
	 The primary territory is typically the territory where the resource works most often—for example, near their home base. Service resources can only have one primary territory.
	 Secondary territories are territories where the resource can be assigned to appointments if needed. Service resources can have multiple secondary territories.
	 Relocation territories represent temporary moves for service resources. If you're using the Field Service managed packages with the scheduling optimizer, resources with relocation territories are always assigned to services within their relocation territories during the specified relocation dates; if they don't have a relocation territory, the primary territories are favored over the secondary.
	For example, a service resource might have the following territories:
	 Primary territory: West Chicago
	Secondary territories:
	- East Chicago
	- South Chicago
	 Relocation territory: Manhattan, for a three-month period

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

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceTerritoryMemberChangeEvent (API version 48.0)

Change events are available for the object.

${\bf Service Territory Member Feed}$

Feed tracking is available for the object.

ServiceTerritoryMemberHistory

History is available for tracked fields of the object.

Shift

Represents a shift for service resource scheduling. Available in API versions 46.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), upsert()

Special Access Rules

Field Service or Workforce Engagement must be enabled. For Field Service, users must have Field Service permission. For Workforce Engagement, users must have the Workforce Engagement Admin or Planner permission set.

Field	Details
BackgroundColor	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Sets a background color when shifts are displayed in the UI. Use a 3- or 6-digit hexadecimal format, for example #FF00FF. Available in API version 54.0 and later.
EndTime	Туре
	dateTime
	Properties
	Create, Filter, Sort, Update
	Description The date and time that the shift ends.
IsHolidayShift	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates a shift that overlaps with holiday hours. The default value is false. Available in API version 55.0 and later.
IsNonStandard	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description
	Indicates whether the shift is nonstandard, such as overtime or on-call shifts.
	The default value is false. Available in API version 54.0 and later.
JobProfileId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The job profile associated with the shift. Available in API versions 47.0 and later.
Label	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The label that a shift is given.
LastReferencedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description
	The date and time when the current user last viewed a related record.
LastViewedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description
	The date and time when the current user last viewed this record.
OwnerId	Туре
	reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The owner of the shift.
	This is a polymorphic relationship field.
	Relationship Name
	Owner

Field	Details
	Relationship Type Lookup
	Refers To Group, User
RecordsetFilterCriteriaId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the recordset filter criteria selected for the shift. Available in API version 49.0 and later.
	This is a relationship field.
	Relationship Name RecordsetFilterCriteria
	Relationship Type Lookup
	Refers To RecordsetFilterCriteria
ServiceResourceId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the service resource the shift belongs to. Available in API versions 47.0 and later.
	This is a relationship field.
	Relationship Name ServiceResource
	Relationship Type Lookup
	Refers To ServiceResource
ServiceTerritoryId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the service territory the shift belongs to. Available in API versions 47.0 and later.
	This is a relationship field.

Field	Details
	Relationship Name ServiceTerritory Relationship Type Lookup Refers To ServiceTerritory
ShiftNumber	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The number automatically given to the shift upon creation.
ShiftTemplateId	Type reference Properties Create, Filter, Group, Nillable, Sort Description The shift template ID, if the shift was created from a shift template. Available in API version 53.0 and later. This is a relationship field. Relationship Name ShiftTemplate Relationship Type Lookup Refers To ShiftTemplate
StartTime	Type dateTime Properties Create, Filter, Sort, Update Description The date and time that the shift starts.
Status	Type picklist Properties Create, Filter, Group, Sort, Update

Field	Details
	Description Describes the status of the shift. Users can create custom values. Default values are:
	• Tentative
	• Published
	• Confirmed
StatusCategory	Type picklist
	Properties Filter, Group, Nillable, Restricted picklist, Sort
	Description Describes the status of the shift using static values. This field is derived from Status using the mapping defined in setup.
	Possible values are:
	• Tentative
	• Published
	• Confirmed
TimeSlotType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Type of time slot for the shift. The same setup values as the TimeSlot field in the OperatingHours object.
	Possible values are:
	Normal (default value)
	• Extended

Scheduling and dispatching service resources using shift data is not supported in API version 46.0, and is a pilot feature in API version 47.0.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ShiftFeed

Feed tracking is available for the object.

ShiftHistory

History is available for tracked fields of the object.

Shift Owner Sharing Rule

Sharing rules are available for the object.

ShiftShare

Sharing is available for the object.

ShiftPattern

Represents a pattern of templates for creating shifts. This object is available in API version 51.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled. Users must have Field Service permission.

Field	Details
Description	Type textarea
	Properties Create, Nillable, Update
	Description A short description of the shift pattern to help users identify the pattern.
IsActive	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates that the shift pattern can be used to create shifts.
	The default value is 'false'.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date that the shift pattern was last used.

Type dateTime Properties Filter, Nillable, Sort Pescription The date that the shift pattern was last viewed. Name Type string Properties Create, Filter, Group, idLookup, Sort, Update Description A short, descriptive name of the shift pattern. OwnerId Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User PatternLength Type int Properties Create, Filter, Group, Sort, Update Description Type int Properties Create, Filter, Group, Sort, Update Description Type int Properties Create, Filter, Group, Sort, Update	Field	Details
Properties Filter, Nillable, Sort Description The date that the shift pattern was last viewed. Name Type string Properties Create, Filter, Group, idLookup, Sort, Update Description A short, descriptive name of the shift pattern. OwnerId Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User FatternLength Type int Properties Create, Filter, Group, Sort, Update	LastViewedDate	
PatternLength Filter, Nillable, Sort Description The date that the shift pattern was last viewed. Type string Properties Create, Filter, Group, idLookup, Sort, Update Description A short, descriptive name of the shift pattern. Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User Type int Properties Create, Filter, Group, Sort, Update		dateTime
The date that the shift pattern was last viewed. Name Type string Properties Create, Filter, Group, idLookup, Sort, Update Description A short, descriptive name of the shift pattern. OwnerId Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User PatternLength Type int Properties Create, Filter, Group, Sort, Update		
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Create, Filter, Group, idLookup, Sort, Update Description A short, descriptive name of the shift pattern. OwnerId Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User Type int Properties Create, Filter, Group, Sort, Update		string
Description A short, descriptive name of the shift pattern. Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User PatternLength Type int Properties Create, Filter, Group, Sort, Update		Properties
OwnerId Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User PatternLength Type int Properties Create, Filter, Group, Sort, Update		Create, Filter, Group, idLookup, Sort, Update
OwnerId Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User Type int Properties Create, Filter, Group, Sort, Update		
reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User PatternLength Type int Properties Create, Filter, Group, Sort, Update		A short, descriptive name of the shift pattern.
Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User PatternLength Type int Properties Create, Filter, Group, Sort, Update	OwnerId	
Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User PatternLength Type int Properties Create, Filter, Group, Sort, Update		
The ID of the owner of the shift pattern. Default is the user who creates the shift pattern. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User PatternLength Type int Properties Create, Filter, Group, Sort, Update		
This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User PatternLength Type int Properties Create, Filter, Group, Sort, Update		
Relationship Name Owner Relationship Type Lookup Refers To Group, User Type int Properties Create, Filter, Group, Sort, Update		
Relationship Type Lookup Refers To Group, User Type int Properties Create, Filter, Group, Sort, Update		
Lookup Refers To Group, User Type int Properties Create, Filter, Group, Sort, Update		
Lookup Refers To Group, User Type int Properties Create, Filter, Group, Sort, Update		Relationship Type
Group, User Type int Properties Create, Filter, Group, Sort, Update		
PatternLength Type int Properties Create, Filter, Group, Sort, Update		Refers To
int Properties Create, Filter, Group, Sort, Update		Group, User
int Properties Create, Filter, Group, Sort, Update	PatternLength	Туре
Create, Filter, Group, Sort, Update		
Description		Create, Filter, Group, Sort, Update
		Description
The duration in days of the shift pattern.		The duration in days of the shift pattern.

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

Shift Pattern Feed

Feed tracking is available for the object.

ShiftPatternHistory

History is available for tracked fields of the object.

ShiftPatternShare

Sharing is available for the object.

ShiftPatternEntry

ShiftPatternEntry links a shift template to a shift pattern. This object is available in API version 51.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled. Users must have Field Service permission.

Field	Details
DayOrder	Type int
	Properties Create, Filter, Group, Sort, Update
	Description DayOrder links the shift template to the specific day within the shift pattern duration that the template. For example, if the DayOrder is 2 then a shift from the associated template is created on the second day of the pattern.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date that the shift pattern entry was last used.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date that the shift pattern entry was last viewed.

Field	Details
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated reference number for the shift pattern entry.
ShiftPatternId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The ID of the shift pattern that the shift pattern entry is linked to.
	This is a relationship field.
	Relationship Name
	ShiftPattern
	Relationship Type
	Lookup
	Refers To
	ShiftPattern
ShiftTemplateId	Туре
	reference
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The ID of the shift template that's used to create shifts for this shift pattern entry.
	This is a relationship field.
	Relationship Name
	ShiftTemplate
	Relationship Type
	Lookup
	Refers To
	ShiftTemplate

${\it Shift Template}$

Represents a template for creating shifts. This object is available in API version 51.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), update(), upsert()

Special Access Rules

Field Service or Workforce Engagement must be enabled. For Field Service, users must have Field Service permission. For Workforce Engagement, the user needs to have a Workforce Engagement Admin or Planner permission set.

Field	Details
BackgroundColor	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Sets a background color when shifts are displayed in the UI. Use a 3- or 6-digit hexadecimal format, for example #FF00FF. Available in API version 54.0 and later.
Description	Type textarea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description Additional information about the shift like number of breaks or activities.
Duration	Type double
	Properties Create, Filter, Sort, Update
	Description How long the shift lasts. The unit of measurement for this field is determined by ShiftTemplateDurationType.
IsActive	Туре
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the shift is active or inactive.
IsNonStandard	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the shift is nonstandard, such as overtime or on-call shifts.
	The default value is false. Available in API version 54.0 and later.
JobProfileId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The Job Profile record. This field is optional.
	This is a relationship field.
	Relationship Name JobProfile
	Relationship Type Lookup
	Refers To JobProfile
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the shift template was last modified. Its label in the user interface is Last Modified Date .
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date when the shift template was last viewed.
Name	Type
	string Properties Create, Filter, Group, idLookup, Sort, Update
	Description The shift template record name.

Field	Details
OwnerId	Туре
	reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The owner of the shift template.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
RecordsetFilterCriteriaId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the recordset filter criteria selected for the shift template. Available in API version 53.0 and later.
	This is a relationship field.
	Relationship Name RecordsetFilterCriteria
	Relationship Type Lookup
	Refers To RecordsetFilterCriteria
ShiftTemplateDurationType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description The unit of measurement for the shift template duration.
	Possible values are:
	• H—Hours
	• M—Minutes
	The default value is H.

Field	Details
StartTime	Type time
	Properties Create, Filter, Sort, Update
	Description The time of day when the shift starts.
TimeSlotType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description The type of time slot. Possible values are:
	NormalExtended
	You can use $Extended$ to represent overtime shifts. Available in API version 55.0 and later.

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

Shift Template Owner Sharing Rule

Sharing rules are available for the object.

ShiftTemplateShare

Sharing is available for the object.

Shift Template Change Event

Change Data Capture events are available for the object. Available in API version 54.0 and later.

Shipment

Represents the transport of inventory in field service or a shipment of order items in Order Management.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

At least one of these features must be enabled:

- Order Management
- Field Service

- B2B Commerce
- Health Cloud Visit Inventory
- Consumer Goods Cloud Retail Execution

Field Name	Details
ActualDeliveryDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description Date the product was delivered.
DeliveredToId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The person or entity the product was delivered to.
	This is a polymorphic relationship field.
	Relationship Name DeliveredTo
	Relationship Type
	Lookup
	Refers To
	Group, User
DeliveryMethodId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The delivery method used for the shipment.
	This field is available in API version 51.0 and later.
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	Details not recorded in the provided fields

Field Name	Details
DestinationLocationId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The place the product is to be delivered.
	This is a relationship field.
	Relationship Name DestinationLocation
	Relationship Type Lookup
	Refers To Location
ExpectedDeliveryDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description Date the product is expected to be delivered.
FulfillmentOrderId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The fulfillment order that the shipment belongs to.
	This field is available in API version 51.0 and later.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort

Field Name	Details
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
OrderSummaryId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The order summary associated with the shipment.
	This field is available in API version 51.0 and later.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The owner of the shipment.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
Provider	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The company or person making the transfer.
ReturnOrderId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	For a return Shipment, the associated ReturnOrder.
	This field is available in API version 53.0 and later.

Field Name	Details
ShipFromAddress	Туре
	address
	Properties
	Filter, Nillable
	Description
	The place the product is coming from.
ShipFromCity	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The city of the address where the shipment originates.
ShipFromCountry	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The country of the address where the shipment originates.
ShipFromGeocodeAccuracy	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Accuracy level of the geocode for the address where the shipment originates.
	See Compound Field Considerations and Limitations for details on geolocation compound fields.
	Note: This field is available in the API only.
ShipFromLatitude	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Used with Longitude to specify the precise geolocation of the address where the
	shipment originates. Acceptable values are numbers between –90 and 90 with
	up to 15 decimal places. See Compound Field Considerations and Limitations
	for details on geolocation compound fields.
	for details on geolocation compound fields.

Field Name	Details
ShipFromLongitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with Latitude to specify the precise geolocation of the address where the shipment originates. Acceptable values are numbers between –180 and 180 with up to 15 decimal places. See Compound Field Considerations and Limitations for details on geolocation compound fields.
	Note: This field is available in the API only.
ShipFromPostalCode	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The postal code of the address where the shipment originates.
ShipFromState	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The state of the address where the shipment originates.
ShipFromStreet	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The street of the address where the shipment originates.
ShipToAddress	Type address
	Properties Filter, Nillable
	Description The physical address where the shipment is delivered.
ShipToCity	Type string

Field Name	Details
	Properties Control of the Control of
	Create, Filter, Group, Nillable, Sort, Update
	Description The city of the address where the shipment is delivered.
ShipToCountry	Type
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The country of the address where the shipment is delivered.
ShipToGeocodeAccuracy	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Accuracy level of the geocode for the address where the shipment is delivered. See Compound Field Considerations and Limitations for details on geolocation compound fields.
	Note: This field is available in the API only.
ShipToLatitude	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Used with Longitude to specify the precise geolocation of the address where the shipment is delivered. Acceptable values are numbers between –90 and 90 with up to 15 decimal places. See Compound Field Considerations and Limitations for details on geolocation compound fields.
	Note: This field is available in the API only.
ShipToLongitude	Туре
	double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with Latitude to specify the precise geolocation of the address where the shipment is delivered. Acceptable values are numbers between –180 and 180

Field Name	Details
	with up to 15 decimal places. See Compound Field Considerations and Limitations for details on geolocation compound fields.
	Note: This field is available in the API only.
ShipToName	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The shipment recipient.
ShipToPostalCode	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The postal code of the address where the shipment is delivered.
ShipToState	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The state of the address where the shipment is delivered.
ShipToStreet	Туре
	textarea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The street of the address where the shipment is delivered.
ShipmentNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated number identifying the shipment.
SourceLocationId	Туре
	reference

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The field service location where the shipment originates.
	This is a relationship field.
	Relationship Name SourceLocation
	Relationship Type Lookup
	Refers To Location
Status	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The status of the shipment. The picklist includes the following values, which can be customized:
	• Shipped—The product is in transit.
	 Delivered—The product is at the source location.
TotalItemsQuantity	Type double
	Properties Filter, Nillable, Sort
	Description The total quantity of items included in the shipment. This value is calculated as the sum of the quantities of the shipment items in the shipment.
	This field is available in API version 51.0 and later.
TrackingNumber	Type
	string Properties Create, Filter, Group, Nillable, Sort, Update
	Description Tracking number for the shipment.
TrackingUrl	Type url

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description URL of website used for tracking the shipment.

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ShipmentChangeEvent (API version 48.0)

Change events are available for the object.

ShipmentFeed

Feed tracking is available for the object.

ShipmentHistory

History is available for tracked fields of the object.

${\bf Shipment Owner Sharing Rule}$

Sharing rules are available for the object.

ShipmentShare

Sharing is available for the object.

Skill

Represents a category or group of Chat users or service resources in Field Service or Workforce Engagement. This object is available in API version 24.0 and later.



Note: For information about WDC skills on a user's profile, see the ProfileSkill topic.

Supported Calls

create(), describeSObjects(), query(), retrieve(), update(), upsert()

Details	
Туре	
textarea	
Properties	
Create, Nillable, Update	
Description	
The description of the skill.	
	Type textarea Properties Create, Nillable, Update Description

Field Name	Details
DeveloperName	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization.
	Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance slows down while Salesforce generates one for each record.
Language	Type
	picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The language of the skill.
LastViewedDate	Туре
	datetime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed the skill.
MasterLabel	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the skill.

Chat

Use this object to assign Chat users to groups based on their abilities. The skills associated with a LiveChatButton determine which agents receive chat requests that come in through that button.

Field Service

Use this object to track certifications and areas of expertise in your workforce. After you create a skill, you can:

- Assign it to a service resource via the Skills related list on the resource's detail page. When you assign a skill to a service resource, you can specify their skill level and the duration of the skill.
- Add it as a required skill via the Skill Requirements related list on any work type, work order, or work order line item. When you
 add a required skill to a work record, you can specify the skill level.

Workforce Engagement

Use this object to specify areas of expertise in your workforce. After you create a skill, you can:

- Assign it to a service resource via the Skills related list on the resource's detail page.
- Add it as a required skill via the Skill Requirements related list on a job profile.

SkillRequirement

Represents a skill that is required to complete a particular task in Field Service, Salesforce Scheduler, or Workforce Engagement. Skill requirements can be added to work types, work orders, and work order line items in Field Service and Lightning Scheduler, or to job profiles in Workforce Engagement. This object is available in API version 38.0 and later. You also can add skill requirements to work items in Omni-Channel skills-based routing using API version 42.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()

Special Access Rules

If you want to use SkillRequirement for Field Service use cases, then Field Service must be enabled.

If you want to use SkillRequirement only for Omni-Channel skills-based routing use cases, then you don't need Field Service to be enabled.

If you want to use SkillRequirement for Workforce Engagement use cases, then Workforce Engagement must be enabled.

Field Name	Details
IsAdditionalSkill	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates that a skill is additional. After a designated timeout period, a skill marked as additional is dropped from Omni-Channel routing. The case is then routed to the best-matched agent even if they don't have all the skills.

Field Name	Details
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
RelatedRecordId	Type reference
	Properties Create, Filter, Group, Sort
	Description The record that the skill is required for. The related record can be a work order, work order line item, work type, or pending service routing record.
	This is a polymorphic relationship field.
	Relationship Name RelatedRecord
	Relationship Type Lookup
	Refers To WorkOrder, WorkOrderLineItem, WorkType
SkillId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The skill that is required.
	This is a relationship field.
	Relationship Name Skill

Field Name	Details
	Relationship Type Lookup Refers To Skill
SkillLevel	Type double
	Properties
	Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description The level of the skill required. Skill levels can range from zero to 99.99. Depending on your business needs, you might want the skill level to reflect years of experience, certification levels, or license classes.
SkillNumber	Type string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated number identifying the skill requirement.
SkillPriority	Туре
	int
	Properties
	Aggregatable, Create, Filter, Group, Nillable, Sort, Update
	Description For additional skills, specify the order in which skills are dropped if after the specified timeout no agent with that skill is available. Higher priority-value skills are dropped first. Lower priority-value skills, for example 0, are dropped last. Skills with the same priority value are dropped as a group. You can set skill priority using skills-based routing rules or Apex code.

Field Service

Skill requirements help dispatchers assign work orders to service resources with the proper expertise. You can still assign a work order, work order line item, or related service appointment to a service resource that does *not* possess the specified skills, so skill requirements serve more as a suggestion than a rule.



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

If many of your work orders require the same skills, add skill requirements to work types to save time and keep your processes consistent. When you add a skill requirement to a work type, work orders and work order line items that use that type automatically inherit the skill

requirement. For example, if all annual maintenance visits for your Classic Refrigerator product require a Refrigerator Maintenance skill level of at least 50, add that skill requirement to the Annual Maintenance Visit work type. When you create a work order for a customer's annual fridge maintenance, applying that work type adds the skill requirement as well.

Workforce Engagement

Workforce Engagement uses skill requirements to assign shifts to agents who have the right skills. You can still assign shifts to service resources if they don't have those skills.

In an non-Omni workflow, create a scheduling rule that matches agents to shifts based on their skills and the job profile's skill requirements. Shift scheduling tools can then assign agents with the right skills.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

SkillRequirementFeed

Feed tracking is available for the object.

SkillRequirementHistory

History is available for tracked fields of the object.

TimeSheet

Represents a schedule of a service resource's time in Field Service or Workforce Engagement. This object is available in API v47.0 and later.

Time sheets are composed of time sheet entries, which typically track individual tasks like travel or asset repair.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service or Workforce Engagement must be enabled.

Field Name	Details
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization. The label in the user interface is Currency ISO Code.

Details
Туре
date
Properties
Create, Filter, Group, Sort, Update
Description
The last day the time sheet covers.
Туре
dateTime
Properties
Filter, Nillable, Sort
Description
The timestamp when the current user last accessed this record, a record related
to this record, or a list view.
Туре
dateTime
Properties
Filter, Nillable, Sort
Description The timestamp when the current user last viewed this record or list view. If this
value is null, the user might have only accessed this record or list view
(LastReferencedDate) but not viewed it.
Туре
reference
Properties
Create, Defaulted on create, Filter, Group, Sort, Update
Description
The owner of the time sheet.
Туре
reference
Properties
Create, Filter, Group, Sort, Update
Description
The service resource whose time is being tracked with the time sheet.
Туре
date
Properties

Field Name	Details
	Description The first day the time sheet covers.
Status	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The status of the time sheet. The picklist includes the following values, which can be customized:
	 New
	 Submitted
	 Approved
TimeSheetEntryCount	Type int
	Properties
	Filter, Group, Nillable, Sort
	Description
	(Read Only) The number of related time sheet entries.
TimeSheetNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated number identifying the time sheet.
TotalDurationInHours	Туре
	double
	Properties Filter, Nillable, Sort
	Description Represents the sum total of the duration field of all the time sheet entries related to the time sheet object in hours.
TotalDurationInMinutes	Type int
	Properties
	Filter, Group, Nillable, Sort

Field Name	Details
	Description Represents the sum total of the duration field of all the time sheet entries related to the time sheet object in minutes.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

TimeSheetChangeEvent (API version 48.0)

Change events are available for the object.

TimeSheetFeed

Feed tracking is available for the object.

TimeSheetHistory

History is available for tracked fields of the object.

Time Sheet Owner Sharing Rule

Sharing rules are available for the object.

TimeSheetShare

Sharing is available for the object.

TimeSheetEntry

Represents a span of time that a service resource spends on a field service task. This object is available in API version 47.0 and later.

Time sheets are composed of time sheet entries. Time sheet entries typically track individual tasks like travel or asset repair.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field Name	Details
	Description Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization. The label in the user interface is Currency ISO Code.
	Time sheet entries inherit their time sheet's currency code. Updates to a time sheet's currency code aren't reflected in existing time sheet entries' currency code.
Description	Type textarea
	Properties Create, Nillable, Update
	Description Notes on how the time was spent. For example, "This service took longer than normal because the machine was jammed."
DurationInMinutes	Type int
	Properties Filter, Group, Nillable, Sort
	Description Minutes recorded on the time sheet entry.
EndTime	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date and time the activity finished.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort

Field Name	Details
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
LocationTimeZone	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Time zone of the location where the activity occurred.
	This field is available in API version 50.0 and later.
StartTime	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date and time the activity began.
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The status of the time sheet entry. The picklist includes the following values, which can be customized:
	• New
	SubmittedApproved
Subject	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description Activity performed; for example, repair, lunch, or travel.
TimeSheetEntryNumber	Type string

Field Name	Details
	Properties
	Autonumber, Defaulted on create, Filter, Sort
	Description
	An auto-generated number identifying the time sheet entry.
TimeSheetId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The time sheet associated with the time sheet entry.
Type	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The type of work performed. The picklist includes the following values, which
	can be customized:
	 Direct
	 Indirect
WorkOrderId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The work order related to the time sheet entry. Work orders are searchable by
	their content.
WorkOrderLineItemId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The work order line item related to the time sheet entry. Work order line items are searchable by their content.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

TimeSheetEntryChangeEvent (API version 48.0)

Change events are available for the object.

TimeSheetEntryFeed

Feed tracking is available for the object.

TimeSheetEntryHistory

History is available for tracked fields of the object.

TimeSlot

Represents a period of time on a specified day of the week during which work can be performed in Field Service, Salesforce Scheduler, or Workforce Engagement. Operating hours consist of one or more time slots. This object is available in API version 38.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), update(), upsert()

Field Name	Details
DayOfWeek	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description
	The day of the week when the time slot takes place.
EndTime	Туре
	time
	Properties
	Create, Filter, Sort, Update
	Description
	The time when the time slot ends.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this
	record.
LastViewedDate	Туре
	dateTime

Field Name	Details
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
MaxAppointments	Type int
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description Maximum number of appointments for a single time slot. Available in API version 47.0 and later.
OperatingHoursId	Type reference
	Properties Create, Filter, Group, Sort
	Description The operating hours that the time slot belongs to. An operating hours' time slots appear in the Operating Hours related list.
	This is a relationship field.
	Relationship Name OperatingHours
	Relationship Type Lookup
	Refers To OperatingHours
StartTime	Type time
	Properties Create, Filter, Sort, Update
	Description The time when the time slot starts.
TimeSlotNumber	Type
	string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort

Field Name	Details
	Description The name of the time slot. The name is auto-populated to a day and time format—for example, Monday 9:00 AM - 10:00 PM—but you can manually update it if you wish.
Type	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description The type of time slot. Possible values are <i>Normal</i> and <i>Extended</i> . You may choose to use <i>Extended</i> to represent overtime shifts.
WorkTypeGroupId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Work type group assigned to the time slot. Available in API version 47.0 and later.
	This is a relationship field.
	Relationship Name WorkTypeGroup
	Relationship Type Lookup
	Refers To WorkTypeGroup

Operating hours are composed of time slots, which indicate the hours of operation for a particular day. After you create operating hours, create time slots for each day. For example, if the operating hours should be 8 AM to 5 PM Monday through Friday, create five time slots, one per day. To reflect breaks such as lunch hours, create multiple time slots in a day: for example, *Monday 8:00 AM - 12:00 PM* and *Monday 1:00 PM - 5:00 PM*.



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

WarrantyTerm

Represents warranty terms defining the labor, parts, and expenses covered, along with any exchange options, provided to rectify issues with products. This object is available in API version 50.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
Code	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A code or other identifier associated with this warranty term.
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	Description of the warranty term.
EffectiveStartDate	Туре
	picklist
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Date on which the warranty term became available for use.
	Possible values are:
	• InstallDate
	• ManufactureDate
	• PurchaseDate
ExchangeType	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The type of exchange offered.
	Possible values are:
	AdvanceExchange
	• Loaner

Field	Details
	ReturnExchange
Exclusions	Type textarea
	Properties Create, Nillable, Update
	Description Description of any exclusions.
ExpensesCovered	Type percent
	Properties Create, Filter, Nillable, Sort, Update
	Description The percentage of expenses covered.
ExpensesCoveredDuration	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The duration for which expenses are covered.
ExpensesCoveredUnitOfTime	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The unit in which expenses covered duration is measured.
	Possible values are:
	• Days
	MonthsWeeks
	• Years
IsActive	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Defines whether the warranty term is active.

Field	Details
IsTransferable	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Defines whether the warranty can be transferred to a new owner.
LaborCovered	Туре
	percent
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The percentage of labor covered.
LaborCoveredDuration	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The duration for which labor is covered.
LaborCoveredUnitOfTime	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The unit in which labor covered duration is measured.
	Possible values are:
	DaysMonths
	• Weeks
	• Years
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the warranty term was last modified. Its label in the user interface is Last
	Modified Date.

Field	Details
LastViewedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description The date when the warranty term was last viewed.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The warranty term's assigned owner.
PartsCovered	Туре
	percent
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The percentage of parts covered.
PartsCoveredDuration	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The duration for which parts are covered.
PartsCoveredUnitOfTime	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The unit in which parts covered duration is measured.
	Possible values are:
	• Days
	• Months
	• Weeks
	• Years

Field	Details
Pricebook2Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the price book item associated with this warranty term.
WarrantyDuration	Type int
	Properties Create, Filter, Group, Sort, Update
	Description The duration of the warranty offered by this term.
WarrantyTermName	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description The name of the warranty term.
WarrantyType	Type picklist
	Properties Create, Filter, Group, Sort, Update
	Description The type of warranty.
	Possible values are:
	RepairStandard
	• Supplier
WarrantyUnitOfTime	Type picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description The unit in which the warranty duration is measured.
	Possible values are:
	• Days

Field	Details
	• Months
	• Weeks
	• Years

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

WarrantyTermChangeEvent

Change events are available for the object.

WorkOrder

Represents field service work to be performed for a customer. This object is available in API version 36.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

- Work orders or Field Service must be enabled.
- The following fields can't be edited, regardless of your field-level security settings:
 - Discount
 - GrandTotal
 - IsGeneratedFromMaintenancePlan
 - RootWorkOrderId

Field Name	Details
AccountId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The account associated with the work order.
	This is a relationship field.
	Relationship Name Account

Field Name	Details
	Relationship Type
	Lookup
	Refers To Account
	Account
Address	Туре
	address
	Properties Filter, Nillable
	Description
	The compound form of the address where the work order is completed.
AssetId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The asset associated with the work order.
	This is a relationship field.
	Relationship Name
	Asset
	Relationship Type Lookup
	Refers To
	Asset
AssetWarrantyId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The asset warranty term associated with the work order. This field is available in API version 50.0 and above.
BusinessHoursId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The business hours associated with the work order.
	This is a relationship field.

Field Name	Details
	Relationship Name
	BusinessHours
	Relationship Type Lookup
	Refers To
	BusinessHours
CaseId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The case associated with the work order.
	This is a relationship field.
	Relationship Name
	Case
	Relationship Type Lookup
	Refers To
	Case
City	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The city where the work order is completed. Maximum length is 40 characters
ContactId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The contact associated with the work order.
	This is a relationship field.
	Relationship Name
	Contact
	Relationship Type Lookup
	Refers To
	Contact

Field Name	Details
Country	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The country where the work order is completed. Maximum length is 80 characters.
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Available only for orgs with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the organization. The label in the user interface is Currency ISO Code.
Description	Туре
	textarea
	Properties Create, Nillable, Update
	Description The description of the work order. Try to include the steps needed to change the work order's status to Completed.
Discount	Type
	percent
	Properties Filter, Nillable, Sort
	Description
	Read only. The weighted average of the discounts on all line items in the work order. It can be any positive number up to 100.
Duration	Туре
	double
	Properties Create, Filter, Nillable, Sort, Update
	Description The estimated time required to complete the work order. Specify the duration unit in the Duration Type field.
	Note: Work order duration and work order line item duration are independent of each other. If you want work order duration to

Field Name	Details
	automatically show the sum of the work order line items' duration, replace the Duration field on work orders with a custom roll-up summary field.
DurationInMinutes	Type double
	Properties Filter, Nillable, Sort
	Description The estimated duration in minutes. For internal use only.
DurationType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The unit of the duration: Minutes or Hours.
EndDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date when the work order is completed. This field is blank unless you set up an Apex trigger or quick action to populate it. For example, you can create a quick action that sets the EndDate to 365 days after the StartDate.
EntitlementId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The entitlement associated with the work order.
GeocodeAccuracy	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Accuracy level of the geocode for the address. See Compound Field Considerations and Limitations for details on geolocation compound fields.
	Note: This field is available in the API only.

Field Name	Details
GrandTotal	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	Read only. The total price of the work order with tax added.
IsClosed	Туре
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether the work order is closed (true) or open (false).
	? Tip: Use this field to report on closed versus open work orders.
IsGeneratedFromMaintenancePlar	¹ Type
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	(Read Only) Indicates that the work order was generated from a maintenance
	plan (true), rather than manually created (false).
	Note: This option is deselected for work orders that were generated from maintenance plans before Summer '18.
IsStopped	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether a milestone is paused (true) or counting down (false).
	This field is available only if Enable stopped time and actual elapsed time is selected on the Entitlement Settings page.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the work order was last modified. Its label in the user interface is
	Last Modified Date.

Field Name	Details
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the work order was last viewed.
Latitude	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Used with Longitude to specify the precise geolocation of the address where the
	work order is completed. Acceptable values are numbers between –90 and 90 with up to 15 decimal places. See Compound Field Considerations and Limitations
	for details on geolocation compound fields.
	Note: This field is available in the API only.
LineItemCount	Туре
	int
	Properties
	Filter, Group, Nillable, Sort
	Description
	The number of work order line items in the work order. Its label in the user
	interface is Line Items.
LocationId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The location associated with the work order. For example, a work site.
	This is a relationship field.
	Relationship Name Location
	Relationship Type Lookup
	Refers To
	Location
	Location

Field Name	Details
Longitude	Туре
	double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with Latitude to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between –180 and 180 with up to 15 decimal places. See Compound Field Considerations and Limitations for details on geolocation compound fields.
	Note: This field is available in the API only.
MaintenancePlanId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The maintenance plan associated with the work order. When the work order is auto-generated from a maintenance plan, this field automatically lists the related plan.
MaintenanceWorkRuleId	Туре
	reference
	Properties Filter, Group, Nillable, Sort
	Description
	ID of the maintenance work rule that generated this work order. This field is available in API version 50.0 and above.
MilestoneStatus	Type string
	Properties
	Group, Nillable, Sort
	Description Indicates the status of a milestone. This field is visible if an entitlement process is applied to a work order.
MinimumCrewSize	Туре
	int
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description The minimum crew size allowed for a crew assigned to the work order.
	If you're not using the Field Service managed package, this field serves as a suggestion rather than a rule. If you are using the managed package, the scheduling optimizer counts the number of service crew members on a service crew to determine whether it fits a work order's minimum crew size requirement.
OwnerId	Туре
	reference Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The work order's assigned owner.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ParentWorkOrderId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The work order's parent work order, if it has one.
	Tip: Create a custom report to view a work order's child work orders.
	This is a relationship field.
	Relationship Name ParentWorkOrder
	Relationship Type Lookup
	Refers To WorkOrder
PostalCode	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description The postal code where the work order is completed. Maximum length is 20 characters.
Pricebook2Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The price book associated with the work order. Adding a price book to the work order lets you assign different price book entries to the work order's line items. This is only available if Product2 is enabled.
	This is a relationship field.
	Relationship Name Pricebook2
	Relationship Type Lookup
	Refers To Pricebook2
Priority	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The priority of the work order. The picklist includes the following values, which can be customized:
	• Low
	• Medium
	HighCritical
ProductServiceCampaignId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The product service campaign associated with the work order.
ProductServiceCampaignItemId	Type reference

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The product service campaign item associated with the work order.
RecommendedCrewSize	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The recommended number of people on the service crew assigned to the work order. For example, you might have a Minimum Crew Size of 2 and a Recommended Crew Size of 3.
ReturnOrderId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The return order associated with the work order.
ReturnOrderLineItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The return order line item associated with the work order.
RootWorkOrderId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description (Read only) The top-level work order in a work order hierarchy. Depending on where a work order lies in the hierarchy, its root could be the same as its parent.
	Note: View a work order's child work order in the Child Work Orders related list.
	This is a relationship field.
	Relationship Name RootWorkOrder

Field Name	Details
	Relationship Type
	Lookup
	Refers To WorkOrder
ServiceAppointmentCount	Type int
	Properties Filter, Group, Nillable, Sort
	Description The number of service appointments on the work order.
ServiceContractId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The service contract associated with the work order.
ServiceReportLanguage	Type
	picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The language used for all service reports and service report previews created for the work order, its service appointments, and its work order line items and their service appointments. If the field is blank, service reports are generated in the default language in Salesforce of the person creating the report.
	To appear as an option in the ServiceReportLanguage field, a language must be set up in Translation Workbench or be one of Salesforce's 18 fully supported languages. Rich text fields and service report section names aren't translated.
ServiceReportTemplateId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The service report template that the work order uses. If you don't specify a service report template on a work order, it uses the service report template listed on its work type. If the work type doesn't list a template or no work type is specified, the work order uses the default service report template.

Field Name	Details
ServiceTerritoryId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The service territory where the work order is taking place.
	This is a relationship field.
	Relationship Name ServiceTerritory
	Relationship Type Lookup
	Refers To ServiceTerritory
SlaExitDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The time that the work order exits the entitlement process.
SlaStartDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The time that the work order enters the entitlement process. You can update or reset the time if you have "Edit" permission on work orders.
StartDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date when the work order goes into effect. This field is blank unless you set up an Apex trigger or quick action to populate it. For example, you can create a quick action that sets the StartDate to the date when the Status changes to In Progress.
State	Type string

Field Name	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The state where the work order is completed. Maximum length is 80 characters
Status	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The status of the work order. The picklist includes the following values, which can be customized:
	 New—Work order was created, but there hasn't yet been any activity.
	• In Progress—Work has begun.
	 On Hold—Work is paused.
	• Completed—Work is complete.
	 Cannot Complete—Work could not be completed.
	 Closed—All work and associated activity is complete.
	 Canceled—Work is canceled, typically before any work began.
	Changing a work order's status does not affect the status of its work order line items or associated service appointments.
StatusCategory	Туре
	picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The category that each Status value falls into. The Status Category field has eight default values: seven values which are identical to the default Status values, and a None value for statuses without a status category.
	If you create custom Status values, you must indicate which category it belongs to. For example, if you create a Waiting for Response value you may decide that it belongs in the On Hold category. To learn which processes reference StatusCategory, see How are Status Categories Used?
StopStartDate	Type dateTime
	Properties Filter, Nillable, Sort

Field Name	Details
	Description Indicates when the milestone was paused. The label in the user interface is Stopped Since.
Street	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The street number and name where the work order is completed.
Subject	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The subject of the work order. Try to describe the nature and purpose of the job to be completed. For example, "Annual On-Site Well Maintenance." Maximum length is 255 characters.
Subtotal	Type currency
	Properties Filter, Nillable, Sort
	Description Read only. The total of the work order line items' subtotals before discounts and taxes are applied.
SuggestedMaintenanceDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The suggested date that the work order is completed. When the work order is auto-generated from a maintenance plan, this field is automatically populated based on the maintenance plan's settings.
Tax	Type
	Create, Filter, Nillable, Sort, Update

Field Name	Details
	Description The total tax on the work order. You can enter a number with or without the currency symbol and use up to two decimal places. For example, in a work order whose total price is \$100, enter \$10 to apply a 10% tax.
TotalPrice	Type currency
	Properties Filter, Nillable, Sort
	Description Read only. The total of the work order line items' prices. This value has discounts applied but not tax.
WorkOrderNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description An eight-digit, auto-generated number that identifies the work order.
WorkTypeId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The work type associated with the work order. When a work type is selected, the work order automatically inherits the work type's Duration, Duration Type, and required skills.
	This is a relationship field.
	Relationship Name WorkType
	Relationship Type Lookup
	Refers To WorkType

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

WorkOrderChangeEvent (API version 48.0)

Change events are available for the object.

WorkOrderFeed

Feed tracking is available for the object.

WorkOrderHistory

History is available for tracked fields of the object.

Work Order Owner Sharing Rule

Sharing rules are available for the object.

WorkOrderShare

Sharing is available for the object.

WorkOrderLineItem

Represents a subtask on a work order in field service. This object is available in API version 36.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Work orders or Field Service must be enabled.

Field Name	Details
Address	Type address
	Properties Filter, Nillable
	Description The compound form of the address where the line item is completed.
AssetId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The asset associated with the work order line item. The asset is not automatically inherited from the parent work order.
	This is a relationship field.
	Relationship Name Asset
	Relationship Type Lookup

Field Name	Details
	Refers To
	Asset
AssetWarrantyId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The asset warranty term associated with the work order line item. This field is available in API version 50.0 and above.
City	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The city where the line item is completed. Maximum length is 40 characters.
Country	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The country where the line item is completed. Maximum length is 80 characters.
CurrencyIsoCode	Туре
	picklist
	Properties
	Defaulted on create, Filter, Group, Restricted picklist, Sort
	Description
	Available only for orgs with the multicurrency feature enabled. Contains the ISO
	code for any currency allowed by the organization. The label in the user interface
	is Currency ISO Code.
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	The description of the work order line item. Try to describe the steps needed to mark the line item Completed.

Field Name	Details
Discount	Туре
	percent
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The percent discount to apply to the line item. You can enter a number with or without the percent symbol, and you can use up to two decimal places.
Duration	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The estimated time required to complete the line item. Specify the duration unit in the Duration Type field.
	Note: Work order duration and work order line item duration are independent of each other. If you want work order duration to automatically show the sum of the work order line items' duration, replace the Duration field on work orders with a custom roll-up summary field.
DurationInMinutes	Type double
	Properties Filter, Nillable, Sort
	Description
	The estimated duration in minutes. For internal use only.
DurationType	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The unit of the duration: Minutes or Hours.
EndDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date on which the line item is completed. This field is blank unless you set
	up an Apex trigger or quick action to populate it. For example, you can create a quick action that sets the EndDate to 365 days after the StartDate.

Field Name	Details
GeocodeAccuracy	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The level of accuracy of a location's geographical coordinates compared with in physical address. Usually provided by a geocoding service based on the address latitude and longitude coordinates.
	Note: This field is available in the API only.
	Possible values are:
	• Address
	• Block
	• City
	• County
	• ExtendedZip
	• NearAddress
	Neighborhood
	• State
	• Street
	• Unknown
	• Zip
IsClosed	Туре
	boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether the line item has been closed. Changing the line item's statuto Closed causes this checkbox to be selected in the user interface (sets IsClosed to true).
	? Tip: Use this field to report on closed versus open work order line items
IsGeneratedFromMaintenancePlan	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description
	Identifies whether the work order line item is generated from a maintenance

plan.

Field Name	Details
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the line item was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the line item was last viewed.
Latitude	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Used with Longitude to specify the precise geolocation of the address where the line item is completed. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
	Note: This field is available in the API only.
LineItemNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated number that identifies the work order line item. Each work order's line items start at 1.
ListPrice	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	The price of the line item (product) as listed in its corresponding price book entry. If a price book entry isn't specified, the list price defaults to zero.

Field Name	Details
LocationId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A location associated with the work order line item. For example, a work site.
	This is a relationship field.
	Relationship Name Location
	Relationship Type Lookup
	Refers To
	Location
Longitude	Туре
	double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with Latitude to specify the precise geolocation of the address where the line item is completed. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
	Note: This field is available in the API only.
MaintenancePlanId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The maintenance plan associated with the work order line item.
MaintenanceWorkRuleId	Type
	reference
	Properties Filter, Group, Nillable, Sort
	Description
	ID of the maintenance work rule that generated this line item. This field is available in API version 50.0 and above.

Field Name	Details
MinimumCrewSize	Туре
	int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The minimum crew size allowed for a crew assigned to the line item.
	If you're not using the Field Service managed package, this field serves as a suggestion rather than a rule. If you are using the managed package, the scheduling optimizer counts the number of service crew members on a service crew to determine whether it fits a work order line item's minimum crew size requirement.
OrderId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The order associated with the line item. For example, you may need to order replacement parts before you can complete the line item.
	This is a relationship field.
	Relationship Name Order
	Relationship Type Lookup
	Refers To Order
ParentWorkOrderLineItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The line item's parent work order line item, if it has one.
	? Tip: Create a custom report to view a line item's child line items.
	This is a relationship field.
	Relationship Name ParentWorkOrderLineItem
	Relationship Type Lookup

Field Name	Details
	Refers To WorkOrderLineItem
PostalCode	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The postal code where the line item is completed. Maximum length is 20 characters.
PricebookEntryId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The price book entry (product) associated with the line item. The label in the user interface is Product. This field's lookup search only returns products that are included in the work order's price book.
	This is a relationship field.
	Relationship Name
	PricebookEntry
	Relationship Type Lookup
	Refers To
	PricebookEntry
Priority	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The priority of the line item. The picklist includes the following values, which can be customized:
	• Low
	• Medium
	• High
	• Critical
Product2Id	Туре
	reference

Field Name	Details
	Properties Compatibility Control of the Control of the Compatibility Control of the Co
	Create, Filter, Group, Nillable, Sort, Update
	Description (Read only) The product associated with the price book entry. This field is not available in the user interface. For best results, use the PricebookEntryIc field in any custom code or layouts.
	This is a relationship field.
	Relationship Name Product2
	Relationship Type Lookup
	Refers To Product2
ProductServiceCampaignId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The product service campaign associated with the work order line item.
ProductServiceCampaignItemId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The product service campaign item associated with the work order line item.
Quantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description
	Number of units of the line item included in the associated work order.
RecommendedCrewSize	Туре
	int
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description The recommended number of people on the service crew assigned to the line item. For example, you might have a Minimum Crew Size of 2 and a Recommended Crew Size of 3.
ReturnOrderId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The return order associated with the work order line item.
ReturnOrderLineItemId	Type reference
	Properties Croate Filter Croup Nillable Sort Undate
	Create, Filter, Group, Nillable, Sort, Update Description The return order line item associated with the work order line item.
RootWorkOrderLineItemId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description (Read only) The top-level line item in a work order line item hierarchy. Dependin on where a line item lies in the hierarchy, its root could be the same as its paren
	Note: View a line item's child line items in the Child Work Order Line Items related list.
	This is a relationship field.
	Relationship Name RootWorkOrderLineItem
	Relationship Type Lookup
	Refers To WorkOrderLineItem
ServiceAppointmentCount	Type int
	Properties Filter, Group, Nillable, Sort

Field Name	Details
	Description The number of service appointments on the work order line item.
ServiceReportTemplateId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The service report template that the line item uses. If you don't specify a service report template on a work order line item, it uses the service report template listed on its work type. If the work type doesn't list a template or no work type is specified, the line item uses the default service report template.
ServiceTerritoryId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The service territory where the line item is completed.
	This is a relationship field.
	Relationship Name ServiceTerritory
	Relationship Type Lookup
	Refers To ServiceTerritory
StartDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description
	The date on which the line item goes into effect. This field is blank unless you set up an Apex trigger or quick action to populate it. For example, you can create a quick action that sets the StartDate to the date when the Status changes to In Progress.
State	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description The state where the line item is completed. Maximum length is 80 characters.
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The status of the line item. The picklist includes the following values, which can be customized:
	 New—Line item was created, but there hasn't yet been any activity.
	 In Progress—Work has begun.
	 On Hold—Work is paused.
	 Completed—Work is complete.
	 Cannot Complete—Work could not be completed.
	 Closed—All work and associated activity is complete.
	 Canceled—Work is canceled, typically before any work began.
StatusCategory	Type picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The category that each Status value falls into. The Status Category field has eight default values: seven values which are identical to the default Status values, and a None value for statuses without a status category.
	If you create custom Status values, you must indicate which category it belongs to. For example, if you create a Waiting for Response value, you may decide that it belongs in the On Hold category. To learn which processes reference StatusCategory, see How are Status Categories Used?
Street	Type textarea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The street number and name where the line item is completed.
Subject	Type string

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	A word or phrase describing the line item.
Subtotal	Type currency
	Properties Filter, Nillable, Sort
	Description
	(Read only) The line item's unit price multiplied by the quantity.
SuggestedMaintenanceDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Date when maintenance work is planned.
TotalPrice	Туре
	currency
	Properties Filter Nillable Cost
	Filter, Nillable, Sort
	Description Read only. The line item's subtotal with discounts applied.
UnitPrice	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description Initially, the unit price for a work order line item is the line item's list price from the price book, but you can change it.
WorkOrderId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The line item's parent work order. Because work order line items must be associated with a work order, this is a required field.

Field Name	Details
	This is a relationship field.
	Relationship Name WorkOrder
	Relationship Type Lookup
	Refers To WorkOrder
WorkTypeId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The work type associated with the line item. When a work type is selected, the line item automatically inherits the work type's Duration, Duration Type, and required skills.
	This is a relationship field.
	Relationship Name WorkType
	Relationship Type Lookup
	Refers To WorkType

Usage

A work order line item is a child record of a work order. It represents a specific subtask on a work order.

For example, suppose a customer purchased a truck from you. The truck is represented as an asset in your Salesforce org. After some time, the truck needs both headlight bulbs replaced. Here's one way that you can use work orders and work order line items to track the repair.

- 1. Create a work order named "Replace Headlight Bulbs" from the asset record detail page.
- 2. Add three work order line items to the work order: "Replace Left Headlight Bulb," "Replace Right Headlight Bulb," and "Test Headlights."
- **3.** Assign the work order to a technician via a queue.
- **4.** As the technician completes each line item, he or she marks the item Completed.
- **5.** When all the line items are complete, the technician marks the work order Completed.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

WorkOrderLineItemChangeEvent (API version 48.0)

Change events are available for the object.

WorkOrderLineItemFeed

Feed tracking is available for the object.

WorkOrderLineItemHistory

History is available for tracked fields of the object.

WorkOrderLineItemStatus

Represents a possible status of a work order line item in field service.

Supported Calls

describeSObjects(), query(), retrieve()

Special Access Rules

Field Service must be enabled.

Field Name	Details
ApiName	Type string
	Properties Filter, Group, idLookup, Sort
	Description The API name of the status value.
IsDefault	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates that the status value is the default status on work orders. Only one status value can be the default.
MasterLabel	Type string
	Properties Filter, Group, Nillable, Sort
	Description The label for the picklist value that appears in the UI.

Field Name	Details
SortOrder	Type int
	Properties Filter, Group, Nillable, Sort
	Description The value's position in the drop-down list of values in the UI.
StatusCode	Type picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The status category that the value corresponds to. The Status Category field has seven values which are identical to the default Status values.

Usage

The Status field on work order line items comes with the following values:

- New—Line item was created, but there hasn't yet been any activity.
- In Progress—Work has begun.
- On Hold—Work is paused.
- Completed—Work is complete.
- Cannot Complete—Work could not be completed.
- Closed—All work and associated activity is complete.
- Canceled—Work is canceled, typically before any work began.

The WorkOrderLineItemStatus object corresponds to the Status field. Adding a value to the Status field—for example, Canceled By Customer—creates a work order line item status record, and vice versa.



Note: Work order line items also come with a StatusCategory field whose values are identical to the default Status values. If you create custom Status values, you must indicate which category it belongs to. For example, if you create a <code>Customer Absent</code> value, you may decide that it belongs in the <code>Cannot Complete</code> category. To learn which processes reference StatusCategory, see How are Status Categories Used?

WorkPlan

Represents a work plan for a work order or work order line item. This object is available in API version 52.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field	Details
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description The description of the work plan.
ExecutionOrder	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The order in which plan is executed. Only positive values or null are supported.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
	not viewed it.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the work plan.

Field	Details
OwnerId	Type reference
	15.55
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The ID of the user who created the work plan.
WorkOrderId	Туре
	reference
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Required. The ID of the work order.
WorkOrderLineItemId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the work order line item.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

WorkPlanFeed

Feed tracking is available for the object.

WorkPlanHistory

History is available for tracked fields of the object.

WorkPlanOwnerSharingRule

Sharing rules are available for the object.

WorkPlanShare

Sharing is available for the object.

WorkPlanSelectionRule

Represents a rule that selects a work plan for a work order or work order line item. This object is available in API version 52.0 and later.

Supported Calls

create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),undelete(),update(),upsert()

Special Access Rules

Field Service must be enabled.

Field	Details
AssetId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the asset.
Description	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The description of the selection rule.
IsActive	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Controls whether this selection rule is active (true) or not (false). Default is false. Label is Active .
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
LocationId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the location.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The ID of the owner.
Product2Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the product. Label is Product .
ServiceTerritoryId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the service territory.
WorkPlanSelectionRuleNumber	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The auto-generated number of the work plan selection rule, for example, WPSR-0001.
WorkPlanTemplateId	Туре
	reference

Field	Details
	Properties Create, Filter, Group, Sort, Update
	Description Required. The ID of the work plan template.
WorkTypeId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the work type.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

WorkPlanSelectionRuleFeed

Feed tracking is available for the object.

WorkPlanSelectionRuleHistory

History is available for tracked fields of the object.

Work Plan Selection Rule Owner Sharing Rule

Sharing rules are available for the object.

WorkPlanSelectionRuleShare

Sharing is available for the object.

WorkPlanTemplate

Represents a template for a work plan. This object is available in API version 52.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field	Details	
Description	Type textarea	

Field	Details	
	Properties	
	Create, Nillable, Update	
	Description The description of the work plan template.	
IsActive	Type boolean	
	Properties Create, Defaulted on create, Filter, Group, Sort, Update	
	Description Controls whether the specific template is available for application (true) or not (false). Default is false. Label is Active .	
LastReferencedDate	Type dateTime	
	Properties Filter, Nillable, Sort	
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.	
LastViewedDate	Type dateTime	
	Properties	
	Filter, Nillable, Sort	
	Description	
	The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.	
Name	Type string	
	Properties Create, Filter, Group, idLookup, Sort, Update	
	Description The user-defined name of the work plan template.	
OwnerId	Туре	
	reference	
	Properties Create, Defaulted on create, Filter, Group, Sort, Update	

Field	Details
	Description
	The ID of the owner who created the work plan template.
RelativeExecutionOrder	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The relative execution order for sorting the work plan when it is applied to the work order or work order line item. Only positive integers are supported.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

WorkPlanTemplateFeed

Feed tracking is available for the object.

WorkPlanTemplateHistory

History is available for tracked fields of the object.

WorkPlanTemplateOwnerSharingRule

Sharing rules are available for the object.

Work Plan Template Share

Sharing is available for the object.

WorkPlanTemplateEntry

Represents an object that associates a work step template with a work plan template. This object is available in API version 52.0 and later.

Supported Calls

create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),undelete(),update(),upsert()

Special Access Rules

Field Service must be enabled.

Field	Details
ExecutionOrder	Type int

Field	Details	
	Properties Create, Filter, Group, Nillable, Sort, Update	
	Description The sequence number of when this entry is executed. Only positive values are supported.	
LastReferencedDate	Type dateTime	
	Properties Filter, Nillable, Sort	
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.	
LastViewedDate	Type dateTime	
	Properties Filter, Nillable, Sort	
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.	
WorkPlanTemplateEntryNumber	Type string	
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort	
	Description The auto-generated number of the work plan template entry, for example, WPTE-0001.	
WorkPlanTemplateId	Type reference	
	Properties Create, Filter, Group, Sort	
	Description Required. The ID of the work plan template.	
WorkStepTemplateId	Type reference	
	Properties Create, Filter, Group, Sort, Update	
	Description Required. The ID of the work step template.	

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

Work Plan Template Entry Feed

Feed tracking is available for the object.

Work Plan Template Entry History

History is available for tracked fields of the object.

WorkOrderStatus

Represents a possible status of a work order in field service.

Supported Calls

describeSObjects(), query(), retrieve()

Special Access Rules

Field Service must be enabled.

Field Name	Details
ApiName	Type string
	Properties Filter, Group, idLookup, Sort
	Description The API name of the status value.
IsDefault	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates that the status value is the default status on work orders. Only one status value can be the default.
MasterLabel	Type string
	Properties Filter, Group, Nillable, Sort
	Description The label for the picklist value that appears in the UI.

Field Name	Details
SortOrder	Type int
	Properties Filter, Group, Nillable, Sort
	Description The value's position in the drop-down list of values in the UI.
StatusCode	Type picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The status category that the value corresponds to. The Status Category field has seven values which are identical to the default Status values.

Usage

The Status field on work orders comes with the following values:

- New—Work order was created, but there hasn't yet been any activity.
- In Progress—Work has begun.
- On Hold—Work is paused.
- Completed—Work is complete.
- Cannot Complete—Work could not be completed.
- Closed—All work and associated activity is complete.
- Canceled—Work is canceled, typically before any work began.

The WorkOrderStatus object corresponds to the Status field. Adding a value to the Status field—for example, Canceled By Customer—creates a work order status record, and vice versa.



Note: Work orders also come with a StatusCategory field whose values are identical to the default Status values. If you create custom Status values, you must indicate which category it belongs to. For example, if you create a <code>Customer Absent</code> value, you may decide that it belongs in the <code>Cannot Complete</code> category. To learn which processes reference StatusCategory, see How are Status Categories Used?

WorkStep

Represents a work step in a work plan. This object is available in API version 52.0 and later.

Supported Calls

create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),undelete(),update(),upsert()

Special Access Rules

Field Service must be enabled.

Field	Details
ActionDefinition	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The platform action that the work step executes. The possible values are the names of the flow and quick actions configured in your org.
ActionType	Туре
	picklist
	Properties 5th Committee Described with the Committee Co
	Filter, Group, Nillable, Restricted picklist, Sort
	Description The type of platform action that the work step is associated with.
	Possible values are:
	Flow
	• QuickAction
	Quickecton
Description	Туре
	textarea
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The description of the work step.
EndTime	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date and time the work step ends. The value has to be greater than or equal to
	StartTime.
ExecutionOrder	Туре
	int

Field	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The order in which the work step is executed. Only positive integer values or null are supported.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description Required. The user-defined name of the work step.
PausedFlowInterviewId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The auto-populated ID of the flow interview paused by a user.
StartTime	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update

Field	Details
	Description The date and time the work step starts.
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The customizable status of the work order. Every status must be mapped to a status category but there can be status categories not mapped to a status.
	Possible values are:
	• Completed
	• In Progress
	• New
	• Not Applicable
	• Paused
StatusCategory	Type picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The category that each status value belongs to. Each default status category is mapped to the corresponding default status. If you create a custom status, you must indicate which status category it belongs to. To learn which processes reference StatusCategory, see How are Status Categories Used?.
	Possible values are:
	• Completed
	• InProgress
	• New
	• NotApplicable
	• Paused
WorkOrderId	Type reference
	Properties
	Filter, Group, Sort
	Description The ID of the work order.

Field	Details
WorkOrderLineItemId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The ID of the work order line item.
WorkPlanExecutionOrder	Type int
	Properties Filter, Group, Nillable, Sort
	Description The ID of the plan execution order.
WorkPlanId	Type reference
	Properties Create, Filter, Group, Sort
	Description The ID of the work plan.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

WorkStepFeed

Feed tracking is available for the object.

WorkStepHistory

History is available for tracked fields of the object.

WorkStepStatus

Represents a picklist for a status category on a work step. This object is available in API version 52.0 and later.

Supported Calls

describeSObjects(), query(), retrieve()

Special Access Rules

Field Service must be enabled.

Field	Details
ApiName	Туре
	string
	Properties
	Filter, Group, idLookup, Sort
	Description
	Required. The name of the work step status.
IsDefault	Туре
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	Controls whether this status is the default value of the picklist of the corresponding status
	category (true) or not (false). Default is false.
MasterLabel	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	Required. The label of the work step status.
SortOrder	Туре
	int
	Properties
	Filter, Group, Nillable, Sort
	Description
	Required. The order in which the work step statuses are displayed in the status category's picklist.
StatusCode	Туре
	picklist
	Properties
	Required. Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description
	The status category that this status belongs to.
	Possible values are:
	• Completed
	• InProgress
	11111091000

Field	Details
	• New
	• NotApplicable
	• Paused

WorkStepTemplate

Represents a template for a work step. This object is available in API version 52.0 and later.

Supported Calls

create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),undelete(),update(),upsert()

Special Access Rules

Field Service must be enabled.

Field	Details
ActionDefinition	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The platform action that the work step executes. The possible values are the names of the flow and quick actions configured in your org.
ActionType	Туре
	picklist
	Properties
	Filter, Group, Nillable, Restricted picklist, Sort
	Description
	The type of platform action that the work step is associated with.
	Possible values are:
	• Flow
	• QuickAction
Description	Туре
	textarea
	Properties
	Create, Filter, Nillable, Sort, Update

Field	Details
	Description
	The description of the work step template.
IsActive	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Controls whether this work step tamplate is active true or not false. Default is false.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last accessed this record, a record related to this record,
	or a list view.
LastViewedDate	Tuno
	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null,
	the user might have only accessed this record or list view (LastReferencedDate) but
	not viewed it.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The user-defined name of the work step template.
OwnerId	Type
O miletta	Type reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The ID of the owner who created the work step template.

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

WorkStepTemplateFeed

Feed tracking is available for the object.

WorkStepTemplateHistory

History is available for tracked fields of the object.

Work Step Template Owner Sharing Rule

Sharing rules are available for the object.

Work Step Template Share

Sharing is available for the object.

WorkType

Represents a type of work to be performed in Field Service and Lightning Scheduler. Work types are templates that can be applied to work order or work order line items. This object is available in API version 38.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service must be enabled.

Field Name	Details
Description	Type textarea
	Properties Create, Nillable, Update
	Description The description of the work type. Try to add details about the task or tasks that this work type represents.
DurationType	Type picklist
	Properties Create, Filter, Group, Defaulted on create, Restricted picklist, Sort, Update
	Description The unit of the Estimated Duration: Minutes or Hours.

Field Name	Details
EstimatedDuration	Туре
	double
	Properties
	Create, Filter, Sort, Update
	Description
	The estimated length of the work. The estimated duration is in minutes or hours based on the value selected in the Duration Type field.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	The date when the work type was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description
	The date when the work type was last viewed by the current user.
MinimumCrewSize	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The minimum crew size allowed for a crew assigned to the work. Work orders and work order line items inherit their work type's minimum crew size.
	If you're not using the Field Service managed package, this field serves as a suggestion rather than a rule. If you are using the managed package, the scheduling optimizer counts the number of service crew members on a service crew to determine whether it fits the minimum crew size requirement.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update

Field Name	Details
	Description The name of the work type. Try to use a name that helps users quickly understand the type of work orders that can be created from the work type. For example, "Annual Refrigerator Maintenance" or "Valve Replacement."
OwnerId	Type reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description The work type's owner.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
RecommendedCrewSize	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The recommended number of people on the service crew assigned to the work. For example, you might have a Minimum Crew Size of 2 and a Recommended Crew Size of 3. Work orders and work order line items inherit their work type's recommended crew size.
ServiceReportTemplateId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The service report template associated with the work type. When users create service reports from a work order or work order line item that uses this work type, the reports will use this template.
ShouldAutoCreateSvcAppt	Туре
	boolean
	Properties Create, Filter, Group, Defaulted on create, Sort, Update

Field Name

Details

Description

Select this option to have a service appointment automatically created on work orders and work order line items that use the work type.



Note:

- By default, the Due Date on auto-created service appointments is seven days after the created date. Admins can adjust this offset from the Field Service Settings page in Setup.
- If a work type with the Auto-Create Service Appointment option selected is added to an existing work order or work order line item, a service appointment is only created for the work order or work order line item if it doesn't yet have one.
- If someone updates an existing work type by selecting the Auto-Create Service Appointment option, service appointments aren't created on work orders and work order line items that were already using the work type.

Usage

Adding a work type to a work order or work order line item causes the record to inherit the work type's duration values and required skills and products.



Note:

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

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

WorkTypeChangeEvent (API version 48.0)

Change events are available for the object.

WorkTypeFeed

Feed tracking is available for the object.

WorkTypeHistory

History is available for tracked fields of the object.

WorkTypeOwnerSharingRule

Sharing rules are available for the object.

WorkTypeShare

Sharing is available for the object.

WorkTypeGroup

Represents a grouping of work types used to categorize types of appointments available in Lightning Scheduler, or to define scheduling limits in Field Service. This object is available in API version 45.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
AdditionalInformation	Type multipicklist
	Properties Create, Filter, Nillable, Update
	Description Additional information about the types of appointments this work type group represents.
Description	Type textarea
	Properties Create, Nillable, Update
	Description A description of this work type group.
GroupType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description The category of this work type group. Possible values are:
	 Capacity—A group of work types used to define a work capacity limit in Field Service. Default—A non-capacity group of work types used in Lightning Scheduler.
IsActive	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether this work type group can be used for appointment scheduling or work capacity limits. A work type can belong to only one active work type group of type Capacity.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date and time that the current user last viewed a record related to this object.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this object.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description The name of this work type group.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The ID of the user who created this record.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

WorkTypeGroupFeed

Feed tracking is available for the object.

WorkTypeGroupHistory

History is available for tracked fields of the object.

Work Type Group Owner Sharing Rule

Sharing rules are available for the object.

WorkTypeGroupShare

Sharing is available for the object.

WorkTypeGroupMember

Represents the relationship between a work type and the work type group it belongs to. This object is available in API version 45.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Field	Details
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date and time that the current user last viewed a record related to this object.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this object.
Name	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description Autogenerated number identifying the work type group membership. It uses the format ########.
WorkTypeGroupId	Type reference
	Properties Create, Filter, Group, Sort
	Description The ID of the work type group that this record belongs to.
	This is a relationship field.
	Relationship Name WorkTypeGroup
	Relationship Type Lookup
	Refers To WorkTypeGroup
WorkTypeId	Type reference
	Properties Create, Filter, Group, Sort
	Description The ID of the work type that this record corresponds to.
	This is a relationship field.
	Relationship Name WorkType
	Relationship Type Lookup
	Refers To WorkType

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

Work Type Group Member Feed

Feed tracking is available for the object.

Work Type Group Member History

History is available for tracked fields of the object.

Field Service Custom Fields on Standard Objects

A list of custom fields on standard Salesforce objects installed with the Field Service managed package.

See the Field Service Apex Namespace section for more API references related to the managed package.

IN THIS SECTION:

ResourceAbsence Custom Fields

Custom fields associated with a time period in which a service resource is unavailable to work in Field Service and Lightning Scheduler.

ServiceAppointment Custom Fields

Custom fields associated with an appointment to complete work for a customer in Field Service and Lightning Scheduler.

ServiceResource Custom Fields

Custom fields associated with a field service technician or crew in Field Service and Lightning Scheduler.

ServiceResourceCapacity Custom Fields

Custom fields associated with the maximum number of scheduled hours or number of service appointments that a capacity-based service resource can complete within a specific time period.

ServiceTerritory Custom Fields

Custom fields associated with a geographic or functional region in which field service work can be performed in Field Service and Lightning Scheduler.

TimeSlot Custom Fields

Custom fields associated with a period of time on a specified day of the week during which field service work can be performed in Field Service and Lightning Scheduler. Operating hours consist of one or more time slots.

WorkOrder Custom Fields

Custom fields associated with field service work to be performed for a customer.

WorkOrderLineItem Custom Fields

Custom fields associated with a subtask on a work order in field service.

ResourceAbsence Custom Fields

Custom fields associated with a time period in which a service resource is unavailable to work in Field Service and Lightning Scheduler. The standard fields are documented in the ResourceAbsence object reference.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()

Special Access Rules

Field Service managed package must be installed.

Fields

Field	Details

FSL_Approved_c

Type

boolean

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

When this field is true and the **Activate approval confirmation on resource absences** setting is enabled, the resource absence appears in the dispatcher console's Gantt chart and is considered by the scheduler. When this field is false and the setting is enabled, the resource absence doesn't appear in the Gantt chart and is ignored by the scheduler.

The default value is false.

For more info, view the View Resource Absences on the Gantt and Map Help article.

FSL__Duration_In Minutes c

Type

double

Properties

Filter, Nillable, Sort

Description

The duration of the resource absence in minutes. This field is automatically populated after the resource absence is created.

This is a calculated field.

Formula

IF (ISBLANK(Start), 0, (End - Start) *24*60)

FSL__EstTravelTime
From__c

Type

double

Properties

Create, Filter, Nillable, Sort, Update

Description

The estimated travel time from the service resource's absence location to their home base. For this field, the absence location must have latitude and longitude coordinates and be the last location of the day. If it doesn't have coordinates, isn't the last location of the day, or the travel calculations are disabled, this field is 0.

FSL EstTravelTime c

Type

double

Properties

Create, Filter, Nillable, Sort, Update

Field

Details

Description

The estimated time to the service resource's absence location from a service appointment or another resource absence location. For this field, the absence location must have latitude and longitude coordinates. If it doesn't have latitude and longitude coordinates or the travel calculations are disabled, this field is 0.

FSL__EstimatedTravel DistanceFrom__c

Type

double

Properties

Create, Filter, Nillable, Sort, Update

Description

The estimated travel distance from the service resource's absence location to their home base. For this field, the absence location must have latitude and longitude coordinates and be the last location of the day. If it doesn't have coordinates, isn't the last location of the day, or the travel calculations are disabled, this field is 0.

FSL__EstimatedTravel
DistanceTo__c

Type

double

Properties

Create, Filter, Nillable, Sort, Update

Description

The estimated travel distance to service resource's absence location from a service appointment or another resource absence location. For this field, the absence location must have latitude and longitude coordinate. If it doesn't have latitude and longitude coordinates or the travel calculations are disabled, this field is 0.

```
FSL__Estimated_Travel_
Time_From_Source__c
```

Type

picklist

Properties

Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Description

The method used to calculate the travel time from the service resource's absence location to a service appointment or another resource absence location. For this field, the absence location must have latitude and longitude coordinates and be the last location of the day. If it doesn't have coordinates, isn't the last location of the day, or the travel calculations are disabled, this field is None.

Possible values are:

- Aerial
- None
- Predictive
- SLR

Field

Details

FSL__Estimated_Travel_
Time_To_Source__c

Type

picklist

Properties

Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Description

The method used to calculate the travel time to this service resource's absence location from a service appointment or another resource absence location. For this field, the absence location must have latitude and longitude coordinates. If it doesn't have latitude and longitude coordinates or the travel calculations are disabled, this field is None.

Possible values are:

- Aerial
- None
- Predictive
- SLR

FSL__GanttLabel__c

Type

string

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

The label of the resource absence in the Field Service dispatcher console's Gantt chart and resource calendar. This replaces the resource absence's number in the chart.

FSL Gantt Color c

Type

string

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

The Hex color of the resource absence in Field Service dispatcher console's Gantt chart and resource calendar.

FSL__Scheduling_ Policy Used c

Type

reference

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

A scheduling policy used by the scheduler for the service appointment. This policy overrides the default one in the Field Service Settings page or the one that the scheduler would otherwise select. This is used for travel calculations.

This is a relationship field.

Field	Details
	Relationship Name FSLScheduling_Policy_Usedr
	Relationship Type Lookup
	Refers To FSLScheduling_Policyc

Internal Fields

These internal fields are used by the Field Service managed package for Street Level Routing calculations. Although they're publicly accessible, they must only be updated by the managed package.

- FSL__InternalSLRGeolocation__Latitude__s
- FSL__InternalSLRGeolocation__Longitude__s
- FSL__InternalSLRGeolocation__c

SEE ALSO:

Salesforce Object Reference: Resource Absence
Salesforce Help: View Resource Absences on the Gantt and Map

ServiceAppointment Custom Fields

Custom fields associated with an appointment to complete work for a customer in Field Service and Lightning Scheduler.

The standard fields are documented in the ServiceAppointment object reference.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service managed package must be installed.

Field	Details
FSLAppointment_ Gradec	Type double
	Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The appointment grade of the scheduled appointment using the Appointment Booking feature.
FSL_Auto_Schedulec	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if the appointment is created and scheduled in the same action.
	The default value is false.
	For more info, view the Schedule an Appointment Automatically Help article.
FSLDuration_In_ Minutesc	Type double
	Properties Filter, Nillable, Sort
	Description The duration in minutes of the scheduled appointment. It calculates the time between the scheduled start and end times in minutes.
	This is a calculated field.
	Formula
	<pre>IF (ISBLANK(SchedStartTime), 0, (SchedEndTime - SchedStartTime)*24*60)</pre>
FSLEmergencyc	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if the Emergency Wizard global action schedules the appointment. If true, the service appointment has an emergency icon in the Field Service dispatcher console's Gant chart.
	The default value is false.
FSLGanttColorc	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The Hex color of the service appointment in the Field Service dispatcher console's Gantt chart and the resource calendar.
FSLGanttIconc	Type textarea
	Properties Create, Nillable, Update
	Description A custom icon for the service appointment that appears in the Gantt chart, map, and appointment list. This helps dispatchers quickly identify appointment characteristics. For example, use a custom icon to indicate that an appointment is for a VIP or first-time customer. The format is a URL ending in an image suffix, such as .png or .gif. The image is scaled to 16 x 16 pixels.
	For more info, view the Create Custom Appointment Icons Help article.
FSLGanttLabelc	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The label of the scheduled service appointment in the Field Service dispatcher console's Gantt chart. This replaces the service appointment number in the chart.
FSLGantt_Display_ Datec	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The Gantt Display Date filter in the date field dropdown menu in the Field Service dispatcher console to control which appointments are visible in the appointment list. When a service appointment's Gantt Display Date falls within the Gantt time frame, the appointment is visible on the Gantt. For example, if a maintenance appointment must be completed within the next six months, you can set the date so that you see it on the Gantt every day. You can set up this field to update an important appointment's Gantt Display Date to today's date on a daily basis.
	For more info, view the Control Which Appointments Appear in the Dispatcher Console Help article.
FSLInJeopardy Reasonc	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field Details

Description

The reason for when the service appointment is in jeopardy. Use this field only when the FSL InJeopardy c status is true. You can add custom picklist values.

Possible values are:

- Delayed Finish
- Delayed Start
- Due Date Approaching
- No Response
- Rejected by Contractor

FSL InJeopardy c

Type

boolean

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

Determines if a service appointment is in jeopardy. This helps dispatchers gain visibility to service appointments at risk. A user can manually set the service appointment status to **In Jeopardy** or this can be done automatically using, for example, process builders or triggers.

The default value is false.

FSL__IsFillIn Candidate__c

Type

boolean

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

Determines if this service appointment is considered as a candidate when filling in a schedule with the Fill-In Schedule feature. If a service appointment's parent record is a work order or work order line item, the parent record's FSL__IsFillInCandidate__c field must also be set to true for the appointment to be a candidate. Alternatively, instead of using this field, you can create a custom checkbox field, including formula fields, to evaluate whether this appointment is considered as a candidate. This can be done through the Field Service Settings page

The default value is true.

For more info, view the Fill Schedule Gaps Help article.

FSL_IsMultiDay__c

Type

boolean

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Field

Details

Description

Determines if this service appointment spans over multiple days. Alternatively, instead of using this field, you can create a checkbox formula field through the Field Service Settings page to evaluate whether it spans over multiple days or not.

The default value is false.

For more info, view the Enable Multiday Service Appointments Help article.

FSL__Pinned__c

Type

boolean

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

Determines if this service appointment is pinned to the Field Service dispatcher console's Gantt chart. Pinned service appointments can't be manually dragged or automatically scheduled by any scheduling operation. Pinned service appointments have a lock icon in the Field Service dispatcher console's Gantt chart.

The default value is false.

FSL__Prevent_ Geocoding_For_Chatter_ Actions__c

Type

boolean

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

Determines if the service appointment's BeforeUpdate Platform Apex trigger disables the Chatter Actions's geolocation cleanup on address change. When this field is set to true, it prevents Chatter Actions to geocode the address and waits until Field Service does it after the address changes. This field is set to false after the cleanup completes.

The default value is false.

FSL__Schedule_Mode__c

Type

picklist

Properties

Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Description

The type of the scheduling operation. For example, if the service appointment is scheduled using drag and drop, the value is Manual. If the service appointment is scheduled using the Appointment Booking feature, the value is Automatic. This field is populated by the system. Don't edit this field.

Possible values are:

- Automatic
- Manual

Details Field None Optimization The default value is 'None'. FSL Schedule over Type lower_priority_ boolean appointment c **Properties** Create, Defaulted on create, Filter, Group, Sort, Update Description Determines whether you can schedule critical service appointments over lower priority appointments. The default value is false. For more info, view the Schedule Appointments Using Priorities Help article. FSL Scheduling Type Policy Used c reference **Properties** Create, Filter, Group, Nillable, Sort, Update Description A scheduling policy used by the scheduler for the service appointment. If you edit this field, the policy overrides the default one on the Field Service Settings page. If this field is empty, the field populates with the policy used by the scheduler after the service appointment gets scheduled. This is a relationship field. **Relationship Name** FSL__Scheduling_Policy_Used__r **Relationship Type** Lookup Refers To FSL__Scheduling_Policy__c FSL UpdatedBy Type Optimization c boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update Description Determines if the service appointment is updated by the optimizer. This field is populated by the system. Don't edit this field. The default value is false.

Field	Details
FSLUse_Async_Logicc	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Determines if the scheduling features related to the service appointment run asynchronously. If you use UI features, such as the Appointment Booking global action, the managed package takes care of this async response for you.
	The default value is false.
FSLVirtual_Service_ For_Chatter_Actionc	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Determines if the service appointment is a candidate or dummy appointment. If the value is true, the appointment is ignored by your custom triggers. This field is populated by the system. Don't edit this field.
	The default value is false.

Internal Fields

These internal fields are used by the Field Service managed package for Street Level Routing calculations. Although they're publicly accessible, they must only be updated by the managed package.

- FSL__InternalSLRGeolocation__Latitude__s
- FSL__InternalSLRGeolocation__Longitude__s
- FSL__InternalSLRGeolocation__c

SEE ALSO:

Salesforce Object Reference: ServiceAppointment

Salesforce Help: Schedule an Appointment Automatically

Salesforce Help: Create Custom Appointment Icons

Salesforce Help: Control Which Appointments Appear in the Dispatcher Console

Salesforce Help: Fill Schedule Gaps

Salesforce Help: Enable Multiday Service Appointments
Salesforce Help: Schedule Appointments Using Priorities

ServiceResource Custom Fields

Custom fields associated with a field service technician or crew in Field Service and Lightning Scheduler.

The standard fields are documented in the ServiceResource object reference.

Supported Calls

create(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(),
search(), update(), upsert()

Special Access Rules

Field Service managed package must be installed.

Field	Details
FSLEfficiencyc	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The efficiency score or the work pace of the service resource. Enter a value from 0.1 to 10. An efficiency of 1 (default) means that the mobile worker works at a typical or average speed. An efficiency greater than 1 means that the mobile worker works faster than average. Less than 1 means that the mobile worker works slower than average.
	For more info, view the Estimate a Service Resource's Efficiency Help article.
FSLGanttLabelc	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The description of the service resource in the Field Service dispatcher console's Gantt chart. This is shown under the service resource's name in the chart.
FSLOnline_Offsetc	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The offset of how long the service resource is considered online since they last used or logged into the mobile app. This overrides the default value in the Field Service Settings page.
FSLPicture_Linkc	Туре
	url Proportion
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The URL link to the customer's picture used as the avatar in the Field Service dispatcher console's Gantt chart. If no URL is provided here, the Gantt chart uses the user avatar.
FSLPriorityc	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The priority of the service resource used to rank their appointments. The lower the number the higher the priority.
FSLTravel_Speedc	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The average aerial travel speed of the service resource used to calculate the aerial travel time. This field overrides the default value in the Field Service Settings page. The units, selected in the Field Service Settings page, are KPH or MPH. Street level routing and predictive travel calculations don't use this field. They have their own settings.

SEE ALSO:

Salesforce Object Reference: ServiceResource
Salesforce Help: Estimate a Service Resource's Efficiency

ServiceResourceCapacity Custom Fields

Custom fields associated with the maximum number of scheduled hours or number of service appointments that a capacity-based service resource can complete within a specific time period.

The standard fields are documented in the ServiceResourceCapacity object reference.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()

Special Access Rules

Field Service managed package must be installed.

Fields

Field

Details

FSL HoursInUse c

Type

double

Properties

Filter, Nillable, Sort

Description

The total number of hours of scheduled services occupied by the service resource. This is used by the Field Service dispatcher console to show how much resource capacity is used up and by the scheduler to prevent offering resources whose capacity is full. This field is updated when the scheduler runs and updates the FSL__MinutesUsed__c field.

This is a calculated field.

Formula

FSL_MinutesUsed_c / 60

FSL__Last_Updated_ Epoch c

Type

double

Properties

Create, Filter, Nillable, Sort, Update

Description

The date and time, in Epoch format, that the Capacity object was last updated. The Capacity object is updated when a service is scheduled on a capacity-based resource. This field is used by the Field Service dispatcher console.

 ${\tt FSL_MinutesUsed_c}$

Type

double

Properties

Create, Filter, Nillable, Sort, Update

Description

The total number of minutes of scheduled services occupies by the service resource. This is used by the Field Service dispatcher console to show how much resource capacity is used up and by the scheduler to prevent offering resources whose capacity is full.

FSL__Work_Items_
Allocated c

Type

double

Properties

Create, Filter, Nillable, Sort, Update

Field	Details
	Description
	The number of scheduled service appointments that fill the capacity. This is used by the Field Service dispatcher console to show how much resource capacity is used up.

SEE ALSO:

Salesforce Object Reference: ServiceResourceCapacity

ServiceTerritory Custom Fields

Custom fields associated with a geographic or functional region in which field service work can be performed in Field Service and Lightning Scheduler.

The standard fields are documented in the ServiceTerritory object reference.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service managed package must be installed.

Fields

Field	Details
FSLHide_Emergency_ Mapc	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Controls if the Emergency Wizard map used by the Emergency Wizard global action is hidden for a service territory. This is for privacy purposes. If this is true, it shows a list of appointments with estimated time of arrivals instead. The default value is false.
FSLNumberOfServices ToDripFeedc	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The drip feed rate to dispatch appointments. This is part of the drip feed dispatching feature. This value overrides the default value in the Field Service Settings page.

Field	Details
	For more info, view the Drip Feed Service Appointments Help article.
FSLSystem_Jobsc	Type multipicklist
	Properties Create, Filter, Nillable, Update
	Description The list of automators for scheduling jobs associated with a single territory. Possible values are the default or custom automator names configured in the Field Service Settings page. For example, if you create an optimization automator for Los Angeles called "LA_Optimize_1", this field is populated with LA_Optimize_1 for the LA service territory. This field is populated by the system. Don't edit this field.
FSLTerritoryLevelc	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The territory hierarchy level of the polygon defining the service territory. A polygon is a custom shape drawn on the map to define the area of the territory. It can be nested inside another polygon creating a hierarchy. This field is populated by the system. Don't edit this field.

Internal Fields

These internal fields are used by the Field Service managed package for Street Level Routing calculations. Although they're publicly accessible, they must only be updated by the managed package.

- FSL__Internal_SLRGeolocation__Latitude__s
- FSL__Internal_SLRGeolocation__Longitude__s
- FSL__Internal_SLRGeolocation__c

SEE ALSO:

Salesforce Object Reference: ServiceTerritory
Salesforce Help: Drip Feed Service Appointments

TimeSlot Custom Fields

Custom fields associated with a period of time on a specified day of the week during which field service work can be performed in Field Service and Lightning Scheduler. Operating hours consist of one or more time slots.

The standard fields are documented in the TimeSlot object reference.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), update(), upsert()

Special Access Rules

Field Service managed package must be installed.

Fields

Field

FSL__Designated_Work_
Boolean_Fields__c

Туре

multipicklist

Properties

Create, Filter, Nillable, Update

Description

The type of designated work time slot. To convert a regular time slot to a designated one, use the calendar editor in the Visualforce page instead of editing this field manually in the record page.

Possible values are:

None—Default

Additional values are added by the managed package when a time slot is converted to a designated work type. The values are the API names of the designated work boolean fields on the service appointment.

FSL Slot Color c

Type

picklist

Properties

Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Description

The time slot color as it appears on the calendar editor in the Visualforce page. This field is populated by the system.

Possible values are:

- Amber
- Asphalt
- Black
- Blue
- Brown
- Cyan
- Green
- Grey
- Indigo

 Lime Orange Pink Purple Red Teal Yellow 	Field	Details	
PinkPurpleRedTeal		• Lime	
PurpleRedTeal		• Orange	
RedTeal		• Pink	
• Teal		• Purple	
		• Red	
• Yellow		• Teal	
		• Yellow	

SEE ALSO:

Salesforce Object Reference: TimeSlot

WorkOrder Custom Fields

Custom fields associated with field service work to be performed for a customer.

The standard fields are documented in the WorkOrder object reference.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service managed package must be installed.

Fields

Field	Details
FSLIsFillIn Candidatec	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Determines if this work order is considered as a candidate when filling in a schedule with the Fill-In Schedule feature. If a service appointment's parent record is a work order, this field must also be set to true for the appointment to be a candidate. Alternatively, you can create a custom checkbox field through the Field Service Settings page, instead of using this field, to evaluate whether this appointment is considered as a candidate. The custom checkbox field includes formula fields.
	The default value is true.
	For more info, view the Fill Schedule Gaps Help article.

Field Details

FSL__Prevent_ Geocoding_For_Chatter_ Actions__c

Type

boolean

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

Determines if the work order's BeforeUpdate trigger disables the Chatter Action's geolocation cleanup on address change. This field is set to false after the cleanup completes.

The default value is false.

FSL__Scheduling_ Priority c

Type

double

Properties

Filter, Nillable, Sort

Description

The work order priority. The lower the value, the higher the priority.

For more info, view the Schedule Appointments Using Priorities Help article.

This is a calculated field.

Formula

```
CASE(TEXT(Priority), 'Critical', 1, 'High', 2, 'Medium', 3, 'Low', 4, null)
```

```
FSL VisitingHours c
```

Type

reference

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

The visiting hours that define when service appointments associated with the work order can be scheduled. The visiting hours are enforced as long as the Visiting Hours work rule complies with the scheduling policy. Visiting hours are enforced only if the Visiting Hours work rule is part of the scheduling policy.

For more info, view the Work Rule Type: Service Appointment Visiting Hours Help article.

This is a relationship field.

Relationship Name

FSL__VisitingHours__r

Relationship Type

Lookup

Field	Details
	Refers To Operating Hours

SEE ALSO:

Salesforce Object Reference: WorkOrder

Salesforce Help: Fill Schedule Gaps

Salesforce Help: Schedule Appointments Using Priorities

Salesforce Help: Work Rule Type: Service Appointment Visiting Hours

WorkOrderLineItem Custom Fields

Custom fields associated with a subtask on a work order in field service.

The standard fields are documented in the WorkOrderLineItem object reference.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Field Service managed package must be installed.

Fields

Field Details	
FSLIsFillIn Candidatec	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Determines if this work order line item is considered as a candidate when filling in a schedule with the Fill-In Schedule feature. If a service appointment's parent record is a work order line item, this field must also be set to true for the appointment to be a candidate. Alternatively, you can create a custom checkbox field through the Field Service Settings page, instead of using this field, to evaluate whether this appointment is considered as a candidate. The custom checkbox field includes formula fields.
	The default value is true.
	For more info, view the Fill Schedule Gaps Help article.

reference

Field Details

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

The visiting hours that define when service appointments associated with the work order line item can be scheduled. Visiting hours are enforced only if the Visiting Hours work rule is part of the scheduling policy.

For more info, view the Work Rule Type: Service Appointment Visiting Hours Help article.

This is a relationship field.

Relationship Name

FSL__VisitingHours__r

Relationship Type

Lookup

Refers To

OperatingHours

SEE ALSO:

Salesforce Object Reference: WorkOrderLineItem

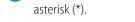
Salesforce Help: Fill Schedule Gaps

Salesforce Help: Work Rule Type: Service Appointment Visiting Hours

Supplementary Field Service Objects

A list of Field Service objects that support history tracking or sharing.

The following list links to reference information for these supplementary objects.



- AssetOwnerSharingRule*
- AssetShare*
- LinkedArticleHistory
- MaintenanceWorkRuleFeed
- MaintenanceWorkRuleHistory
- MaintenanceWorkRuleOwnerSharingRule
- MaintenanceWorkRuleShare
- OperatingHoursHistory
- ProductRequestHistory
- ProductRequestOwnerSharingRule
- ProductRequestShare
- ProductServiceCampaignFeed
- ProductServiceCampaignHistory

Note: Most objects are available only if Field Service is enabled. Objects not tied to Field Service enablement are shown with an

- ProductServiceCampaignOwnerSharingRule
- ProductServiceCampaignShare
- ProductServiceCampaignItemFeed
- ProductServiceCampaignItemHistory
- ProductServiceCampaignItemOwnerSharingRule
- ProductServiceCampaignItemShare
- ProductTransferHistory
- ProductTransferOwnerSharingRule
- ProductTransferShare
- ResourceAbsenceHistory
- ResourcePreferenceHistory
- ReturnOrderHistory
- ReturnOrderLineItemHistory
- ReturnOrderOwnerSharingRule
- ReturnOrderShare
- ServiceAppointmentHistory
- ServiceAppointmentOwnerSharingRule
- ServiceAppointmentShare
- ServiceCrewHistory
- ServiceCrewMemberHistory
- ServiceCrewOwnerSharingRule
- ServiceCrewShare
- ServiceResourceCapacityHistory
- ServiceResourceHistory
- ServiceResourceOwnerSharingRule
- ServiceResourceShare
- ServiceResourceSkillHistory
- ServiceTerritoryHistory
- ServiceTerritoryMemberHistory
- SkillRequirementHistory
- TimeSheetEntryHistory
- TimeSheetHistory
- TimeSheetOwnerSharingRule
- TimeSheetShare
- TimeSlotHistory
- WorkOrderHistory*
- WorkOrderLineItemHistory*
- WorkOrderShare*
- WorkTypeGroupHistory
- WorkTypeGroupMemberHistory

- WorkTypeGroupShare
- WorkTypeHistory
- WorkTypeOwnerSharingRule
- WorkTypeShare

Field Service REST API

The following endpoints can be used to manage your field service implementation.

IN THIS SECTION:

Field Service Flow

Returns information corresponding to a field service flow. This resource is available in REST API version 42.0 and later.

Field Service Mobile Settings

Returns information about the Field Service mobile app settings assigned to the profile of the context user. This resource is available in REST API version 42.0 and later.

Service Report Template

Returns information corresponding to one or more service report templates in field service. This resource is available in REST API version 40.0 and later.

sObject Suggested Articles

Returns a list of suggested Salesforce Knowledge articles for a case, work order, or work order line item.

Appointment Bundling

Use the Appointment Bundling REST APIs to create bundles, start the automated process for creating bundles, unbundle one or more bundles, and update a bundle.

Field Service Flow

Returns information corresponding to a field service flow. This resource is available in REST API version 42.0 and later.

This resource accepts the API name of a flow definition and returns information about the active flow version. If no flow version is activated, the most recent version is returned. Flow elements can be translated to the language of the user invoking this API by using Translation Workbench. If a particular flow version's elements have been translated, the data returned uses the language of the query. To learn more, see Flow Components in Translation Workbench.

This resource is available to API users with Field Service mobile app user permissions and the Run Flows user permission.

URI

/services/data/vXX.X/support/fieldservice/Flow?developerNames=Flow Unique Name

Formats

JSON, XML

HTTP Method

GFT

Authentication

Authorization: Bearer token

Parameters

Paramete	r	Description
develope		The unique name for the flow definition. Currently, you can
		specify only one unique name using this parameter.

Response Body

The following table describes the main elements of the response body.

Field		Туре	Description
Flows		Array	List of flows
Created	lDate	String	Date the flow was created
Descrip	tion	String	Description of the flow
FullNan	ne	String	Full name for the flow
ld		String	Unique ID for the flow
LastMo	difiedDate	String	Date the flow was last modified
Metada	ta		
	Choices	Array	List of choices used by fields
	ChoiceText	String	Text of choice
	DataType	String	Data type of choice
	Name	String	Name for the choice
	Screens	Array of objects	List of screens for the flow
	AllowBack	Boolean	Whether you can go back from the screen
	AllowFinish	Boolean	Whether you can finish the flow from the screen
	AllowPause	Boolean	Whether you can pause from the screen
	Fields	Array of objects	List of fields used by the screen
	HelpText	String	Help text for the screen
	Label	String	Label for the screen
	LocationX	Number	X coordinate for the screen
	LocationY	Number	Y coordinate for the screen
	Name	String	Name of the screen
Process	Туре	String	Type of process for the flow; in this case, it should be "FieldServiceMobile"

Field	Туре	Description
Status	String	Status of the flow
VersionNumber	Number	Version number for the flow



Example: This sample request uses the unique name "FS_Flow" for the flow definition.

The response contains two screens:

- Screen 1
- Screen 2

Screen 1 has two fields:

- Field 1: a text field
- RadioButton: a field with two choices

Screen 2 has one field:

Field 2: a text field

Request

GET

/services/data/v42.0/support/fieldservice/Flow?developerNames=FS Flow

Response

```
"flows" : [ {
 "Id" : "301R00000008grIAA",
 "DefinitionId" : "300R00000040LFIA2",
 "MasterLabel" : "FS Flow",
 "ManageableState" : "unmanaged",
 "VersionNumber" : 1,
 "Status" : "Draft",
 "Description" : "FS Flow",
 "ProcessType" : "FieldServiceMobile",
 "CreatedDate": "2017-12-05T19:22:16.000+0000",
 "CreatedById" : "005R000000J2glIAC",
 "LastModifiedDate": "2017-12-05T19:22:16.000+0000",
 "LastModifiedById" : "005R000000J2glIAC",
 "Metadata" : {
    "actionCalls" : null,
    "apexPluginCalls" : null,
    "assignments" : null,
    "choices" : [ {
      "choiceText" : "Choice A",
      "dataType" : "String",
      "description" : null,
      "name" : "Choice_A",
      "processMetadataValues" : null,
      "userInput" : null,
      "value" : null
    }, {
      "choiceText" : "Choice B",
```

```
"dataType" : "String",
  "description" : null,
  "name" : "Choice B",
  "processMetadataValues" : null,
  "userInput" : null,
  "value" : null
} ],
"constants" : null,
"decisions" : null,
"description" : "FS Flow",
"dynamicChoiceSets" : null,
"formulas" : null,
"fullName" : "FS Flow-1",
"interviewLabel" : "FS Flow {!$Flow.CurrentDateTime}",
"label" : "FS Flow",
"loops" : null,
"module" : null,
"processMetadataValues" : null,
"processType" : "FieldServiceMobile",
"recordCreates" : null,
"recordDeletes" : null,
"recordLookups" : null,
"recordUpdates" : null,
"screens" : [ {
  "allowBack" : true,
  "allowFinish" : true,
  "allowPause" : true,
  "connector" : {
   "processMetadataValues" : null,
    "targetReference" : "Screen_2"
  "description" : null,
  "fields" : [ {
    "choiceReferences" : null,
    "dataType" : "String",
    "defaultSelectedChoiceReference" : null,
    "defaultValue" : null,
    "description" : null,
    "extensionName" : null,
    "fieldText" : "Field 1",
    "fieldType" : "InputField",
    "helpText" : "Help Text 1",
    "inputParameters" : [ ],
    "isRequired" : false,
    "isVisible" : null,
    "name" : "Field 1",
    "outputParameters" : [ ],
    "processMetadataValues" : null,
    "scale" : null,
    "validationRule" : null
    "choiceReferences" : [ "Choice A", "Choice B" ],
    "dataType" : "String",
    "defaultSelectedChoiceReference" : null,
```

```
"defaultValue" : null,
    "description" : null,
    "extensionName" : null,
    "fieldText" : "Pick a choice",
    "fieldType" : "RadioButtons",
    "helpText" : "Pick a Choice help text",
    "inputParameters" : [ ],
    "isRequired" : false,
   "isVisible" : null,
   "name" : "Pick_a_choice",
    "outputParameters" : [ ],
   "processMetadataValues" : null,
    "scale" : null,
    "validationRule" : null
  } ],
  "helpText" : null,
  "label" : "Screen 1",
  "locationX" : 189,
  "locationY" : 178,
  "name" : "Screen 1",
  "pausedText" : null,
  "processMetadataValues" : null,
  "rules" : null,
  "showFooter" : true,
  "showHeader" : true
}, {
  "allowBack" : true,
  "allowFinish" : true,
  "allowPause" : true,
  "connector" : null,
  "description" : null,
  "fields" : [ {
    "choiceReferences" : null,
    "dataType" : "String",
    "defaultSelectedChoiceReference" : null,
    "defaultValue" : null,
   "description" : null,
    "extensionName" : null,
   "fieldText" : "Field 1",
   "fieldType" : "InputField",
   "helpText" : null,
    "inputParameters" : [ ],
   "isRequired" : false,
   "isVisible" : null,
    "name" : "Field 1",
    "outputParameters" : [ ],
    "processMetadataValues" : null,
    "scale" : null,
    "validationRule" : null
  } ],
  "helpText" : null,
  "label" : "Screen 2",
  "locationX" : 437,
  "locationY" : 289,
```

```
"name" : "Screen 2",
      "pausedText" : null,
      "processMetadataValues" : null,
      "rules" : null,
      "showFooter" : true,
      "showHeader" : true
    } ],
    "startElementReference" : "Screen 1",
    "steps" : null,
    "subflows" : null,
    "textTemplates" : null,
    "urls" : null,
    "variables" : null,
    "waits" : null
  },
  "FullName" : "FS_Flow-1"
} ]
```

Field Service Mobile Settings

Returns information about the Field Service mobile app settings assigned to the profile of the context user. This resource is available in REST API version 42.0 and later.

The Field Service mobile app for Android and iOS comes with a variety of customizable settings, including branding colors, geolocation accuracy, app extensions, and date picker display. You can assign unique configurations of those settings to user profiles for a customized Field Service mobile experience. For example, configure separate settings to address the mobile needs of contractors, technicians of varying levels, and service crew leaders.

The FieldServiceMobileSettings object represents a configuration of the mobile app settings. The assignment of a settings configuration to a user profile is stored in a child object, MobileSettingsAssignment. A FieldServiceMobileSettings record can also have zero or more child AppExtension records. The userSettings extension enables the return of user profile settings information.

Each user profile can be associated with only one FieldServiceMobileSettings record. If a user's profile isn't explicitly assigned a settings record, the profile uses the default settings.

This resource returns information about the FieldServiceMobileApp settings assigned to the profile of the user in the context of which the call is made. It is available in orgs where Field Service is enabled, and can be used for users who have one or more of the following:

- Field Service Mobile permission set license
- View Setup user permission
- Customize Application user permission
- System Administrator profile

This resource can also be executed in the context of an Experience Builder site user with the Field Service Mobile permission set license.

URI

/services/data/vXX.X/sobjects/FieldServiceMobileSettings/userSettings

Formats

JSON, XML

HTTP Method

GET

Authentication

Authorization: Bearer token

Parameters

None.

Response Body

A FieldServiceMobileSettings record contains the following properties. All string properties have a maximum length of 7 characters unless otherwise noted. For descriptions, see FieldServiceMobileSettings in the *Salesforce Object Reference*.

Field	Туре
BgGeoLocationAccuracy	Enum
	Values: Medium, Coarse, VeryCoarse
BgGeoLocationMinUpdateFreqMins	Integer
BrandInvertedColor	String
ContrastInvertedColor	String
ContrastPrimaryColor	String
ContrastQuaternaryColor	String
ContrastQuinaryColor	String
ContrastSecondaryColor	String
ContrastTertiaryColor	String
DefaultListViewDeveloperName	String (maximum length: 255)
FeedbackPrimaryColor	String
FeedbackSecondaryColor	String
FeedbackSelectedColor	String
FutureDaysInDatePicker	Integer
GeoLocationAccuracy	Enum
	Values: Fine, Medium, Coarse
GeoLocationMinUpdateFreqMins	Integer
Id	String
IsAssignmentNotification	Boolean
IsDefault	Boolean
IsDispatchNotification	Boolean

Field	Туре
IsScheduleViewResourceAbsences (Beta)	Boolean
	Available in API version 55.0 and later.
	Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.
IsSendLocationHistory	Boolean
IsShowEditFullRecord	Boolean
IsUseSalesforceMobileActions	Boolean
MetadataCacheTimeDays	Integer
NavbarBackgroundColor	String
NavbarInvertedColor	String
PastDaysInDatePicker	Integer
PrimaryBrandColor	String
RecordDataCacheTimeMins	Integer
SecondaryBrandColor	String
TimeIntervalSetupMins	Enum Values: 1, 5, 15, 20, 30, 60
UpdateScheduleTimeMins	Integer

If any of the following is true, an error message is returned:

- The user does not have access to FieldServiceMobileSettings
- Field Service is not enabled in the org
- An internal server error occurs



Request

GET

/services/data/v46.0/sobjects/FieldServiceMobileSettings/userSettings

Response

```
"attributes" : {
   "type" : "FieldServiceMobileSettings",
   "url" :
"/services/data/v46.0/sobjects/FieldServiceMobileSettings/OMfRM0000000rpR0AQ"
 },
```

```
"Id" : "0MfRM0000000rpR0AQ",
"IsDeleted" : false,
"DeveloperName" : "Field Service Mobile Settings",
"Language" : "en US",
"MasterLabel" : "Field Service Mobile Settings",
"CreatedDate": "2019-02-17T05:20:47.000+0000",
"CreatedById" : "005RM000001hTsLYAU",
"LastModifiedDate": "2019-03-22T22:48:17.000+0000",
"LastModifiedById": "005RM000001k2kpYAA",
"SystemModstamp": "2019-03-22T22:48:17.000+0000",
"NavbarBackgroundColor" : "#803ABE",
"BrandInvertedColor" : "#FFFFFF",
"FeedbackPrimaryColor" : "#C23934",
"FeedbackSecondaryColor" : "#13C4A3",
"PrimaryBrandColor" : "#803ABE",
"SecondaryBrandColor" : "#2A7AB0",
"ContrastPrimaryColor" : "#000000",
"ContrastSecondaryColor": "#444444",
"ContrastTertiaryColor" : "#9FAAB5",
"ContrastQuaternaryColor" : "#E6E6EB",
"ContrastQuinaryColor" : "#EEEEEE",
"ContrastInvertedColor" : "#FFFFFF",
"IsSendLocationHistory" : false,
"GeoLocationMinUpdateFreqMins" : 10,
"GeoLocationAccuracy" : "Medium",
"RecordDataCacheTimeMins" : 240,
"MetadataCacheTimeDays" : 7,
"UpdateScheduleTimeMins" : 30,
"IsShowEditFullRecord" : false,
"TimeIntervalSetupMins" : "15",
"DefaultListViewDeveloperName" : null,
"NavbarInvertedColor" : "#FFFFFF",
"FeedbackSelectedColor" : "#FFFFFF",
"FutureDaysInDatePicker": 45,
"PastDaysInDatePicker": 45,
"IsDefault" : true,
"BgGeoLocationMinUpdateFreqMins" : 60,
"BgGeoLocationAccuracy" : "Coarse",
"IsUseSalesforceMobileActions" : false,
"IsAssignmentNotification" : false,
"IsDispatchNotification" : true
```

Service Report Template

Returns information corresponding to one or more service report templates in field service. This resource is available in REST API version 40.0 and later.

This resource allows users to input one or more service report template IDs, and responds with information about the templates. Service reports can be generated for work orders, work order line items, and service appointments.

ServiceReportTemplate is available to API users in orgs where Field Service is enabled. It is also enabled for Experience Builder sites.

URI

/services/data/vXX.X/support/fieldservice/ServiceReportTemplate

Formats

JSON

HTTP Method

GET

Authentication

Authorization: Bearer token

Parameters

Parameter	Description
templateIds	The list of service report template IDs, provided as comma-separated string values. The API response shows a failure if any template ID is invalid.
showDefault	A boolean parameter indicating whether the default service report template is returned in the response. If true, the default template is included; if false (default), the default template is not included. For example, if a request lists the IDs of two non-default templates and showDefault=true, the response will include information for three templates.
templateTypes	The type of record that the report template can be used for: ServiceAppointment, WorkOrder, or WorkOrderLineItem. Service report templates include four customizable sub-templates: WO—Work Order WOLI—Work Order Line Item WO_SA—Service Appointment for Work Order WOLI SA—Service Appointment for Work Order Line Item

Response Body

A service report has three main areas which cannot be deleted: **Header**, **Body** and **Footer**. Each area must contain at least one component—a **section**, **related list**, or **signature**—though the component can be empty. The Header and Footer come with a predefined section, and additional components cannot be added to them. The Body can contain one or more of each component.

Section components have the following properties:

- title: String
- hideTitle: Boolean
- hideFieldLabels: Boolean
- columns: Enum {1, 2}
- rightAlignment: Enum {true,false}
- fields: Array of {Field}

A **field** can be added to a section, related list, or signature. Columns in related lists are transformed into fields in the API. Field components have the following properties:

- fieldType: Enum {rta, entityField, blank}
- Attributes:
 - If the field type is rta, the field also contains {"richTextValue": "<html value>"}
 - If the field type is entityField, the field also contains {"entityName": "<WorkOrder>", "fieldName": "Account"}
 - If the field type is blank, no other information is required
- Position:
 - row
 - column

Related list components have the following properties:

- title: String
- hideTitle: Boolean
- entityName: String
- relatedListName: String
- relatedEntityName: String
- fields: Array of {Field Name (String), Column Position (Integer)}

Signature components have the following properties:

- title: String
- hideTitle: Boolean
- hideFieldLabels: Boolean
- columns: Enum {1, 2}
- rightAlignment: Enum {true,false}
- signatureType: Dynamic Enum {<technician 1>, <dispatcher 1>}
- fields: Array of {Field Name (String), Position (Row,Column)}
- **Example**: This example request uses two service report template IDs.

Request

GET

 $/services/data/v42.0/support/fieldservice/ServiceReportTemplate?templateIds=0SLxx00000000ABC,\\0SLR00000001QtOAI&showDefault=false&templateTypes=ServiceAppointment$

Response

```
"serviceReportTemplates": [
    "defaultTemplate": false,
    "error": {
        "errorCode": "INVALID_TEMPLATE_ID",
        "errorMessage": "The Service Report Template ID is invalid."
    },
    "subTemplates": [],
    "templateId": "OSLxx0000000ABC"
```

```
},
      "defaultTemplate": false,
      "error": null,
      "subTemplates": [
          "regions": [
               "sections": [
                   "columns": 2,
                   "hideFieldLabels": false,
                   "hideTitle": false,
                   "items": [
                       "position": {
                         "column": 0,
                         "row": 0
                       },
                       "richText": "<img alt=\"User-added image\"
src=\"https://mobile1.file.force.com/servlet/rtaImage?eid=0QFR000000086Zsamp;feoid=Data&refid=OFR0000000DGK\">/img>",
                       "type": "rta"
                     },
                       "position": {
                         "column": 1,
                        "row": 0
                       "richText": "<u><i>Salesforce.com</i></u>",
                       "type": "rta"
                     }
                   ],
                   "position": 0,
                   "rightAlign": false,
                   "title": "Service Report",
                   "type": "section"
                }
              ],
               "type": "HEADER"
            },
            {
               "sections": [
                {
                   "columns": 2,
                   "hideFieldLabels": false,
                   "hideTitle": true,
                   "items": [],
                   "position": 0,
                   "rightAlign": false,
                   "showPageNumber": false,
                   "title": "Footer Section",
                   "type": "section"
                 }
```

```
"type": "FOOTER"
},
{
  "sections": [
   {
      "columns": 2,
     "hideFieldLabels": false,
      "hideTitle": false,
      "items": [
       {
          "entityName": "ServiceAppointment",
          "label": "Account",
          "name": "AccountId",
          "position": {
           "column": 0,
           "row": 0
         },
          "type": "entityField"
        },
        . . .
          "position": {
           "column": 1,
           "row": 0
          "richText": "Prepared By:",
          "type": "rta"
       }
     ],
      "position": 0,
      "rightAlign": false,
      "title": "Account & Contact Information",
      "type": "section"
    },
      "entityName": "WorkOrder",
      "filterCriteria": {
        "conditions": [
            "field": "Status",
            "operation": "includes",
            "position": 0,
            "values": [
              "In Progress",
              "Completed"
            ]
       ]
      "hideTitle": false,
      "items": [
          "column": 0,
```

```
"label": "Work Order Line Item Number",
     "name": "LineItemNumber"
   },
     "column": 6,
     "label": "Unit Price",
     "name": "UnitPrice"
   }
 ],
 "position": 5,
 "relatedEntityName": "WorkOrderLineItem",
 "relatedListName": "WorkOrderLineItems",
 "title": "Work Order Line Items",
 "type": "relatedList"
},
 "columns": 1,
 "hideFieldLabels": false,
  "hideTitle": false,
 "items": [
      "entityName": "DigitalSignature",
      "label": "Signature",
      "name": "Document",
      "position": {
       "column": 0,
       "row": 0
      "type": "entityField"
      "entityName": "DigitalSignature",
      "label": "Signed By",
      "name": "SignedBy",
      "position": {
       "column": 0,
       "row": 1
      "type": "entityField"
    },
      "entityName": "DigitalSignature",
      "label": "Date",
      "name": "SignedDate",
      "position": {
       "column": 0,
       "row": 2
     },
      "type": "entityField"
 ],
 "position": 9,
 "rightAlign": false,
```

sObject Suggested Articles

Returns a list of suggested Salesforce Knowledge articles for a case, work order, or work order line item.

Syntax

URI

To return suggested articles for a case, work order, or work order line item that is being created, use

/services/data/v**XX.X**/sobjects/**sObject**/suggestedArticles

?language=articleLanguage&subject=subject&description=description. The sobject can be Case, WorkOrder, or WorkOrderLineItem. Suggestions are based on common keywords in the title, description, and other information that's entered before the record has been saved and assigned an ID.

For example:

/services/data/v**XX.X**/sobjects/**Case**/suggestedArticles?language-articleIanguage&subject=subject&description-description

or

 $v\textbf{\textit{XX.X}}/s objects/\textbf{\textit{WorkOrder}}/s uggested \textbf{Articles?language=} \textbf{\textit{articleLanguage}} \textbf{\textit{\&subject}} \textbf{\textit{\&blinetion=}} \textbf{\textit{description=}} \textbf{\textit{description=}}$

To return suggested articles for an existing record with an ID, use

 $/ services/data/v \textit{\textbf{XX}}. \textit{\textbf{X}}/ sobjects/\textit{\textbf{sObject}}/\textit{\textbf{ID}}/ suggested \texttt{Articles?language} = \textit{\textbf{articleLanguage}}$

Available since release

30.0

Formats

JSON, XML

HTTP methods

GET

Authentication

Authorization: Bearer token

Request body

None required

Request parameters

Parameter	Description
articleTypes	Optional. Three-character ID prefixes indicating the desired article types. You can specify multiple values for this parameter in a single REST call, by repeating the parameter name for each value. For example, articleTypes=ka0&articleTypes=ka1.
categories	Optional. The name of the data category group and the data category API name (not category title) for desired articles. The syntax is categories={"Group":"Category"}. Characters in the URL might need to be encoded. For example:
	categories=%7B%22Regions%22%3A%22Asia%22%2C%22 Products%22%3A%22Laptops%22%7D
	The same data category group can't be specified more than once. However, you can specify multiple data category group and data category pairs. For example, categories={"Regions":"Asia", "Products":"Laptops"}.
description	Text of the description. Valid only for new records without an existing ID and required if subject is null. Article suggestions are based on common keywords in the subject, description, or both.
language	Required. Language that the article is written in.
limit	Optional. Specifies the maximum number of suggested articles to return.
publishStatus	Optional. The article's publication status. Valid values: • Draft-Not published • Online-Published in Salesforce Knowledge
	• Archived
subject	Text of the subject. Valid only for new records without an existing ID and required if description is null. Article suggestions are based on common keywords in the subject, description, or both.
topics	Optional. The topic of returned articles. For example: topics=outlook&topics=email.
validationStatus	Optional. The validation status of returned articles.

Example for getting suggested articles for a case that's being created

curl

 $\label{local_map_map} \mbox{https://} \mbox{\it MyDomainName}. \\ \mbox{\it my.salesforce.com/services/data/v55.0/sobjects/Case/suggestedArticles?} \\ \mbox{\it language=en_US\&subject=orange+banana\&articleTypes=ka0\&articleTypes=ka1}$

-H "Authorization: Bearer token"

Example JSON response body

```
[ {
   "attributes" : {
      "type" : "KnowledgeArticleVersion",
      "url" : "/services/data/v55.0/sobjects/KnowledgeArticleVersion/ka0D00000004CcQ"
   "Id" : "ka0D00000004CcQ"
}, {
   "attributes" : {
      "type" : "KnowledgeArticleVersion",
      "url" : "/services/data/v55.0/sobjects/KnowledgeArticleVersion/ka0D00000004CXo"
      },
      "Id" : "ka0D000000004CXo"
} ]
```

Usage

Salesforce Knowledge must be enabled in your organization. The user must have the "View Articles" permission enabled. The articles suggested include only the articles the user can access, based on the data categories and article types the user has permissions to view.

Articles are suggested based on a relevance algorithm. The suggestedArticles resource is designed to get the IDs of articles relevant to a case, work order, or work order line item. It's intended to be used with other services that then use the IDs to get article data for display.

Appointment Bundling

Use the Appointment Bundling REST APIs to create bundles, start the automated process for creating bundles, unbundle one or more bundles, and update a bundle.

Limitations

Create Bundle, Unbundle, Unbundle Multiple, Update Bundle

- 1000 API calls within 24 hours.
- 50 API calls per engineer license within 24 hours (in addition to the 1000 API calls).
- 10 concurrent API calls.

Start Batch

• One API call per hour, per territory.

IN THIS SECTION:

Create Bundle

Creates a bundle of service appointments manually. This resource accepts service appointment IDs and a manual bundling policy ID. The manual bundling policy specifies the bundling rules and has to be marked for manual bundling. This resource returns the ID of the bundle service appointment. This endpoint is available in version 54.0 and later of the Salesforce API.

Start Batch

Creates service appointment bundles automatically. The resource uses appointment bundle policies that are marked for automatic bundling. Service appointments that are already bundled manually stay untouched by this API. The resource returns the success or failure message of starting the batch process of automatic bundling. This endpoint is available in version 54.0 and later of the Salesforce API.

Unbundle

Unbundle a bundle of service appointments. This resource accepts a bundle ID. This endpoint is available in version 54.0 and later of the Salesforce API.

Unbundle Multiple

Unbundle one or more bundles of service appointments. This resource accepts one or more bundle IDs. This endpoint is available in version 54.0 and later of the Salesforce API.

Update Bundle

Updates the service appointments of an existing bundle by adding or removing the service appointments from the bundle. This resource accepts a bundle ID and service appointment IDs. When you send a request, you can only perform one action, add or remove, on the service appointments. If you need to add and remove service appointments, do those in two separate requests. This endpoint is available in version 54.0 and later of the Salesforce API. URI

Create Bundle

Creates a bundle of service appointments manually. This resource accepts service appointment IDs and a manual bundling policy ID. The manual bundling policy specifies the bundling rules and has to be marked for manual bundling. This resource returns the ID of the bundle service appointment. This endpoint is available in version 54.0 and later of the Salesforce API.

URI

```
host/bundleflow/api/v1.0/bundle
```

How to get the host:

String host = BundleLogic.getBundlerFalconEnvironment();

Format

JSON

HTTP Method

POST

Authentication

```
Authorization: Bearer token
```

Headers

```
{\tt sf\_api\_version} {\small --} {\tt Sales force API version. Minimum version is 53.0.}
```

Authorization—Authorization token.

Content-Type—File format. Valid value is JSON.

Referer—Org domain URL.

Request Body

Properties

Field	Туре	Description
user	String	Optional. User name of user sending the request.
initiate	String	Type of bundle request. Valid value: manual
bundlePolicyld	String	ID of the related bundle policy containing the bundling rules.

Field		Туре	Description
saReque	estPayloads	Array	Details of service appointments that are bundled.
	serviceAppointmentId	String	ID of service appointments to be bundled.
	action	String	Bundling action performed on this service appointment. Valid value: add

Example: JSON Example

This example shows a manual bundle request of two service appointments.

Response Body

Properties

Field		Туре	Description
bundlel	d	String	ID of the new bundle. If the bundle isn't created, this field is null.
respons	sePayloads	Array	Details of the bundled objects.
	objectName	String	Type of object. Output: ServiceAppointment
	objectId	String	ID of the service appointment.
	action	String	Action performed on the object.
	status	String	Specifies if this object is bundled correctly. Output: SUCCESS or FAIL
	messageCode	Number	Success or error code of bundling the service appointment. 0 means success. The error codes are listed in Error Responses on page 422.

Field		Туре	Description
	message	String	Success or error message of bundling the object.
status		String	Status of the request. Output: SUCCESS or FAIL
messag	neCode	Number	Success or error code of the request. 0 means success. The error codes are listed in Error Responses on page 422.
messag	e	String	Success or error message of the request.

Example: JSON Example: Successful Response

This example shows the output of two service appointments bundled successfully.

```
"bundleId": "08px000000NzdH8AAJ",
"responsePayloads": [
    "objectName": "ServiceAppointment",
    "objectId": "08px000000NzbmsAAB",
    "action": "add",
    "status": "SUCCESS",
    "messageCode": 0,
    "message": "Success",
    "messageParams": [
    ]
 },
    "objectName": "ServiceAppointment",
    "objectId": "08pT30000006LLIAY",
    "action": "add",
    "status": "SUCCESS",
    "messageCode": 0,
    "message": "Success",
    "messageParams": [
  }
],
"status": "SUCCESS",
"messageCode": 0,
"message": "Success"
```

Example: JSON Example: Fail Response

This example shows the output of a request that's trying to bundle a service appointment that's already a bundle service appointment. A service appointment can't be part of two bundles, so the response status is FAIL.

```
{
  "bundleId":null,
```

Table 1: Error Responses

Code	Name	Message
0	NONE	<service appointment="" id#="">: Success.</service>
1	UNSUPPORTED_VERSION	Ask your admin to check the API version, then try again.
2	SA_PAYLOAD_SHOULD_CONTAIN_ADD_ACTIONS_ONLY	Create bundles using add actions only.
3	EMPTY_BUNDLE_POLICY	Enter an ID for the bundlePolicyId.
4	EMPTY_BUNDLE_INITIATE	Specify manual or auto for the initiate entry.
5	EMPTY_BUNDLE_SERVICE_APPOINTMENT	Add a bundle service appointment.
6	SA_PAYLOAD_DUPLICATED_SAS	Remove duplicate service appointment IDs.
7	SA_IS_BUNDLE	<service appointment="" id#="">: Is already a bundle service appointment.</service>
8	SA_ALREADY_BUNDLED	<service appointment="" id#="">: Is a bundle member service appointment in another bundle.</service>
9	STATUS_FORBIDDEN	<service appointment="" id#="">: Can't be bundled in the current status.</service>
10	SA_PAYLOAD_SHOULD_NOT_CONTAIN_MIX_ACTIONS	Send separate requests for add and remove actions.
11	SA_IS_NOT_BUNDLE	Select a bundle service appointment and try again.

Code	Name	Message
12	EXCEEDED_BUNDLE_MEMBERS_LIMIT	You reached the maximum number of service appointments for this bundle. Remove some of them and try again.
13	SA_PAYLOAD_SHOULD_CONTAIN_ONLY_BUNDLE_MEMBERS	To remove bundle members from a bundle, include only service appointments that are bundle members.
14	ERROR_IN_BASIC_VALIDATIONS	We couldn't bundle the service appointments.
15	ERROR_IN_LIMIT_VALIDATIONS	N/A
16	ERROR_IN_CRITERIA_VALIDATIONS	N/A
17	ERROR_IN_SERVICE_TERRITORY_VALIDATIONS	Confirm or revise the service territories of the selected service appointments. Or ask your admin for help.
18	ERROR_IN_RESTRICTION_VALIDATIONS	Confirm or revise the selected service appointments. Or ask your admin to check the restriction policies.
19	EXCEEDED_BUNDLE_DURATION_LIMIT	N/A
20	EMPTY_BODY	Fill in the request.
21	SA_IS_NOT_BUNDLED	<service appointment="" id#="">: Can't remove a service appointment that isn't in the bundle.</service>
22	ERROR_IN_AGGREGATION	Confirm or revise the selected service appointments. Or ask your admin to check the aggregation policies.
23	ERROR_IN_PROPAGATION	Confirm or revise the selected service appointments. Or ask your admin to check the propagation policies.
24	GET_POLICY_FAILURE	Ask your admin to check the bundle policies, then try again.
25	GET_CONFIG_FAILURE	Ask your admin to check the bundle config, then try again.
26	GET_BUNDLE_INFO_FAILURE	Try again later.
27	ERROR_IN_LOGIC	We couldn't bundle the service appointments.
28	EMPTY_BUNDLE_MEMBERS	Add bundle member service appointments.

Code	Name	Message
29	EMPTY_BUNDLE_PARENT_WORK_ORDER_ID	Add the work order ID for the bundle service appointment.
30	UNBUNDLE_REQUEST_ASSIGNED_RESOURCES_NOT_COMPATIBLE	To unbundle a scheduled bundle, send assigned resources for each service appointment.
31	EMPTY_OLD_VALUES	To update a bundle, send the current values.
32	EMPTY_NEW_VALUES	To update a bundle, send the new values.
33	SA_PAYLOAD_SHOULD_CONTAIN_AT_LEAST_ONE_ADD_OR_REMOVE_ACTION	To update a bundle, send at least one add or remove action.
34	FORBIDDEN_FIELDS_IN_POLICY_OBJECT	Confirm or revise the selected service appointments. Or ask your admin to check the field names selected in the related policies.
35	EMPTY_SERVICE_TERRITORY	Add a Service Territory ID.
36	EMPTY_START_TIME	Add the interval's start time.
37	EMPTY_END_TIME	Add the interval's end time.
38	ERROR_IN_BUNDLE_POLICY_RFC	Confirm or revise the selected service appointments. Or ask your admin to check the recordset filter criteria in the bundle policy.
39	ERROR_IN_TIME_ZONE_VALIDATION	Select service appointments that are in the same time zone. Or ask your admin for help.
40	ERROR_IN_LOGIC_UNBUNDLE	We couldn't unbundle the service appointment.
41	ERROR_CREATING_BUNDLE	We couldn't bundle the service appointments.
42	ERROR_ADDING_TO_BUNDLE	We couldn't add the service appointment to the bundle.
43	ERROR_REMOVING_FROM_BUNDLE	We couldn't remove the service appointment from the bundle.
44	ERROR_UNBUNDLING	We couldn't unbundle the service appointment.
-500	http error	Hmm Something went wrong. Try again.

Code Sample from Apex

```
public static Map<String, String> createSABundle() {
   String apiVersion = '54.0'; // Spring '22
   String bundleApi = '/bundleflow/api/v1.0/bundle';
   String host = BundleLogic.getBundlerFalconEnvironment();
   String ref = URL.getOrgDomainUrl().toExternalForm();
   String bundleService = host + bundleApi;
   // Create HTTP request
   HttpRequest request = new HttpRequest();
   request.setEndpoint(bundleService);
   request.setMethod('POST');
   request.setHeader('sf_api_version', apiVersion);
   request.setHeader('Content-Type', 'application/json');
   // NOTE: This user must have 'Field Service Integration' permissions.
   request.setHeader('Authorization', 'Bearer ' + UserInfo.getSessionId());
   request.setHeader('Referer', ref);
   request.setTimeout(120000);
   // Create the body
   Map<String, Object> body = new Map<String, Object>();
   body.put('initiate','manual');
   body.put('bundlePolicyId','7sT9A0000004DX6UAM'); // NOTE: Use a real bundle policy ID.
   Map<String, Object> saList = new Map<String, Object>();
   saList.put('serviceAppointmentId', '08p9A0000005LEGQA2'); // NOTE: Use a real Service
Appointment ID.
   saList.put('action', 'add');
   List<Object> objectsList = new List<Object>();
   objectsList.add(saList);
   body.put('saRequestPayloads', objectsList);
   String reqBody = JSON.serialize(body);
   System.debug(body);
   request.setBody(reqBody);
   HttpResponse response = new Http().send(request);
    // Parse the JSON response
    // Handle a redirect message
   while (response.getStatusCode() == 302) {
        request.setEndpoint(response.getHeader('Location'));
        response = new Http().send(request);
    }
   Map<String, String> returnValue = new Map<String, String>();
   returnValue.put('statusCode', String.valueOf(response.getStatusCode()));
   // Return value when we don't get a success response
```

```
if (response.getStatusCode() != 200) {
    returnValue.put('message', 'The status code returned was not expected: ' +
response.getStatusCode() + ' ' + response.getStatus());
    System.debug(returnValue.get('message'));
    return (returnValue);

// Return value when we do get a success response
} else {
    returnValue.put('message', response.getBody());
    System.debug(response.getBody());
    return (returnValue);
}

Map<String, String> response = createSABundle();
System.debug(response);
```

Start Batch

Creates service appointment bundles automatically. The resource uses appointment bundle policies that are marked for automatic bundling. Service appointments that are already bundled manually stay untouched by this API. The resource returns the success or failure message of starting the batch process of automatic bundling. This endpoint is available in version 54.0 and later of the Salesforce API.

URI

```
How to get the host:

String host = BundleLogic.getBundlerFalconEnvironment();

Format

JSON

HTTP Method

POST

Authentication

Authorization: Bearer token

Headers

sf_api_version—Salesforce API version. Minimum version is 53.0.

Authorization—Authorization token.

Content-Type—File format. Valid value is JSON.

Referer—Org domain URL.
```

host/bundleflow/api/v1.0/startbatch

Request Body

Properties

Field	Туре	Description
operation	String	The bundling operation.
		Valid value: start-batch-processing

Example: JSON Example

This example shows an automated bundling request of service appointments.

```
{
    "operation": "start-batch-processing"
}
```

Response Body

Properties

Field	Туре	Description
httpStatus	Number	Response HTTP status.
statusDescription	String	Response status description.
responsePayload	String	Message about the batch status. If it's successful, the payload is null. If the batch bundling fails, the payload shows an error message, such as, "Wrong API version" or "Failed to start batch agent".
messageCode	Number	Message code is always 0.

Example: JSON Example: Successful Response

This example shows the output of a batch process of automatic bundling that started successfully.

```
"httpStatus":200,
   "statusDescription":null,
   "responsePayload":null,
   "messageCode":0
}
```

S Exαmple: JSON Example: Fail Response

This example shows the output of a batch process that failed to start because the operation parameter of the request is null or empty.

```
"httpStatus":400,
"statusDescription":null,
"responsePayload":"Failed to start batch agent",
```

```
"messageCode":0
}
```

Unbundle

Unbundle a bundle of service appointments. This resource accepts a bundle ID. This endpoint is available in version 54.0 and later of the Salesforce API.

URI

```
host/bundleflow/api/v1.0/bundle/<ID>
How to get the host:
String host = BundleLogic.getBundlerFalconEnvironment();
```

Format

JSON

HTTP Method

DELETE

Authentication

```
Authorization: Bearer token
```

Headers

```
sf_api_version—Salesforce API version. Minimum version is 53.0.
Authorization—Authorization token.
Content-Type—File format. Valid value is JSON.
Referer—Org domain URL.
```

Parameters

Parameter	Description
ID	Unique ID of the bundle.

Response Body

Properties

Field		Туре	Description
bundleld		String	ID of the new bundle. If the unbundling fails, it's null.
responsePayloads		Array	Response details of unbundling the service appointments. If it's successful, the payload is null. If the unbundling fails, the payload shows error details.
	status	String	Status of unbundling the service appointments. Output: FAIL
	messageCode	Number	Error code. The error codes are listed in Error Responses on page 429.

Field		Туре	Description	
	message	String	Error message.	
status		String	Status of the request. Output: SUCCESS or FAIL	
messageCode		Number	Success or error code of the request. 0 means success. The error codes are listed in Error Responses on page 429.	
message		String	Success or error message of the request.	

Example: JSON Example: Successful Response

This example shows the output of service appointments that are unbundled successfully.

```
"bundleId":"08px000000NzdMXAAZ",
    "responsePayloads":null,
    "status":"SUCCESS",
    "messageCode":0,
    "message":"Success"
}
```

Example: JSON Example: Fail Response

This example shows the output of a request where the user entered a service appointment ID instead of a bundle ID. The request only works with bundle IDs, so the response status is FAIL.

Table 2: Error Responses

Code	Name	Message
0	NONE	<service appointment="" id#="">: Success.</service>

Code	Name	Message
1	UNSUPPORTED_VERSION	Ask your admin to check the API version, then try again.
2	SA_PAYLOAD_SHOULD_CONTAIN_ADD_ACTIONS_ONLY	Create bundles using add actions only.
3	EMPTY_BUNDLE_POLICY	Enter an ID for the bundlePolicyld.
4	EMPTY_BUNDLE_INITIATE	Specify manual or auto for the initiate entry.
5	EMPTY_BUNDLE_SERVICE_APPOINTMENT	Add a bundle service appointment.
6	SA_PAYLOAD_DUPLICATED_SAS	Remove duplicate service appointment IDs.
7	SA_IS_BUNDLE	<service appointment="" id#="">: Is already a bundle service appointment.</service>
8	SA_ALREADY_BUNDLED	<service appointment="" id#="">: Is a bundle member service appointment in another bundle.</service>
9	STATUS_FORBIDDEN	<pre><service appointment="" id#="">: Can't be bundled in the current status.</service></pre>
10	SA_PAYLOAD_SHOULD_NOT_CONTAIN_MIX_ACTIONS	Send separate requests for add and remove actions.
11	SA_IS_NOT_BUNDLE	Select a bundle service appointment and try again.
12	EXCEEDED_BUNDLE_MEMBERS_LIMIT	You reached the maximum number of service appointments for this bundle. Remove some of them and try again.
13	SA_PAYLOAD_SHOULD_CONTAIN_ONLY_BUNDLE_MEMBERS	To remove bundle members from a bundle, include only service appointments that are bundle members.
14	ERROR_IN_BASIC_VALIDATIONS	We couldn't bundle the service appointments.
15	ERROR_IN_LIMIT_VALIDATIONS	N/A
16	ERROR_IN_CRITERIA_VALIDATIONS	N/A
17	ERROR_IN_SERVICE_TERRITORY_VALIDATIONS	Confirm or revise the service territories of the selected service appointments. Or ask your admin for help.
18	ERROR_IN_RESTRICTION_VALIDATIONS	Confirm or revise the selected service appointments. Or ask your admin to check the restriction policies.
19	EXCEEDED_BUNDLE_DURATION_LIMIT	N/A

Code	Name	Message
20	EMPTY_BODY	Fill in the request.
21	SA_IS_NOT_BUNDLED	<service appointment="" id#="">: Can't remove a service appointment that isn't in the bundle.</service>
22	ERROR_IN_AGGREGATION	Confirm or revise the selected service appointments. Or ask your admin to check the aggregation policies.
23	ERROR_IN_PROPAGATION	Confirm or revise the selected service appointments. Or ask your admin to check the propagation policies.
24	GET_POLICY_FAILURE	Ask your admin to check the bundle policies, then try again.
25	GET_CONFIG_FAILURE	Ask your admin to check the bundle config, then try again.
26	GET_BUNDLE_INFO_FAILURE	Try again later.
27	ERROR_IN_LOGIC	We couldn't bundle the service appointments.
28	EMPTY_BUNDLE_MEMBERS	Add bundle member service appointments.
29	EMPTY_BUNDLE_PARENT_WORK_ORDER_ID	Add the work order ID for the bundle service appointment.
30	UNBUNDLE_REQUEST_ASSIGNED_RESOURCES_NOT_COMPATIBLE	To unbundle a scheduled bundle, send assigned resources for each service appointment.
31	EMPTY_OLD_VALUES	To update a bundle, send the current values.
32	EMPTY_NEW_VALUES	To update a bundle, send the new values.
33	SA_PAYLOAD_SHOULD_CONTAIN_AT_LEAST_ONE_ADD_OR_REMOVE_ACTION	To update a bundle, send at least one add or remove action.
34	FORBIDDEN_FIELDS_IN_POLICY_OBJECT	Confirm or revise the selected service appointments. Or ask your admin to check the field names selected in the related policies.
35	EMPTY_SERVICE_TERRITORY	Add a Service Territory ID.
36	EMPTY_START_TIME	Add the interval's start time.
37	EMPTY_END_TIME	Add the interval's end time.

Code	Name	Message
38	ERROR_IN_BUNDLE_POLICY_RFC	Confirm or revise the selected service appointments. Or ask your admin to check the recordset filter criteria in the bundle policy.
39	ERROR_IN_TIME_ZONE_VALIDATION	Select service appointments that are in the same time zone. Or ask your admin for help.
40	ERROR_IN_LOGIC_UNBUNDLE	We couldn't unbundle the service appointment.
41	ERROR_CREATING_BUNDLE	We couldn't bundle the service appointments.
42	ERROR_ADDING_TO_BUNDLE	We couldn't add the service appointment to the bundle.
43	ERROR_REMOVING_FROM_BUNDLE	We couldn't remove the service appointment from the bundle.
44	ERROR_UNBUNDLING	We couldn't unbundle the service appointment.
-500	http error	Hmm Something went wrong. Try again.

Unbundle Multiple

Unbundle one or more bundles of service appointments. This resource accepts one or more bundle IDs. This endpoint is available in version 54.0 and later of the Salesforce API.

URI

host/bundleflow/api/v1.0/unbundleMultiple

How to get the host:

String host = BundleLogic.getBundlerFalconEnvironment();

Format

JSON

HTTP Method

POST

Authentication

Authorization: Bearer token

Headers

sf api version—Salesforce API version. Minimum version is 53.0.

Authorization—Authorization token.

Content-Type—File format. Valid value is JSON.

Referer—Org domain URL.

Request Body

Properties

Field		Туре	Description	
user		String	Optional. User name of user sending the request.	
initiate		String	Type of bundle request. Valid value: manual	
saRequestPayloads		Array	IDs of bundle service appointment to unbundle.	
	serviceAppointmentId	String	ID of a bundle service appointment.	

Example: JSON Example

This example shows a request to unbundle two bundles.

```
"user": "Misha",
"initiate": "manual",
"saRequestPayloads":[
      "serviceAppointmentId":"08px00000NzdLFAAZ"
   },
      "serviceAppointmentId":"08px00000NzdH8AAJ"
]
```

Response Body

Properties

The response body is an array of objects with these fields. Each object contains response details for a bundle service appointment you requested to unbundle.

Field			Туре	Description
header	'S		Object	For future use.
body			Object	Details of unbundling the service appointment bundle.
	bundle	id	String	ID of the bundle that is unbundled. If the unbundling fails, it's null.
	respons	sePayloads	Array	Response details of unbundling the service appointments. If it's successful, the payload is null. If the unbundling fails, the payload shows error details.
		status	String	Failure status of unbundling the service appointments. Output: FAIL

Field		Туре	Description	
		messageCode	Number	Error code. The error codes are listed in Error Responses on page 435.
		message	String	Error message.
	status		String	Status of unbundling the service appointments. Output: SUCCESS or FAIL
	messag	geCode	Number	Success or error code of unbundling the bundle. 0 means success. The error codes are listed in Error Responses on page 435.
	messag	ge	String	Success or error message of unbundling the bundle.
statusC	Code		String	Success or error code of the request.
statusC	CodeValu	е	Number	Success or error code number of the request. 0 means success. The error codes are listed in Error Responses on page 435.

Example: JSON Example: Successful Response

This example shows a successful response ** of unbundling two service appointment bundles.

```
[
      "headers":{
      "body": {
         "bundleId": "08px000000NzdLFAAZ",
         "responsePayloads":null,
         "status": "SUCCESS",
         "messageCode":0,
         "message": "Success"
      "statusCode": "OK",
      "statusCodeValue":200
   },
      "headers":{
      "body": {
         "bundleId": "08px000000NzdH8AAJ",
         "responsePayloads":null,
         "status": "SUCCESS",
         "messageCode":0,
         "message": "Success"
      "statusCode":"OK",
      "statusCodeValue":200
]
```



Example: JSON Example: Fail Response

This example shows the output of a request where the user entered a service appointment ID instead of a bundle ID. The request only works with bundle IDs, so the response status is FAIL.

```
[
      "headers":{
      },
      "body": {
         "bundleId":null,
         "responsePayloads":[
               "status":"FAIL",
               "messageCode":11,
               "message": "Replace the service appointment with a bundle service
appointment.",
               "messageParams":[
               ]
            }
         ],
         "status":"FAIL",
         "messageCode":44,
         "message":"We couldn't unbundle the service appointment."
      "statusCode": "MULTI STATUS",
      "statusCodeValue":207
]
```

Table 3: Error Responses

Code	Name	Message
0	NONE	<service appointment="" id#="">: Success.</service>
1	UNSUPPORTED_VERSION	Ask your admin to check the API version, then try again.
2	SA_PAYLOAD_SHOULD_CONTAIN_ADD_ACTIONS_ONLY	Create bundles using add actions only.
3	EMPTY_BUNDLE_POLICY	Enter an ID for the bundlePolicyId.
4	EMPTY_BUNDLE_INITIATE	Specify manual or auto for the initiate entry.
5	EMPTY_BUNDLE_SERVICE_APPOINTMENT	Add a bundle service appointment.
6	SA_PAYLOAD_DUPLICATED_SAS	Remove duplicate service appointment IDs.
7	SA_IS_BUNDLE	<service appointment="" id#="">: Is already a bundle service appointment.</service>

Code	Name	Message
8	SA_ALREADY_BUNDLED	<service appointment="" id#="">: Is a bundle member service appointment in another bundle.</service>
9	STATUS_FORBIDDEN	<service appointment="" id#="">: Can't be bundled in the current status.</service>
10	SA_PAYLOAD_SHOULD_NOT_CONTAIN_MIX_ACTIONS	Send separate requests for add and remove actions.
11	SA_IS_NOT_BUNDLE	Select a bundle service appointment and try again.
12	EXCEEDED_BUNDLE_MEMBERS_LIMIT	You reached the maximum number of service appointments for this bundle. Remove some of them and try again.
13	SA_PAYLOAD_SHOULD_CONTAIN_ONLY_BUNDLE_MEMBERS	To remove bundle members from a bundle, include only service appointments that are bundle members.
14	ERROR_IN_BASIC_VALIDATIONS	We couldn't bundle the service appointments.
15	ERROR_IN_LIMIT_VALIDATIONS	N/A
16	ERROR_IN_CRITERIA_VALIDATIONS	N/A
17	ERROR_IN_SERVICE_TERRITORY_VALIDATIONS	Confirm or revise the service territories of the selected service appointments. Or ask your admin for help.
18	ERROR_IN_RESTRICTION_VALIDATIONS	Confirm or revise the selected service appointments. Or ask your admin to check the restriction policies.
19	EXCEEDED_BUNDLE_DURATION_LIMIT	N/A
20	EMPTY_BODY	Fill in the request.
21	SA_IS_NOT_BUNDLED	<service appointment="" id#="">: Can't remove a service appointment that isn't in the bundle.</service>
22	ERROR_IN_AGGREGATION	Confirm or revise the selected service appointments. Or ask your admin to check the aggregation policies.
23	ERROR_IN_PROPAGATION	Confirm or revise the selected service appointments. Or ask your admin to check the propagation policies.
24	GET_POLICY_FAILURE	Ask your admin to check the bundle policies, then try again.

		Message
25	GET_CONFIG_FAILURE	Ask your admin to check the bundle config, then try again.
26	GET_BUNDLE_INFO_FAILURE	Try again later.
27	ERROR_IN_LOGIC	We couldn't bundle the service appointments.
28	EMPTY_BUNDLE_MEMBERS	Add bundle member service appointments.
29	EMPTY_BUNDLE_PARENT_WORK_ORDER_ID	Add the work order ID for the bundle service appointment.
30	UNBUNDLE_REQUEST_ASSIGNED_RESOURCES_NOT_COMPATIBLE	To unbundle a scheduled bundle, send assigned resources for each service appointment.
31	EMPTY_OLD_VALUES	To update a bundle, send the current values.
32	EMPTY_NEW_VALUES	To update a bundle, send the new values.
33	SA_PAYLOAD_SHOULD_CONTAIN_AT_LEAST_ONE_ADD_OR_REMOVE_ACTION	To update a bundle, send at least one add or remove action.
34	FORBIDDEN_FIELDS_IN_POLICY_OBJECT	Confirm or revise the selected service appointments. Or ask your admin to check the field names selected in the related policies.
35	EMPTY_SERVICE_TERRITORY	Add a Service Territory ID.
36	EMPTY_START_TIME	Add the interval's start time.
37	EMPTY_END_TIME	Add the interval's end time.
38	ERROR_IN_BUNDLE_POLICY_RFC	Confirm or revise the selected service appointments. Or ask your admin to check the recordset filter criteria in the bundle policy.
39	ERROR_IN_TIME_ZONE_VALIDATION	Select service appointments that are in the same time zone. Or ask your admin for help.
40	ERROR_IN_LOGIC_UNBUNDLE	We couldn't unbundle the service appointment.
41	ERROR_CREATING_BUNDLE	We couldn't bundle the service appointments.
42	ERROR_ADDING_TO_BUNDLE	We couldn't add the service appointment to the bundle.

Code	Name	Message
43	ERROR_REMOVING_FROM_BUNDLE	We couldn't remove the service appointment from the bundle.
44	ERROR_UNBUNDLING	We couldn't unbundle the service appointment.
-500	http error	Hmm Something went wrong. Try again.

Update Bundle

Updates the service appointments of an existing bundle by adding or removing the service appointments from the bundle. This resource accepts a bundle ID and service appointment IDs. When you send a request, you can only perform one action, add or remove, on the service appointments. If you need to add and remove service appointments, do those in two separate requests. This endpoint is available in version 54.0 and later of the Salesforce API. URI

URI

host/bundleflow/api/v1.0/bundle/{ID}

How to get the host:

String host = BundleLogic.getBundlerFalconEnvironment();

Format

JSON

HTTP Method

PATCH

Authentication

Authorization: Bearer token

Headers

sf api version—Salesforce API version. Minimum version is 53.0.

Authorization—Authorization token.

Content-Type—File format. Valid value is JSON.

 ${\tt Referer-Org\ domain\ URL}.$

Parameters

Parameter	Description	
ID	Unique ID of the bundle.	

Request Body

Properties

Field	Туре	Description
user	String	Optional. User name of user sending the request.

Field		Туре	Description	
initiate		String	Type of bundle request. Valid value: manual	
saReque	est Payloads	Array	Details of the service appointments to be updated for this bundle.	
serviceAppointmentId String		String	ID of a service appointment.	
	action	String	Bundling action performed on this service appointment. All the service appointments in the request must have the same value. Valid values: add or remove	

Example: JSON Example

This example shows a manual request to add two service appointments to a bundle.

Response Body

Properties

Field		Туре	Description
bundlel	d	String	ID of the bundle to update. If the update isn't successful, it's null.
respons	ePayloads	Array	Details of the service appointment objects that are part of the bundle request.
	objectName	String	Type of object. Output: ServiceAppointment
	objectId	String	ID of the service appointment.
	action	String	Bundling action performed on this service appointment. Valid values: add or remove

Field	Field Type		Description	
	status	String	Status of updating the service appointment. Output: SUCCESS or FAIL	
	messageCode	Number	Success or error code of updating the service appointment. 0 means success. The error codes are listed in Error Responses on page 441.	
	message	String	Success or error message of updating the service appointment.	
status		String	Status of the request. Output: SUCCESS or FAIL	
messag	neCode	Number	Success or error code of the request. 0 means success. The error codes are listed in Error Responses on page 441.	
messag	e	String	Success or error message of the request.	

Example: JSON Example: Successful Response

This example shows a successful response of adding a service appointment to a bundle.

```
"bundleId": "08px000000NzdJOAAZ",
"responsePayloads":[
      "objectName": "ServiceAppointment",
      "objectId": "08px000000NzbmiAAB",
      "action": "add",
      "status": "SUCCESS",
      "messageCode":0,
      "message": "Success",
      "messageParams":[
      ]
"status": "SUCCESS",
"messageCode":0,
"message":"Success"
```

Example: JSON Example: Fail Response

This example shows the output of a request where the user tried to add and remove service appointments to a bundle in the same request. The request only works if all service appointments are either added or removed from a bundle, so the response status is FAIL.

```
"bundleId":null,
"responsePayloads":[
```

```
"status":"FAIL",
    "messageCode":10,
    "message":"Send separate requests for add and remove actions.",
    "messageParams":[

    ]
}

// "status":"FAIL",
    "messageCode":14,
    "message":"We couldn't bundle the service appointments."
}
```

Table 4: Error Responses

Code	Name	Message
0	NONE	<service appointment="" id#="">: Success.</service>
1	UNSUPPORTED_VERSION	Ask your admin to check the API version, then try again.
2	SA_PAYLOAD_SHOULD_CONTAIN_ADD_ACTIONS_ONLY	Create bundles using add actions only.
3	EMPTY_BUNDLE_POLICY	Enter an ID for the bundlePolicyld.
4	EMPTY_BUNDLE_INITIATE	Specify manual or auto for the initiate entry.
5	EMPTY_BUNDLE_SERVICE_APPOINTMENT	Add a bundle service appointment.
6	SA_PAYLOAD_DUPLICATED_SAS	Remove duplicate service appointment IDs.
7	SA_IS_BUNDLE	<service appointment="" id#="">: Is already a bundle service appointment.</service>
8	SA_ALREADY_BUNDLED	<service appointment="" id#="">: Is a bundle member service appointment in another bundle.</service>
9	STATUS_FORBIDDEN	<service appointment="" id#="">: Can't be bundled in the current status.</service>
10	SA_PAYLOAD_SHOULD_NOT_CONTAIN_MIX_ACTIONS	Send separate requests for add and remove actions.
11	SA_IS_NOT_BUNDLE	Select a bundle service appointment and try again.
12	EXCEEDED_BUNDLE_MEMBERS_LIMIT	You reached the maximum number of service appointments for this bundle. Remove some of them and try again.

Code	Name	Message
13	SA_PAYLOAD_SHOULD_CONTAIN_ONLY_BUNDLE_MEMBERS	To remove bundle members from a bundle, include only service appointments that are bundle members.
14	ERROR_IN_BASIC_VALIDATIONS	We couldn't bundle the service appointments.
15	ERROR_IN_LIMIT_VALIDATIONS	N/A
16	ERROR_IN_CRITERIA_VALIDATIONS	N/A
17	ERROR_IN_SERVICE_TERRITORY_VALIDATIONS	Confirm or revise the service territories of the selected service appointments. Or ask your admin for help.
18	ERROR_IN_RESTRICTION_VALIDATIONS	Confirm or revise the selected service appointments. Or ask your admin to check the restriction policies.
19	EXCEEDED_BUNDLE_DURATION_LIMIT	N/A
20	EMPTY_BODY	Fill in the request.
21	SA_IS_NOT_BUNDLED	<service appointment="" id#="">: Can't remove a service appointment that isn't in the bundle.</service>
22	ERROR_IN_AGGREGATION	Confirm or revise the selected service appointments. Or ask your admin to check the aggregation policies.
23	ERROR_IN_PROPAGATION	Confirm or revise the selected service appointments. Or ask your admin to check the propagation policies.
24	GET_POLICY_FAILURE	Ask your admin to check the bundle policies, then try again.
25	GET_CONFIG_FAILURE	Ask your admin to check the bundle config, then try again.
26	GET_BUNDLE_INFO_FAILURE	Try again later.
27	ERROR_IN_LOGIC	We couldn't bundle the service appointments.
28	EMPTY_BUNDLE_MEMBERS	Add bundle member service appointments.
29	EMPTY_BUNDLE_PARENT_WORK_ORDER_ID	Add the work order ID for the bundle service appointment.

Code	Name	Message
30	UNBUNDLE_REQUEST_ASSIGNED_RESOURCES_NOT_COMPATIBLE	To unbundle a scheduled bundle, send assigned resources for each service appointment.
31	EMPTY_OLD_VALUES	To update a bundle, send the current values.
32	EMPTY_NEW_VALUES	To update a bundle, send the new values.
33	SA_PAYLOAD_SHOULD_CONTAIN_AT_LEAST_ONE_ADD_OR_REMOVE_ACTION	To update a bundle, send at least one add or remove action.
34	FORBIDDEN_FIELDS_IN_POLICY_OBJECT	Confirm or revise the selected service appointments. Or ask your admin to check the field names selected in the related policies.
35	EMPTY_SERVICE_TERRITORY	Add a Service Territory ID.
36	EMPTY_START_TIME	Add the interval's start time.
37	EMPTY_END_TIME	Add the interval's end time.
38	ERROR_IN_BUNDLE_POLICY_RFC	Confirm or revise the selected service appointments. Or ask your admin to check the recordset filter criteria in the bundle policy.
39	ERROR_IN_TIME_ZONE_VALIDATION	Select service appointments that are in the same time zone. Or ask your admin for help.
40	ERROR_IN_LOGIC_UNBUNDLE	We couldn't unbundle the service appointment.
41	ERROR_CREATING_BUNDLE	We couldn't bundle the service appointments.
42	ERROR_ADDING_TO_BUNDLE	We couldn't add the service appointment to the bundle.
43	ERROR_REMOVING_FROM_BUNDLE	We couldn't remove the service appointment from the bundle.
44	ERROR_UNBUNDLING	We couldn't unbundle the service appointment.
-500	http error	Hmm Something went wrong. Try again.

Field Service Metadata API

The following Metadata types are used in Field Service.

IN THIS SECTION:

FieldServiceSettings

Represents an organization's Field Service settings.

Skill

Represents the settings for a skill used for field service or to route chats to agents in Chat, such as the name of the skill and which agents the skills are assigned to.

TimeSheetTemplate

Represents a template for creating time sheets in Field Service. This type extends the Metadata metadata type and inherits its fullName field.

FieldServiceSettings

Represents an organization's Field Service settings.

To learn more about Field Service settings, see Enable Field Service in Salesforce Help.

In the package manifest, all organization settings metadata types are accessed using the Settings name. See Settings for more details.

Version

FieldServiceSettings is available in API version 40.0 and later.

Field	Field Type	Description
apptAssistantExpiration	int	The expiration time of apptAssistantInfoUrl after which the customer stops seeing the mobile worker's location and estimated time of arrival. Available in API version 50.0 and later.
apptAssistantInfoUrl	string	The tracking URL that helps a customer see the mobile worker's estimated time of arrival and tracking information. Available in API version 50.0 and later.
apptAssistantRadiusUnitValue	ApptAssistantPadiusUnit (enumeration of type string)	The units for specifying the geofence radius. When the mobile worker enters this area, a Last Mile notification is automatically sent. Valid values are: Kilometer Meter

Field	Field Type	DescriptionMileYardAvailable in API version 50.0 and later.
apptAssistantRadiusValue	int	The geofence radius from the service appointment's address used for sending a notification to the customer when the mobile worker approaches the address. Available in API version 50.0 and later.
apptAssistantStatus	string	The status on the service appointment used to trigger En Route notification. The value has to match one of the service appointment's Status field options. When the mobile worker selects this status on a service appointment, the customer receives the En Route notification with tracking details. Available in API version 50.0 and later.
deepLinkPublicSecurityKey	string	Provides a public security key for users accessing a deep link action in the Field Service mobile app. Hide the redirection warning by configuring the deep link URL with a security key. The deep link URL then processes the security check. Available in API version 54.0 and later.
doesShareSaParentWoWithAr	boolean	Shares service appointments' parent work orders with their assigned resources. This setting applies only if doesShareSaWithAr is selected and sharing access for work orders is set to Private or Public Read Only. Technician assigned resources get Read-Write access to their work orders. For assigned resources of type Crew, the crew leader gets Read-Write access and crew members get Read access. If the service appointment's parent is a work order line item, assigned resources get access to the associated work order.
doesShareSaWithAr	boolean	Shares dispatched service appointments with their assigned resources. This setting applies only if sharing access for service appointments is set to Private or Public Read Only. Technician assigned resources get Read-Write access to their service

Field	Field Type	Description
		appointments. For assigned resources of type Crew, the crew leader gets Read-Write access and crew members get Read access.
enableWorkOrders	boolean	Enables Work Orders for the org.
		This setting allows users to use the Work Order object, whether or not Field Service is enabled. When Field Service is enabled, you can't turn off Work Orders.
enableWorkPlansAutoGeneration	boolean	Allows work plans and their work steps to be generated automatically when a work order or a work order line item is newly created. The specific work plans and work steps to be generated depends on matching criteria specified in Work Plan Selection Rules. Available in API version 52.0 and later.
fieldServiceNotificationsOrgPref	boolean	Turns on in-app notifications for the Salesforce mobile app and Lightning Experience users. Notifications are sent when any of the following actions occurs on a work order or work order line item that they own or follow:
		A text or file post is added
		A tracked field is updated
		The record owner changes
		• The resource assignments change on a related service appointment
		If the option to track all related objects is selected in the feed tracking settings for work orders, users are also notified when child records of work orders—such as service appointments—are created or deleted.
fieldServiceOrgPref	boolean	Indicates whether Field Service is enabled.
isGeoCodeSyncEnabled	boolean	Syncs the location of a Service Resource to an Inventory object.
isLocationHistoryEnabled	boolean	Tracks the location history of a Service Resource.
mobileFeedbackEmails	string	Stores an email address to which a feedback email is sent when users leave feedback from the Field Service mobile app. Available in API version 54.0 and later.

Field	Field Type	Description
o2EngineEnabled	boolean	Enables Field Service Enhanced Scheduling and Optimization. The default value is false. Available in API version 55.0 and later.
objectMappingItem	ObjectMappingItem on page 447	Represents an organization's custom field mapping for Work Plan or Work Step generation. Custom Fields can be mapped from WorkPlanTemplate to WorkPlan, WorkStepTemplate to WorkStep, or WorkPlanTemplateEntry to WorkStep. Available in API version 52.0 and later.
optimizationServiceAccess	boolean	Allows the optimization service to access data in your Salesforce org.
serviceAppointmentsDueDateOffsetOrgValue	int	Indicates the number of days past the Created Date that the Due Date on auto-created service appointments should fall. Work types include an option to automatically add a service appointment to new work orders or work order line items using the work type.
workOrderDurationSource	WorkOrdeDurationSource (enumeration of type string)	The source for the work order duration value. Possible values are: WorkType TotalFromWorkPlan Custom Available in API version 55.0 and later.
workOrderLineItemSearchFields	string	The work order line item fields that the search engine should scan to suggest knowledge articles on work order line items.
workOrderSearchFields	string	The work order fields that the search engine should scan to suggest knowledge articles on work orders.

ObjectMappingItem

Represents an organization's custom field mapping for Work Plan or Work Step generation. Custom Fields can be mapped from WorkPlanTemplate to WorkPlan, WorkStepTemplate to WorkStep, or WorkPlanTemplateEntry to WorkStep. Available in API version 52.0 and later.

Field Name	Field Type	Description
mappingType	string	The type of object mapping. Valid values are:
		 WorkPlans_WorkPlanTemplate_WorkPlan — Maps a WorkPlanTemplate to a WorkPlan
		 WorkPlans_WorkStepTemplate_WorkStep — Maps a WorkStepTemplate to a WorkStep
		 WorkPlans_WorkPlanTemplateEntry_WorkStep — Maps a WorkPlanTemplateEntry to a WorkStep
objectMapping	ObjectMapping on page 448	The object mapping details.

ObjectMapping

Represents a map of fields in the input object to fields in the output object.

Field Name	Field Type	Description
inputObject	string	Required. The name of the object type containing the source fields for mapping. Valid values are:
		 WorkPlanTemplate
		 WorkStepTemplate
		 WorkPlanTemplateEntry
mappingFields	[ObjectMappingField on page 448]	Required. The mapping of source object fields to target object fields.
outputObject	string	Required. The name of the object type that receives data from the source fields. Valid values are:
		• WorkPlan
		• WorkStep

ObjectMappingField

A field name in the input object and the corresponding field name in the output object.

inputField string Required. The name of a custom field supplying source data. This field is from the object specified in inputObject.	Field Name	Field Type	Description
	inputField	string	

Field Name	Field Type	Description
outputField	string	Required. The name of a custom field that receives data from the source field specified in inputField. This field is from the object specified in outputObject.

Declarative Metadata Sample Definition

This sample file shows a subset of the possible field service settings that you can customize.

```
<?xml version="1.0" encoding="UTF-8"?>
<FieldServiceSettings xmlns="http://soap.sforce.com/2006/04/metadata">
   <doesAllowEditSaForCrew>false</doesAllowEditSaForCrew>
   <doesShareSaParentWoWithAr>false</doesShareSaParentWoWithAr>
   <doesShareSaWithAr>false</doesShareSaWithAr>
   <enableWorkOrders>false/enableWorkOrders>
   <enableWorkPlansAutoGeneration>true</enableWorkPlansAutoGeneration>
   <fieldServiceNotificationsOrgPref>false</fieldServiceNotificationsOrgPref>
   <fieldServiceOrgPref>true</fieldServiceOrgPref>
   <isGeoCodeSyncEnabled>false</isGeoCodeSyncEnabled>
   <isLocationHistoryEnabled>false</isLocationHistoryEnabled>
   <o2EngineEnabled>false</o2EngineEnabled>
   <objectMappingItem>
     <mappingType>WorkPlans WorkPlanTemplate WorkPlan
      <objectMapping>
        <inputObject>WorkPlanTemplate</inputObject>
        <mappingFields>
            <inputField>WorkPlanTemplate CustomNumberField c</inputField>
            <outputField>WorkPlan CustomNumberField c</outputField>
        </mappingFields>
        <mappingFields>
            <inputField>WorkPlanTemplate CustomTextField c</inputField>
            <outputField>WorkPlan CustomPicklistField c</outputField>
        </mappingFields>
        <outputObject>WorkPlan
     </objectMapping>
   </objectMappingItem>
   <objectMappingItem>
      <mappingType>WorkPlans WorkStepTemplate WorkStep/mappingType>
     <objectMapping>
        <inputObject>WorkStepTemplate</inputObject>
        <mappingFields>
            <inputField>WokStepTemplate CustomNumberField c</inputField>
            <outputField>WokStep CustomNumberField c</outputField>
        </mappingFields>
        <mappingFields>
            <inputField>WokStepTemplate CustomTextField c</inputField>
            <outputField>WokStep CustomTextField c</outputField>
        </mappingFields>
        <outputObject>WorkStep</outputObject>
     </objectMapping>
   </objectMappingItem>
   <objectMappingItem>
```

Wildcard Support in the Manifest File

The wildcard character * (asterisk) in the package.xml manifest file doesn't apply to metadata types for feature settings. The wildcard applies only when retrieving all settings, not for an individual setting. For details, see Settings. For information about using the manifest file, see Deploying and Retrieving Metadata with the Zip File.

Skill

Represents the settings for a skill used for field service or to route chats to agents in Chat, such as the name of the skill and which agents the skills are assigned to.

This type extends the Metadata metadata type and inherits its fullName field.

File Suffix and Directory Location

Skill values are stored in the <developer name>.skill file in the skills directory.

Version

Skill is available in API version 28.0 and later.

Field Name	Field Type	Description
assignments	SkillAssignments	Specifies how skills are assigned to Chat users. Skills can be assigned to sets of users or sets of profiles.
description	string	Specifies the description of the skill. This field is available in API version 38.0 and later.
label	string	Specifies the name of the skill.

SkillAssignments

Represents which users and user profiles to whom specific skills are assigned.

Fields

Field Name	Field Type	Description
profiles	SkillProfileAssignments	Specifies the profiles that are associated with a specific skill.
users	SkillUserAssignments	Specifies the users that are associated with a specific skill.

SkillProfileAssignments

Represents the profiles that are associated with a specific skill.

Fields

Field Name	Field Type	Description
profile	string	Specifies the custom name of the profile associated with a specific skill.

SkillUserAssignments

Represents the users that are associated with a specific skill.

Fields

Field Name	Field Type	Description
user	string	Specifies the username of the user associated with a specific skill.

Declarative Metadata Sample Definition

This is a sample of a skill file.

```
</users>
  </assignments>
</Skill>
```

Wildcard Support in the Manifest File

This metadata type supports the wildcard character * (asterisk) in the package.xml manifest file. For information about using the manifest file, see Deploying and Retrieving Metadata with the Zip File.

TimeSheetTemplate

Represents a template for creating time sheets in Field Service. This type extends the Metadata metadata type and inherits its fullName field.



Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

File Suffix and Directory Location

TimeSheetTemplate components have the suffix timeSheetTemplate and are stored in the timeSheetTemplates folder.

Version

TimeSheetTemplate components are available in API version 46.0 and later.

Special Access Rules

Field Service must be enabled. Users must have the Customize Application and Time Sheet Template permissions.

Field Name	Field Type	Description
active	boolean	Required. Indicates whether the time sheet template is active ($true$) or not (false).
description	string	The time sheet template's description.
frequency	TimeSheetFrequency (enumeration of type string)	Required. Defines the frequency of the time sheet creation period. One of the following values: Daily Weekly EveryTwoWeeks TwiceAMonth Monthly
masterLabel	string	Required. The name of the time sheet template.

Field Name	Field Type	Description
startDate	date	Required. The date when the time sheet takes effect.
timeSheetTemplateAssignments	TimeSheetTempbteAsignment	A list of profiles that the template is assigned to.
workWeekEndDay	DaysOfWeek (enumeration of type string)	Required. The end day of the template's work week. One of the following values: Monday Tuesday Wednesday Thursday Friday Saturday Sunday
workWeekStartDay	DaysOfWeek (enumeration of type string)	Required. The start day of the template's work week. One of the following values: • Monday • Tuesday • Wednesday • Thursday • Friday • Saturday • Sunday

TimeSheetTemplateAssignment

Returns a quick action that's associated with an EmbeddedServiceLiveAgent setup. The quick action includes the pre-chat form fields that the embedded chat window displays and shows the order in which the fields are displayed.

Field Name	Field Type	Description
assignedTo	string	The IDs of the user profiles that a time sheet template is assigned to.

Declarative Metadata Sample Definition

The following is an example of a TimeSheetTemplate file.

The following is an example package.xml that references the previous definition.

Wildcard Support in the Manifest File

This metadata type supports the wildcard character * (asterisk) in the package.xml manifest file. For information about using the manifest file, see Deploying and Retrieving Metadata with the Zip File.

Field Service Tooling API

The following Tooling objects are used in Field Service.

IN THIS SECTION:

CleanRule

Represents a data integration rule that controls how a data service adds and updates data for existing records in an org.

TimeSheetTemplate

Represents a template for creating time sheets in Field Service. Available in API version 46.0 and later.

CleanRule

Represents a data integration rule that controls how a data service adds and updates data for existing records in an org.

This object is available in API version 38.0 and later.

Supported SOAP Calls

```
create(), delete(), describeSObjects(), query(), retrieve(), update(), upsert()
```

Supported REST HTTP Methods

GET

Field	Details
CleanDataServiceId	Туре
	reference
	Properties Create, Filter, Group, Sort
	Description A foreign key reference to the CleanDataService that processes this CleanRule.
DataAssessmentStatus	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable
	Description The status of the data assessment. The following are valid values:
	• Hidden (default)
	• Not Started
	• In Progress
	Pending Aggregation
	Aggregation Complete
	• Failed Aggregation
	• Aborted
	This field is read only.
Description	Туре
	textarea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description User-friendly text that describes the data integration rule.
DeveloperName	Туре
	string
	Properties
	Create, Filter, Group, , Sort, Update
	Description This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. This unique name prevents conflicts with rules from other packages that have the same MasterLabel.

Field Details



Note: Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.

IsBulkEnabled

Type

boolean

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

If this flag is set to true, the system automatically applies the rule to existing records whenever the rule is updated or saved. If the flag is set to false, the system doesn't automatically apply the rule to existing records. You can always apply the rule manually.

IsSilentSaveEnabled

Type

boolean

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

If false, updates don't modify LastModifiedDate and LastModifiedById when it applies this rule; otherwise, updates insert the current date and the current user.

Language

Type

picklist

Properties

Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Description

The language of the data integration rule. The following values are permitted:

- Chinese (Simplified): zh CN
- Chinese (Traditional): zh TW
- Danish: da
- Dutch: nl NL
- English: en US
- Finnish: fi
- French: fr
- German: de
- Italian: it
- Japanese: ja
- Korean: ko
- Norwegian: no
- Portuguese (Brazil): pt BR
- Russian: ru

Field	Details
	• Spanish: es
	 Spanish (Mexico): es_MX Spanish (Mexico) defaults to Spanish for customer-defined translations.
	• Swedish: sv
	• Thai: th The Salesforce user interface is fully translated to Thai, but Help is in English.
MatchConfidence	Туре
	double
	Properties Create, Filter, Nillable, Sort, Update
	Description
	Indicates how closely a Lightning Data record matches a Salesforce record. The higher the minimum value is set, the more precise the matches. This field is used in packages that support match scores for third-party data. Valid values include an integer determined by the data service provider. If the value is null, the default value from the data service provider is used. Available in API version 45.0 and later.
MasterLabel	Туре
	string
	Properties Create, Filter, Group, Sort, Update
	Description Master label for this object. This display value is the internal label that is not translated.
MatchRule	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort
	Description An internal label for the matching rule in the data service that's associated with this CleanRule.
ShouldBypassTriggers	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description If true, indicates that the system does not apply triggers when it applies this rule; otherwise, the system applies the triggers.
ShouldBypassWorkflow	Type boolean

Field Details

Properties

Create, Defaulted on create, Filter, Group, Sort, Update

Description

If true, the system bypasses workflow rules when it applies the data integration rule; otherwise, the system applies workflow rules.

SobjectType

Type

picklist

Properties

Create, Filter, Group, Restricted picklist, Sort

Description

The standard or custom object in your org that's acted on by this CleanRule. The possible values are:

- Account
- Address
- Contact
- CustomEntityDefinition
- Lead
- ResourceAbsence
- ServiceAppointment
- ServiceTerritory
- ServiceTerritoryMember
- WorkOrder
- WorkOrderLineItem

In addition, custom objects with data integration rules are possible.



Note: The standard objects are installed with default data integration rules, but only the default rules for account, contact, and lead can be modified.

SourceSobjectType

Type

picklist

Properties

Create, Filter, Group, Nillable, Restricted picklist, Sort

Description

A data service object associated with this CleanRule. The set of picklist values includes all the object types defined in the data service. However, if you specify a non-existent object, the API call returns an error. If you enable the Salesforce data services, the following values appear.

CustomEntityDefinition

Information retrieved from an external source in the form of an external object to enrich an account, contact, or lead. We map the external object fields to the account, contact, and lead lookup and details.

Field	Details
	DataCloudAddress Geolocation data service.
	DatacloudDandBCompany Data.com data service. This service is only available in the Professional, Enterprise, Unlimited, and Performance Editions, and only with a Premium Clean license. Your administrator must enable this data service by enabling the data integration rules for account and lead.
	If you install Marketplace packages that contain data services, their object names also appear in the set of picklist values.
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Status of the data integration rule. Valid values are Active and Inactive.

TimeSheetTemplate

Represents a template for creating time sheets in Field Service. Available in API version 46.0 and later.

Supported SOAP Calls

create(), delete(), describeLayout(), describeSObjects(), query(), retrieve(), update(), upsert()

Supported REST HTTP Methods

GET, POST, PATCH, DELETE

Special Access Rules

Field Service must be enabled to access TimeSheetTemplate. Users must have the Customize Application and Time Sheet Template permissions.

Limitations

SOQL Limitations

Field	Details
Active	Туре
	boolean
	Properties Defaulted On Create, Filter, Group, Sort
	Description Indicates whether the time sheet template is active (true) or not (false).
Description	Type textarea
	Properties Nillable
	Description The time sheet template's description.
DeveloperName	Type string
	Properties Filter, Group, Sort
	Description The API name of the time sheet template. Can contain alphanumeric characters and underscores, and must begin with a letter.
	Note: Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.
Frequency	Type picklist
	Properties Filter, Group, Restricted picklist, Sort
	Description Defines the frequency of the time sheet creation period. One of the following values:
	• Daily
	• Weekly
	• EveryTwoWeeks
	• TwiceAMonth
	• Monthly
Fullname	Туре
	string

Field	Details
	Properties
	Create, Group, Nillable
	Description
	The full name of the associated metadata object in Metadata API. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
Language	Type picklist
	Properties
	Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description
	The language associated with the time sheet template.
ManageableState	Type ManageableState enumerated list
	Properties
	Filter, Group, Nillable, Restricted picklist, Sort
	Description
	Indicates the manageable state of the specified component that is contained in a package:
	• beta
	• deleted
	• deprecated
	• deprecatedEditable
	• installed
	• installedEditable
	• released
	• unmanaged
	Available in API version 48.0 and later.
MasterLabel	Туре
	string
	Properties Silver Cross Cost
	Filter, Group, Sort
	Description The name of the time sheet template.
Metadata	Type mns:TimeSheetTemplate

Details
Properties Create, Nillable, Update
Description
The TimeSheetTemplate metadata.
Туре
string
Properties Filter, Group, Nillable, Sort
Description
The namespace that identifies the package that manages the time sheet template. Available in API version 48.0 and later.
Type date
Properties
Filter, Group, Sort
Description The date when the time sheet takes effect.
nts Tyne
туре
QueryResult
Properties Nillable
Description A list of profiles that the template is assigned to. This field is only visible when the template has been assigned to at least one user profile. Available in API version 48.0 and later.
Type picklist
Properties Defaulted On Create, Filter, Group, Restricted picklist, Sort
Description
The end day of the template's work week. One of the following values:
• Monday
• Tuesday
• Wednesday
• Thursday
• Friday
• Saturday

Field	Details
WorkWeekStartDay	Type picklist
	Properties Defaulted On Create, Filter, Group, Restricted picklist, Sort
	Description The start day of the template's work week. One of the following values:
	• Monday
	• Tuesday
	• Wednesday
	• Thursday
	• Friday
	• Saturday
	Sunday (default)

Field Service Apex Namespace

The Field Service managed package provides the FSL Apex namespace, whose custom methods and functions you can use to extend managed package features programmatically.

IN THIS SECTION:

FSL Apex Namespace

The Field Service (FSL) namespace contains all classes, methods, Visualforce pages, and custom objects within the Field Service managed package. To allow access to namespace elements, assign the FSL custom permission set that's appropriate for the user's persona. For example, to allow a user to book appointments, assign the FSL Agent custom permission set.

SEE ALSO:

Install the Field Service Managed Package

FSL Apex Namespace

The Field Service (FSL) namespace contains all classes, methods, Visualforce pages, and custom objects within the Field Service managed package. To allow access to namespace elements, assign the FSL custom permission set that's appropriate for the user's persona. For example, to allow a user to book appointments, assign the FSL Agent custom permission set.

IN THIS SECTION:

AdvancedGapMatrix Class

Represents a matrix of service resource IDs and graded time slots. An instance of this class is used only within the context of the results returned by the GradeSlotsService class.

AppointmentBookingService Class

Represents the appointment booking scheduling process in field service. Appointment booking returns the available slots for a service appointment, while considering scheduling policies, work rules, and service objectives. For example, we can schedule an appointment tomorrow between 9 and 11 AM, or next Monday between 4 and 6 PM.

AppointmentBookingSlot Class

Represents a booking slot available for a given service appointment. An instance of this class is part of the results returned by the AppointmentBookingService and GradeSlotsService classes.

GradeSlotsService Class

Represents the results shown in the Candidates quick action. Use the GradeSlotsService class to evaluate all possible slots where a given service appointment can be scheduled.

OAAS Class

Contains all the methods used in the available optimization services, such as global or in-day optimizations, reshuffle operations, and resource schedule optimizations.

OAASRequest Class

Represents the request sent in the OAAS.Optimize() method. This class contains all the details of a global optimization call.

PolygonUtils Class

Represents the result of using the getTerritoryIdByPolygons method to return a service territory record ID using latitude and longitude geolocation values. It also returns the map polygon record that the geocoded location is located in.

ResourceScheduleData Class

Contains all the details of a service resource's available slots for a given service appointment. An instance of this class is used only within the context of the results returned by the AdvancedGapMatrix class.

ScheduleResult Class

Represents the result of scheduling a service appointment that is returned by the ScheduleService.schedule method.

ScheduleService Class

Represents the scheduling of a given service appointment in the best available slot based on the applied scheduling policy.

SchedulingOption Class

Provides the details of an individual slot available for scheduling. Represents a run-time object used within the context of the results returned in the AdvancedGapMatrix class.

TimeInterval Class

Holds an interval's start and end times. An instance of this class is used when capturing the start and end times of a scheduling horizon, during which a scheduling process runs. It considers scheduled jobs and is also used to represent the start and end times of an appointment slot or window.

AdvancedGapMatrix Class

Represents a matrix of service resource IDs and graded time slots. An instance of this class is used only within the context of the results returned by the GradeSlotsService class.

Namespace

FSL

Example

For an example of how to parse the class results, see GradeSlotsService Class.

IN THIS SECTION:

AdvancedGapMatrix Properties

AdvancedGapMatrix Properties

AdvancedGapMatrix contains the following properties.

IN THIS SECTION:

FSLOperationId

Populated only when scheduling a chain of two service appointments with scheduling dependencies, also known as complex work. An asynchronous call is made to schedule both service appointments in the chain. This property contains the FSL FSL Operation c ID.

partialResults

Relevant only when Limit Apex Operations is enabled in the Field Service Admin app. If the processing time of the ScheduleService is about to exceed the maximum CPU limits, it returns the results that were already calculated and halts the process. This list contains the details of the partial, processed results. All other parameters are the same.

resourceIDToScheduleData

A map that returns service resource IDs and their corresponding available slots stored in the ResourceScheduleData class.

Service

The service appointment for which the AdvancedGapMatrix was run.

FSLOperationId

Populated only when scheduling a chain of two service appointments with scheduling dependencies, also known as complex work. An asynchronous call is made to schedule both service appointments in the chain. This property contains the FSL_FSL_Operation_c ID.

Signature

```
public Id FSLOperationId {get; set;}
```

Property Value

Type: Id

Usage

To learn more about the complex work feature, see Create Scheduling Dependencies Between Service Appointments.

partialResults

Relevant only when Limit Apex Operations is enabled in the Field Service Admin app. If the processing time of the ScheduleService is about to exceed the maximum CPU limits, it returns the results that were already calculated and halts the process. This list contains the details of the partial, processed results. All other parameters are the same.

Signature

```
public List<FSL.PartialResultsInfo> partialResults {get; set;}
```

Property Value

Type: List<FSL.PartialResultsInfo>

resourceIDToScheduleData

A map that returns service resource IDs and their corresponding available slots stored in the ResourceScheduleData class.

Signature

```
public Map<Id, FSL.ResourceScheduleData> resourceIDToScheduleData {get; set;}
```

Property Value

Type: Map<Id, FSL.ResourceScheduleData>

Service

The service appointment for which the AdvancedGapMatrix was run.

Signature

```
public Service {get; set;}
```

Property Value

Type: ServiceAppointment

AppointmentBookingService Class

Represents the appointment booking scheduling process in field service. Appointment booking returns the available slots for a service appointment, while considering scheduling policies, work rules, and service objectives. For example, we can schedule an appointment tomorrow between 9 and 11 AM, or next Monday between 4 and 6 PM.

Namespace

FSL

Before calling the AppointmentBookingService class, make sure that the parent work order and service appointment already exist.



Note: When scheduling a service appointment, the user scheduling the appointment must have one of four managed package permission sets: Field Service Admin, Field Service Dispatcher, Field Service Agent, Self-Service. If you're using platform events to schedule appointments, you must explicitly configure the user so that the user has the correct permissions. Without the proper configuration, the platform event runs as the Automated Process system user and doesn't have the correct permissions to schedule an appointment. To learn more, see Configure the User and Batch Size for Your Platform Event Trigger.

The time zone is typically based on the location of the customer requesting the service. As a best practice, use the time zone specified on the service territory's operating hours.

If you want to return time slots ordered by grade or by date, use the getSlots() method that accepts a sort parameter; either sortResultsBy or sortBy.

When the AppointmentBookingService class is called, the *ExactAppointment* value on the associated work type is ignored. If exact appointments are needed, set this value to true in the parameters. If you want to respect the *ExactAppointment* of the work type, query it directly from the work type.

After receiving the slots, the developer can decide how to display, or manage, the slots. Typically, the slots are displayed to the customer, who selects a slot. After a slot is selected, the service appointment's ArrivalWindowStartTime and ArrivalWindowEndTime fields are updated with the slot's start and end times; for example:

```
FSL.AppointmentBookingSlot slot = slots[0];
sa.ArrivalWindowStartTime = slot.Interval.Start.addSeconds(tz.getOffset(slot.Interval.Start)
    / -1000);
sa.ArrivalWindowEndTime = slot.Interval.Finish.addSeconds(tz.getOffset(slot.Interval.Finish)
    / -1000);
update sa;
```

The FSL.ScheduleService method is then called so that the service appointment is scheduled correctly within the selected slot.

IN THIS SECTION:

AppointmentBookingService Methods

AppointmentBookingService Methods

AppointmentBookingService includes the following static methods.

IN THIS SECTION:

```
getSlots(serviceID, policyId, operatingHoursId, tz, exactAppointment)
Returns a list of FSL.AppointmentBookingSlot records.
getSlots(serviceID, policyId, calendar, tz, exactAppointment)
Returns a list of FSL.AppointmentBookingSlot records.
getSlots(serviceID, policyId, calendar, tz, sortResults, exactAppointment)
Returns a sorted list of FSL.AppointmentBookingSlot records.
```

getSlots(serviceID, policyId, calendar, tz, sortBy, exactAppointment)

Returns a sorted list of FSL. AppointmentBookingSlot records.

getABSlots(serviceID, policyId, calendar, tz, sortBy, exactAppointment)

Returns a list of FSL. AppointmentBookingSlot records that respect complex work dependencies for a chain of two service appointments.

getSlots(serviceID, policyId, operatingHoursId, tz, exactAppointment)

Returns a list of FSL. AppointmentBookingSlot records.

Signature

public static List<FSL.AppointmentBookingSlot> getSlots(Id serviceID, Id policyId, Id
operatingHoursId, System.TimeZone tz, Boolean exactAppointment)

Parameters

serviceID

Type: Id

Required. The ID of the service appointment being scheduled.

policyId

Type: Id

Required. The ID of the scheduling policy being used.

operatingHoursId

Type: Id

Required. The ID of the operating hours record used to determine time slot intervals.



Note: The TimeZone on the operating hours record is ignored.

tz

Type: System.TimeZone

Required. The time zone in which the slots are returned. This time zone is normally the time zone of the service territory in which the service appointment is performed—in other words, the customer's location. Appointment booking slots must be displayed in the time zone of the customer's location.

exactAppointment

Type: Boolean

Required. Specifies whether the result uses exact appointments or an arrival window. When the <code>getSlots()</code> method is called, the <code>exactAppointment</code> value on the work type is ignored.

Return Value

Type: List<FSL.AppointmentBookingSlot>

Usage

This method returns a list of appointment booking time slots available for a given service appointment. Results are returned in the time zone sent in the original request.

Appointment windows depend on the *operatingHoursId* value provided in the call. The *operatingHoursId* represents various slots offered to the customer during appointment booking (for example, Mondays 9–11 AM, 11 AM–1 PM, 1–3 PM; Tuesdays 9–11 AM, 12–4 PM; and so forth.)

This method only returns available slots and does not schedule the service appointment. After the end user selects the desired slot, update the <code>ArrivalWindowStartTime</code> and <code>ArrivalWindowEndTime</code> properties on the service appointment and call the <code>FSL.ScheduleService</code> method.

Perform a time zone conversion to convert dateTime values to UTC before they are updated in the database.

Example

This example calls the AppointmentBookingService class using the Customer First scheduling policy and the Gold Appointments Calendar operating hours as the desired appointment slots.

getSlots(serviceID, policyId, calendar, tz, exactAppointment)

Returns a list of FSL. AppointmentBookingSlot records.

Signature

```
public static List<FSL.AppointmentBookingSlot> getSlots(Id serviceID, Id policyId,
OperatingHours calendar, System.TimeZone tz, Boolean exactAppointment)
```

```
Parameters

serviceID

Type: Id

Required. The ID of the service appointment being scheduled.

policyId

Type: Id

Required. The ID of the scheduling policy being used.
```

calendar

Type: Operating Hours object

Required. The calendar is used to determine time slot intervals.



Note: The TimeZone on the operating hours record is ignored.

tz

Type: System.TimeZone

Required. The time zone in which the slots are returned. This time zone is normally the time zone of the service territory in which the service appointment is performed—in other words, the customer's location. Appointment booking slots must be displayed in the time zone of the customer's location.

exactAppointment

Type: Boolean

Required. Specifies whether the result uses exact appointments or an arrival window. When the getSlots() method is called, the exactAppointment value on the work type is ignored.

Return Value

Type: List<FSL.AppointmentBookingSlot>

Usage

This method returns a list of appointment booking time slots for a given service appointment. Results are returned in the time zone sent in the original request. The appointment windows (9–11, 11–1, 1–3, and so on) depend on slots returned in a subquery of the Operating Hours object.

This method only returns available slots and does not schedule the service appointment. Update the *ArrivalWindowStartTime* and *ArrivalWindowEndTime* properties on the service appointment and call the FSL.ScheduleService method.

Perform a time zone conversion to convert dateTime values to UTC before they are updated in the database.

Example

This example shows the use of a subquery to retrieve time slots from calendar, an OperatingHours object.

```
for(integer i=0; i<slots.size(); i++){
    system.debug('Slot:'+i+' Start: '+slots[i].Interval.Start+' Finish:'+
    slots[i].Interval.Finish+' Grade: '+slots[i].Grade);
}</pre>
```

getSlots(serviceID, policyId, calendar, tz, sortResults, exactAppointment)

Returns a sorted list of FSL. AppointmentBookingSlot records.

Signature

public static List<FSL.AppointmentBookingSlot> getSlots(Id serviceID, Id policyId,
 OperatingHours calendar, System.TimeZone tz, FSL.AppointmentBookingService.SortResultsBy
 sortResults, Boolean exactAppointment)

Parameters

serviceID

Type: Id

Required. The ID of the service appointment being scheduled.

policyId

Type: Id

Required. The ID of the scheduling policy being used.

calendar

Type: Operating Hours object

Required. The calendar is used to determine time slot intervals.



Note: The TimeZone on the operating hours record is ignored.

tz

Type: System.TimeZone

Required. The time zone in which the slots are returned. This time zone is normally the time zone of the service territory in which the service appointment is performed—in other words, the customer's location. Appointment booking slots must be displayed in the time zone of the customer's location.

sortResults

Type: FSL.AppointmentBookingService.SortResultsBy enumeration

Required. Used to sort AppointmentBookingSlot results that are returned. Possible sort values are Grade, NoSort, and SlotDateTime.

exactAppointment

Type: Boolean

Required. Specifies whether the result uses exact appointments or an arrival window. When the getSlots() method is called, the exactAppointment value on the work type is ignored.

Return Value

Type: List<FSL.AppointmentBookingSlot>

This method returns a sorted list of appointment booking time slots for a given service appointment. Results are returned in the time zone sent in the original request. The appointment windows (9–11, 11–1, 1–3, and so on) depend on slots returned in a subquery of calendar, an Operating Hours object.

This method only returns available slots and doesn't schedule the service appointment. Update the *ArrivalWindowStartTime* and *ArrivalWindowEndTime* properties on the service appointment and call the FSL.ScheduleService method.

Perform a time zone conversion to convert dateTime values to UTC before they are updated in the database.

Example

This example sorts the returned slots by grade. When using a signature that contains a calendar parameter, use a subquery for time slots in the Operating Hours object.

```
// FSL.AppointmentBookingService
// The getSlots method returns a list of AppointmentBookingSlot objects.
ServiceAppointment sa = [SELECT Id, EarliestStartTime, DueDate FROM ServiceAppointment
                            WHERE Id='08p4F0000008sRMQAY'];
Id schedulingPolicyId = [SELECT Id FROM FSL Scheduling Policy c
                            WHERE Name='Customer First' LIMIT 1].Id;
operatinghours oh = new operatinghours();
oh = [SELECT id, (SELECT EndTime, StartTime, Type, DayOfWeek FROM TimeSlots) FROM
OperatingHours
        WHERE name='AB Slot: 2 Hour Slots' LIMIT 1];
Timezone tz = UserInfo.getTimeZone();
FSL.AppointmentBookingService.SortResultsBy sortResults =
FSL.AppointmentBookingService.SortResultsBy.Grade;
List<FSL.AppointmentBookingSlot> slots = FSL.AppointmentBookingService.GetSlots(sa.Id,
schedulingPolicyId, oh, tz, sortResults, false);
System.debug('Returned ' + slots.size() + ' appointment slots');
for(integer i=0; i<slots.size(); i++){</pre>
    system.debug('Slot:'+i+' Start: '+slots[i].Interval.Start+' Finish:'+
slots[i].Interval.Finish+' Grade: '+slots[i].Grade);
```

getSlots(serviceID, policyId, calendar, tz, sortBy, exactAppointment)

Returns a sorted list of FSL. AppointmentBookingSlot records.

Signature

```
public static List<FSL.AppointmentBookingSlot> getSlots(Id serviceID, Id policyId,
    OperatingHours calendar, System.TimeZone tz, String sortBy, Boolean exactAppointment)
```

Parameters

```
serviceID
Type: ld
```

Required. The ID of the service appointment being scheduled.

policyId

Type: Id

Required. The ID of the scheduling policy being used.

calendar

Type: Operating Hours object

Required. The calendar is used to determine time slot intervals.



Note: The TimeZone on the operating hours record is ignored.

tz

Type: System.TimeZone

Required. The time zone in which the slots are returned. This time zone is normally the time zone of the service territory in which the service appointment is performed—in other words, the customer's location. Appointment booking slots must be displayed in the time zone of the customer's location.

sortBy

Type: String

Required. Used to sort AppointmentBookingSlot results. Acceptable values are SORT_BY_GRADE, SORT_BY_DATE, and SORT_BY_NO_SORT.

exactAppointment

Type: Boolean

Required. Specifies whether the result uses exact appointments or an arrival window. When the getSlots() method is called, the exactAppointment value on the work type is ignored.

Return Value

Type: List<FSL.AppointmentBookingSlot>

Usage

This method returns a sorted list of appointment booking time slots for a given service appointment. Results are returned in the time zone sent in the original request. The appointment windows (9–11, 11–1, 1–3, and so on) depend on slots returned in a subquery of calendar, an Operating Hours object.

This method only returns available slots and doesn't schedule the service appointment. Update the *ArrivalWindowStartTime* and *ArrivalWindowEndTime* properties on the service appointment and call the FSL.ScheduleService method.

Perform a time zone conversion to convert dateTime values to UTC before they are updated in the database.

getABSlots(serviceID, policyId, calendar, tz, sortBy, exactAppointment)

Returns a list of FSL. AppointmentBookingSlot records that respect complex work dependencies for a chain of two service appointments.

Signature

public static FSL.ABSlotsResponse getABSlots(Id serviceID, Id policyId, OperatingHours calendar, System.TimeZone tz, String sortBy, Boolean exactAppointment) **Parameters**

serviceID

Type: Id

Required. The ID of the service appointment being scheduled.

policyId

Type: Id

Required. The ID of the scheduling policy being used.

calendar

Type: Operating Hours object

Required. The calendar is used to determine time slot intervals.



Note: The TimeZone on the operating hours record is ignored.

tz

Type: System.TimeZone

Required. The time zone in which the slots are returned. This time zone is normally the time zone of the service territory in which the service appointment is performed—in other words, the customer's location. Appointment booking slots must be displayed in the time zone of the customer's location.

sortBy

Type: String

Required. Used to sort the results. Acceptable values are SORT_BY_GRADE, SORT_BY_DATE, and SORT_BY_NO_SORT.

exactAppointment

Type: Boolean

Required. Specifies whether the result uses exact appointments or an arrival window. When this method is called, the <code>exactAppointment</code> value on the work type is ignored.

Return Value

Type: FSL.ABSlotsResponse

Usage

This method is used to retrieve appointment booking slots for a complex work chain of two appointments. This method respects the complex work setting **Use all-or-none scheduling for related appointments**.

This method is asynchronous. To examine results that this method returns, you can use the streaming API and subscribe to MstCompletedChannel, the channel for the Field Service managed package.

This method only returns available slots and doesn't schedule the service appointment. Update the <code>ArrivalWindowStartTime</code> and <code>ArrivalWindowEndTime</code> properties on the service appointment and call the <code>scheduleExtended</code> method of the FSLScheduleService class.

Perform a time zone conversion to convert dateTime values to UTC before they are updated in the database.

SEE ALSO:

Example: Subscribe to and Replay Events Using a Visualforce Page

AppointmentBookingSlot Class

Represents a booking slot available for a given service appointment. An instance of this class is part of the results returned by the AppointmentBookingService and GradeSlotsService classes.

Namespace

FSL

Example

The debug log shows the relevant parts of the result: Grade and Interval. The BestSlotGrades parameters are private and inaccessible via code.

```
AppointmentBookingSlot:
[
Grade=85.1851851851851851851851851852,
Interval=TimeInterval:
[
2018-01-26 09:00:00,2018-01-26 11:00:00
]
]
```

IN THIS SECTION:

AppointmentBookingSlot Properties

AppointmentBookingSlot Properties

AppointmentBookingSlot contains the following properties.

IN THIS SECTION:

grade

The grade of the available appointment booking slot.

interval

The time frame of the returned appointment booking slot.

grade

The grade of the available appointment booking slot.

```
Signature
```

```
public Decimal grade {get; set;}
```

Property Value

Type: Decimal

interval

The time frame of the returned appointment booking slot.

Signature

public FSL.TimeInterval interval {get; set;}

Property Value

Type: FSL.TimeInterval

GradeSlotsService Class

Represents the results shown in the Candidates quick action. Use the GradeSlotsService class to evaluate all possible slots where a given service appointment can be scheduled.

Namespace

FSL

Usage



Note: When scheduling a service appointment, the user scheduling the appointment must have one of four managed package permission sets: Field Service Admin, Field Service Dispatcher, Field Service Agent, Self-Service. If you're using platform events to schedule appointments, you must explicitly configure the user so that the user has the correct permissions. Without the proper configuration, the platform event runs as the Automated Process system user and doesn't have the correct permissions to schedule an appointment. To learn more, see Configure the User and Batch Size for Your Platform Event Trigger.

IN THIS SECTION:

GradeSlotsService Constructors

GradeSlotsService Methods

GradeSlotsService Constructors

The following are constructors for GradeSlotsService.

IN THIS SECTION:

GradeSlotsService(schedulingPolicyId, serviceAppointmentId)

Creates a new instance of the GradeSlotsService class using the specified scheduling policy ID and service appointment ID.

GradeSlotsService(schedulingPolicyId, serviceAppointmentId)

Creates a new instance of the GradeSlotsService class using the specified scheduling policy ID and service appointment ID.

Signature

public GradeSlotsService(Id schedulingPolicyId, Id serviceAppointmentId)

Parameters

schedulingPolicyId

Type: Id

The record ID of the scheduling policy being used to schedule the service appointment.

serviceAppointmentId

Type: Id

The record ID of the service appointment being scheduled.

GradeSlotsService Methods

GradeSlotsService includes the following static method.

IN THIS SECTION:

```
getGradedMatrix(i_ResultsInUserTimeZone)
```

Returns a matrix of resource IDs and graded time slots. The information is similar to that shown in the Candidates guick action.

getGradedMatrix(i ResultsInUserTimeZone)

Returns a matrix of resource IDs and graded time slots. The information is similar to that shown in the Candidates quick action.

Signature

```
public FSL.AdvancedGapMatrix getGradedMatrix (Boolean i ResultsInUserTimeZone)
```

Parameters

i ResultsInUserTimeZone

Type: Boolean

If true, all DateTimes are returned in the user's time zone. If false, all DateTimes are returned in UTC.

Return Value

Type: FSL.AdvancedGapMatrix

Example

This example illustrates how to parse the results in the FSL.AdvancedGapMatrix to extract the service resource ID, start and end times, and grade of each slot.

```
// FSL.GradeSlotsService class
// The getGradedMatrix method returns a matrix of resource id's AND graded time slots

Id serviceAppointmentId = '08p1N000000qN4sQAE';
Id schedulingPolicyId=[SELECT Id FROM FSL__Scheduling_Policy__c WHERE Name='Customer First'
   LIMIT 1].Id;

// GENERATE the graded time slots for the service appointment
FSL.GradeSlotsService mySlotService = new
FSL.GradeSlotsService(schedulingPolicyId, serviceAppointmentId);
```

```
// STORE the matrix of service resource id's and graded time slots
FSL.AdvancedGapMatrix myResultMatrix = mySlotService.getGradedMatrix(true);

Map<Id,FSL.ResourceScheduleData> mySRGradedTimeSlotMap =
    myResultMatrix.ResourceIDToScheduleData;
for (Id thisresourceid : mySRGradedTimeSlotMap.keySet()){
        for (FSL.SchedulingOption thisso :
        mySRGradedTimeSlotMap.get(thisresourceid).SchedulingOptions) {
            system.debug('***** Resource Id' + thisresourceid);
            system.debug('***** Start - ' + thisso.Interval.Start);
            system.debug('****** Finish - ' + thisso.Interval.Finish);
            system.debug('******* Grade - ' + thisso.Grade);
        }
}
```

OAAS Class

Contains all the methods used in the available optimization services, such as global or in-day optimizations, reshuffle operations, and resource schedule optimizations.

Namespace

FSL

IN THIS SECTION:

OAAS Methods

OAAS Methods

OAAS includes the following methods.

IN THIS SECTION:

optimize(request)

Returns the optimization request ID of the global optimization process that was triggered. If the scheduling policy includes an in-day optimization Boolean that's set to true, the request triggers an in-day optimization.

reshuffle(serviceld, policyld)

Returns the optimization request ID of a reshuffle operation that has begun on a given service appointment.

resourceDayOptimization(resourceId, policyId, horizon, includeAllTasks, includeOnlyResourceFutureSA, radius, candidateSasFields, unschedulableServicesField, maxOptRuntime)

Returns the optimization request ID with the details of the optimization call. This method runs resource schedule optimization—the optimization of a single service resource's schedule—using the parameters provided.

resourceDayOptimization(resourceId, policyId, horizon, includeAllTasks, includeOnlyResourceFutureSA, radius, candidateSasFields, unschedulableServicesField, maxOptRuntime, nowTimeOnSchedule)

Returns the optimization request ID with the details of the optimization call. This method runs resource schedule optimization—the optimization of a single service resource's schedule—using the parameters provided.

resourceDayOptimization(resourceId, policyId, horizon, includeAllTasks, includeOnlyResourceFutureSA, radius, candidateSas, unschedulableServices, maxOptRuntime)

Returns the optimization request ID with the details of the optimization call. This method runs resource schedule optimization—the optimization of a single service resource's schedule—using the parameters provided.

resourceDayOptimization(resourceId, policyId, horizon, includeAllTasks, includeOnlyResourceFutureSA, radius, candidateSas, unschedulableServices, maxOptRuntime, nowTimeOnSchedule)

Returns the optimization request ID with the details of the optimization call. This method runs resource schedule optimization—the optimization of a single service resource's schedule—using the parameters provided.

optimize (request)

Returns the optimization request ID of the global optimization process that was triggered. If the scheduling policy includes an in-day optimization Boolean that's set to true, the request triggers an in-day optimization.

Signature

```
public static Id optimize(FSL.OAASRequest request)
```

Parameters

request

Type: FSL.OAASRequest

The optimization request.

Return Value

Type: Id

Record ID of the optimization request.

Example

This example creates an instance of the OAASRequest class that holds all the details of the optimization call being initiated. Next, the example calls the optimize method and passes in the request.

```
DateTime start=Datetime.now();
DateTime finish=Datetime.now().addDays(3);

LIST<Id> lstServiceTerritories = new List<Id>();
lstServiceTerritories.add('OHhObOOOOOCIwsCAE');

FSL.OAASRequest oaasRequest = new FSL.OAASRequest();
oaasRequest.allTasksMode = true;
oaasRequest.filterFieldAPIName = null;
oaasRequest.start = start;
oaasRequest.start = start;
oaasRequest.includeServicesWithEmptyLocation = false;
oaasRequest.locations = lstServiceTerritories;
oaasRequest.schedulingPolicyID = 'aON4EOOOOO31HKkUAM';

FSL.OAAS oaas = new FSL.OAAS();
id optRequest = oaas.optimize(oaasRequest);
```

reshuffle(serviceId, policyId)

Returns the optimization request ID of a reshuffle operation that has begun on a given service appointment.

Signature

```
public static Id reshuffle(Id serviceId, Id policyId)
```

Parameters

serviceId

Type: Id

The record ID of the service appointment that must be scheduled.

policyId

Type: Id

The record ID of the scheduling policy being used to schedule the service appointment.

Return Value

Type: Id

Record ID of the optimization request.

Usage

The Reshuffle action is used when a high-priority service appointment must be scheduled within a full schedule. It runs a "mini-optimization" that attempts to reshuffle the schedule to accommodate the appointment.

To learn more about the Reshuffle action, see Reschedule Service Appointments.

Example

```
FSL.OAAS oaas = new FSL.OAAS();
id optRequest = oaas.reshuffle('08p4E000000M21CQAS', 'a0N4E0000031HKkUAM');
```

resourceDayOptimization(resourceId, policyId, horizon, includeAllTasks,
includeOnlyResourceFutureSA, radius, candidateSasFields, unschedulableServicesField,
maxOptRuntime)

Returns the optimization request ID with the details of the optimization call. This method runs resource schedule optimization—the optimization of a single service resource's schedule—using the parameters provided.

Signature

public static Id resourceDayOptimization(Id resourceId, Id policyId, FSL.TimeInterval horizon, Boolean includeAllTasks, Boolean includeOnlyResourceFutureSA, Decimal radius, String candidateSasFields, String unschedulableServicesField, Decimal maxOptRuntime)

Parameters

resourceId

Type: Id

The record ID of the service resource whose schedule is being optimized.

policyId

Type: Id

The record ID of the scheduling policy being used to schedule the service appointment.

horizon

Type: FSL.TimeInterval

The time frame used to run resource schedule optimization.

includeAllTasks

Type: Boolean

If true, all relevant service appointments within the time frame are considered during optimization. If false, only unscheduled service appointments are considered, and all scheduled service appointments are pinned (unmovable).

includeOnlyResourceFutureSA

Type: Boolean

If true, only service appointments that are already assigned to the service resource are considered during optimization. If false, service appointments assigned to other service resources are also considered.

radius

Type: Decimal

The suggested distance between required service appointments and adjacent appointments. Required appointments are defined by the unschedulableServicesField parameter. Resource schedule optimization tries to group service appointments so that their distance from a required appointment is less than this radius. Appointments that are further from a required appointment can still be scheduled, but are deprioritized. If null, the data is not filtered based on the radius.

candidateSasFields

Type: String

Boolean service appointment field that indicates which appointments are candidates to be scheduled.

unschedulableServicesField

Type: String

Boolean service appointment field that indicates whether a service appointment is required (pinned), meaning it must remain on the schedule during resource schedule optimization.

maxOptRuntime

Type: Decimal

Total time in seconds during which the optimization results must be returned. This parameter only enforces the optimization time, and does not include optimization queue or Apex job queue times. If null, the default value of 30 seconds is used.

Usage

To learn more about resource schedule optimization, see Optimize a Single Resource's Schedule.

Return Value

Type: Id

Record ID of the optimization request.

resourceDayOptimization(resourceId, policyId, horizon, includeAllTasks,
includeOnlyResourceFutureSA, radius, candidateSasFields, unschedulableServicesField,
maxOptRuntime, nowTimeOnSchedule)

Returns the optimization request ID with the details of the optimization call. This method runs resource schedule optimization—the optimization of a single service resource's schedule—using the parameters provided.

Signature

public static Id resourceDayOptimization(Id resourceId, Id policyId, FSL.TimeInterval horizon, Boolean includeAllTasks, Boolean includeOnlyResourceFutureSA, Decimal radius, String candidateSasFields, String unschedulableServicesField, Decimal maxOptRuntime, Datetime nowTimeOnSchedule)

Parameters

resourceId

Type: Id

The record ID of the service resource whose schedule is being optimized.

policyId

Type: Id

The record ID of the scheduling policy being used to schedule the service appointment.

horizon

Type: FSL.TimeInterval

The time frame used to run resource schedule optimization.

includeAllTasks

Type: Boolean

If true, all relevant service appointments within the time frame are considered during optimization. If false, only unscheduled service appointments are considered, and all scheduled service appointments are pinned (unmovable).

$include {\it Only} Resource Future {\it SA}$

Type: Boolean

If true, only service appointments that are already assigned to the service resource are considered during optimization. If false, service appointments assigned to other service resources are also considered.

radius

Type: Decimal

The suggested distance between required service appointments and adjacent appointments. Required appointments are defined by the unschedulableServicesField and nowTimeOnSchedule parameters. Resource schedule optimization tries to group service appointments so that their distance from a required appointment is less than this radius. Appointments that are further from a required appointment can still be scheduled, but are deprioritized. If null, the data is not filtered based on the radius.

candidate Sas Fields

Type: String

Boolean service appointment field that indicates which appointments are candidates to be scheduled.

unschedulableServicesField

Type: String

Boolean service appointment field that indicates whether a service appointment is required (pinned), meaning it must it must remain on the schedule during resource schedule optimization.

maxOptRuntime

Type: Decimal

Total time in seconds during which the optimization results must be returned. This parameter only enforces the optimization time, and does not include optimization queue or Apex job queue times. If null, the default value of 30 seconds is used.

nowTimeOnSchedule

Type: Datetime

An appointment whose scheduled start time is earlier than this time is considered required and isn't updated during resource schedule optimization. Because resource schedule optimization is asynchronous, this parameter indicates when optimization was initiated. For example, if nowTimeOnSchedule is set to April 17, 2018, 10:30, appointments with an earlier scheduled start time are considered required and excluded from resource schedule optimization.

Return Value

Type: Id

Record ID of the optimization request.

Usage

To learn more about resource schedule optimization, see Optimize a Single Resource's Schedule.

Example

To use this code sample, replace the ID placeholders—for example, $Service\ Appointment\ ID$ —with record IDs from your org. Surround the IDs with single quotes: '08p4E00000017Gq'.

```
FSL.OAAS a = new FSL.OAAS();
//SET the horizon interval
DateTime start = DateTime.newInstanceGmt(DateTime.Now().dateGmt(),
Time.newInstance(0,0,0,0);
DateTime finish = start.addDays(3);
FSL.TimeInterval horizon = new FSL.TimeInterval(start, finish);
//SELECT the candidatesServices
List<ServiceAppointment> services = [SELECT Id FROM ServiceAppointment WHERE Id IN
    (Service Appointment ID, Service Appointment ID) ];
SET<Id> candidatesIds = new SET<Id>();
FOR(ServiceAppointment service : services) {
    candidatesIds.add(service.Id);
}
//SET the RSO required appointment services
Set<Id> requiredSaIds = new Set<Id>();
List<ServiceAppointment> services2 = [SELECT Id FROM ServiceAppointment WHERE Id=Service
Appointment ID];
```

```
FOR(ServiceAppointment service : services2) {
    requiredSaIds.add(service.Id);
}

//START the RSO process
Id requestId = a.resourceDayOptimization(Service Resource ID, Scheduling Policy ID,
horizon, false, true, 50, candidatesIds, requiredSaIds, 60, DateTime.newInstance(2018, 1, 0, 0, 0, 0));
```

resourceDayOptimization(resourceId, policyId, horizon, includeAllTasks,
includeOnlyResourceFutureSA, radius, candidateSas, unschedulableServices,
maxOptRuntime)

Returns the optimization request ID with the details of the optimization call. This method runs resource schedule optimization—the optimization of a single service resource's schedule—using the parameters provided.

Signature

public static Id resourceDayOptimization(Id resourceId, Id policyId, FSL.TimeInterval horizon, Boolean includeAllTasks, Boolean includeOnlyResourceFutureSA, Decimal radius, Set<String> candidateSas, Set<String> unschedulableServices, Decimal maxOptRuntime)

Parameters

resourceId

Type: Id

The record ID of the service resource whose schedule is being optimized.

policyId

Type: Id

The record ID of the scheduling policy being used to schedule the service appointment.

horizon

Type: FSL.TimeInterval

The time frame used to run resource schedule optimization.

includeAllTasks

Type: Boolean

If true, all relevant service appointments within the time frame are considered during optimization. If false, only unscheduled service appointments are considered, and all scheduled service appointments are pinned (unmovable).

includeOnlyResourceFutureSA

Type: Boolean

If true, only service appointments that are already assigned to the service resource are considered during optimization. If false, service appointments assigned to other service resources are also considered.

radius

Type: Decimal

The suggested distance between required service appointments and adjacent appointments. Required appointments are defined by the <code>unschedulableServices</code> parameter. Resource schedule optimization tries to group service appointments so that

their distance from a required appointment is less than this radius. Appointments that are further from a required appointment can still be scheduled, but are deprioritized. If null, the data is not filtered based on the radius.

candidateSas

Type: Set<Id>

Set of IDs of service appointments that are candidates for scheduling.

unschedulableServices

Type: Set<Id>

Set of IDs of service appointments that are required (pinned), meaning they must remain on the schedule during resource schedule optimization

maxOptRuntime

Type: Decimal

Total time in seconds during which the optimization results must be returned. This parameter only enforces the optimization time, and does not include optimization queue or Apex job queue times. If null, the default value of 30 seconds is used.

Usage

To learn more about resource schedule optimization, see Optimize a Single Resource's Schedule.

Return Value

Type: Id

Record ID of the optimization request.

resourceDayOptimization(resourceId, policyId, horizon, includeAllTasks,
includeOnlyResourceFutureSA, radius, candidateSas, unschedulableServices,
maxOptRuntime, nowTimeOnSchedule)

Returns the optimization request ID with the details of the optimization call. This method runs resource schedule optimization—the optimization of a single service resource's schedule—using the parameters provided.

Signature

public static Id resourceDayOptimization(Id resourceId, Id policyId, FSL.TimeInterval horizon, Boolean includeAllTasks, Boolean includeOnlyResourceFutureSA, Decimal radius, Set<String> candidateSas, Set<String> unschedulableServices, Decimal maxOptRuntime, Datetime nowTimeOnSchedule)

Parameters

resourceId

Type: Id

The record ID of the service resource whose schedule is being optimized.

policyId

Type: Id

The record ID of the scheduling policy being used to schedule the service appointment.

horizon

Type: FSL.TimeInterval

The time frame used to run resource schedule optimization.

includeAllTasks

Type: Boolean

If true, all relevant service appointments within the time frame are considered during optimization. If false, only unscheduled service appointments are considered, and all scheduled service appointments are pinned (unmovable).

includeOnlyResourceFutureSA

Type: Boolean

If true, only service appointments that are already assigned to the service resource are considered during optimization. If false, service appointments assigned to other service resources are also considered.

radius

Type: Decimal

The suggested distance between required service appointments and adjacent appointments. Required appointments are defined by the <code>unschedulableServices</code> and <code>nowTimeOnSchedule</code> parameters. Resource schedule optimization tries to group service appointments so that their distance from a required appointment is less than this radius. Appointments that are further from a required appointment can still be scheduled, but are deprioritized. If <code>null</code>, the data is not filtered based on the radius.

candidateSas

Type: Set<Id>

Set of IDs of service appointments that are candidates for scheduling.

unschedulableServices

Type: Set<ld>

Set of IDs of service appointments that are required, meaning they must remain on the schedule during resource schedule optimization. These appointments may be moved to a different time slot, but they will continue to comply with their Earliest Start Permitted and Due Date values.

maxOptRuntime

Type: Decimal

Total time in seconds during which the optimization results must be returned. This parameter only enforces the optimization time, and does not include optimization queue or Apex job queue times. If null, the default value of 30 seconds is used.

nowTimeOnSchedule

Type: Datetime

Optional. An appointment whose scheduled start time is earlier than this time is considered required and isn't updated during resource schedule optimization. Because resource schedule optimization is asynchronous, this parameter indicates when optimization was initiated. For example, if nowTimeOnSchedule is set to April 17, 2018, 10:30, appointments with an earlier scheduled start time are considered required and excluded from resource schedule optimization.

Return Value

Type: Id

Record ID of the optimization request.

Usage

To learn more about resource schedule optimization, see Optimize a Single Resource's Schedule.

Example

```
FSL.OAAS a = new FSL.OAAS();
//SET the horizon interval
DateTime start = DateTime.newInstanceGmt(DateTime.Now().dateGmt(),
Time.newInstance(0,0,0,0);
DateTime finish = start.addDays(3);
FSL.TimeInterval horizon = new FSL.TimeInterval(start,finish);
//SELECT the candidatesServices
List<ServiceAppointment> services = [SELECT Id FROM ServiceAppointment WHERE Id IN
('08p4E00000017Gp','08p4E00000017Go') ];
SET<Id> candidatesIds = new SET<Id>();
FOR(ServiceAppointment service : services) {
   candidatesIds.add(service.Id);
//SET the RSO required appointment services
Set<Id> requiredSaIds = new Set<Id>();
List<ServiceAppointment> services2 = [SELECT Id FROM ServiceAppointment WHERE
Id='08p4E00000017Gq'];
FOR(ServiceAppointment service : services2) {
    requiredSaIds.add(service.Id);
//START the RSO process
Id requestId =
a.resourceDayOptimization('OHn4E0000004JRS','alw4E000000Ac6S',horizon,false,true,50,
   candidatesIds, requiredSaIds, 60, DateTime.newInstance(2018,1,0,0,0,0));
```

OAASRequest Class

Represents the request sent in the OAAS. Optimize () method. This class contains all the details of a global optimization call.

Namespace

FSL

IN THIS SECTION:

OAASRequest Properties

OAASRequest Properties

OAASRequest contains the following properties.

IN THIS SECTION:

allTasksMode

If true, all service appointments within the time frame are considered during optimization. If false, only unscheduled appointments are considered, and scheduled appointments are pinned (unmovable).

filterFieldAPIName

The API name of a Boolean service appointment field. Only service appointments on which the Boolean field is set to true are optimized.

start

The start of the time frame in which the optimization process considers data for scheduling.

finish

The end of the time frame in which the optimization process considers data for scheduling.

include Services With Empty Location

If true, service appointments both with and without an associated service territory are considered during optimization. If false, only appointments with an associated service territory are considered.

locations

A list of IDs of service territories for which optimization will run.

numberOfServicesToSchedule

Not currently in use. Leave as null.

schedulingPolicyId

The record ID of the scheduling policy that is used to schedule the service appointment.

allTasksMode

If true, all service appointments within the time frame are considered during optimization. If false, only unscheduled appointments are considered, and scheduled appointments are pinned (unmovable).

Signature

```
public Boolean allTasksMode {get; set;}
```

Property Value

Type: Boolean

filterFieldAPIName

The API name of a Boolean service appointment field. Only service appointments on which the Boolean field is set to true are optimized.

Signature

```
public String filterFieldAPIName {get; set;}
```

Property Value

Type: String

start

The start of the time frame in which the optimization process considers data for scheduling.

```
Signature

public Datetime start {get; set;}

Property Value
```

finish

Type: Datetime

The end of the time frame in which the optimization process considers data for scheduling.

Signature

```
public Datetime finish {get; set;}
```

Property Value

Type: Datetime

includeServicesWithEmptyLocation

If true, service appointments both with and without an associated service territory are considered during optimization. If false, only appointments with an associated service territory are considered.

Signature

```
public Boolean includeServicesWithEmptyLocation {get; set;}
```

Property Value

Type: Boolean

locations

A list of IDs of service territories for which optimization will run.

Signature

```
public List<Id> locations {get; set;}
```

Property Value

Type: List<Id>

numberOfServicesToSchedule

Not currently in use. Leave as null.

Signature

```
public Integer numberOfServicesToSchedule {get; set;}
```

Property Value

Type: Integer

schedulingPolicyId

The record ID of the scheduling policy that is used to schedule the service appointment.

Signature

public Id schedulingPolicyId {get; set;}

Property Value

Type: Id

PolygonUtils Class

Represents the result of using the getTerritoryIdByPolygons method to return a service territory record ID using latitude and longitude geolocation values. It also returns the map polygon record that the geocoded location is located in.

Namespace

FSL

Usage

Before calling the PolygonUtils class, make sure that you have existing map polygon records that are associated with a service territory.

If **Base service appointment territories on polygons** is enabled, global actions consume this class to populate the Service Territory field on service appointments. When standard FSL Global Actions are not being used, you can use the <code>getTerritoryIdByPolygons</code> method to populate the Service Territory lookup field on objects.

For more information, see Create and Manage Map Polygons.

IN THIS SECTION:

PolygonUtils Methods

PolygonUtils Methods

PolygonUtils includes the following static method.

IN THIS SECTION:

getTerritoryIdByPolygons(longitude, latitude)

Returns a service territory record ID from longitude and latitude values.

getTerritoryIdByPolygons(longitude, latitude)

Returns a service territory record ID from longitude and latitude values.

```
Signature
```

```
static Id getTerritoryIdByPolygons(Double longitude, Double latitude))
```

Parameters

longitude

Type: Double

Required. The longitude value of the geolocation to be used to retrieve a service territory record ID via Polygon Classification.

latitude

Type: Double

Required. The latitude value of the geolocation to be used to retrieve a service territory record ID via Polygon Classification.

Return Value

Type: Id

Usage

This method returns a service territory record ID from longitude and latitude values.

Example

This example retrieves a service territory record ID using latitude and longitude geolocation fields.

```
//fetch Service Appointment record(s)
List<ServiceAppointment> sas = [select id, latitude, longitude from serviceappointment
where appointmentnumber = 'SA-3600' limit 1];
If(!sas.isEmpty()) {
    //retrieve the service territory record id from the getTerritoryIdByPolygons method
using geolocation fields from the first appointment in the list
    Id ServiceTerritoryId =
FSL.PolygonUtils.getTerritoryIdByPolygons(double.valueOf(sas[0].longitude),double.valueOf(sas[0].latitude));
    system.debug(ServiceTerritoryId);
}
```

ResourceScheduleData Class

Contains all the details of a service resource's available slots for a given service appointment. An instance of this class is used only within the context of the results returned by the AdvancedGapMatrix class.

Namespace

FSL

Usage

For more information, see AdvancedGapMatrix.

IN THIS SECTION:

ResourceScheduleData Properties

ResourceScheduleData Properties

ResourceScheduleData contains the following properties.

IN THIS SECTION:

current Slots Index In AB

Index of the slot.

resource

Not currently in use.

schedulingOptions

A list of all possible scheduling options for the service resource.

currentSlotsIndexInAB

Index of the slot.

Signature

```
public Integer currentSlotsIndexInAB {get; set;}
```

Property Value

Type: Integer

resource

Not currently in use.

Signature

```
public FSL.EncapsulatedResource resource {get; set;}
```

Property Value

Type: FSL.EncapsulatedResource

schedulingOptions

A list of all possible scheduling options for the service resource.

Signature

```
public List<FSL.SchedulingOption> schedulingOptions {get; set;}
```

Property Value

Type: List<FSL.SchedulingOption>

ScheduleResult Class

Represents the result of scheduling a service appointment that is returned by the ScheduleService.schedule method.

Namespace

FSL

Example

This example shows the contents of a returned ScheduledResult object.

```
BreakObject=null,
LongOperationId=null,
PartialResults=(),
Resource=ServiceResource:
{Id=0Hn4E0000004bucSAA, Name=Crew A, IsActive=true, IsCapacityBased=false, ResourceType=C,
ServiceCrewId=1cr4E0000004CM7QAM, Contractor Priority c=2},
Service=ServiceAppointment:
{Id=08p4E000000LeMiQAK, Status=None, FSL_Same_Day_c=false, FSL_Same_Resource_c=false,
AppointmentNumber=SA-6214, DueDate=2018-09-20 17:07:00, EarliestStartTime=2018-09-17
17:07:00, Duration=1.5, DurationType=Hours, Latitude=37.793872000000000,
Longitude=-122.394865000000000, FSL InternalSLRGeolocation Latitude s=37.793834,
FSL InternalSLRGeolocation Longitude s=-122.395123, ServiceTerritoryId=0Hh4E00000000tPSAU,
FSL Schedule over lower priority appointment c=false, FSL Use Async Logic c=false,
FSL IsMultiDay c=false, ParentRecordId=0W04E000000V16rWAC, FSL Emergency c=false,
SchedStartTime=2018-09-17 17:13:00, SchedEndTime=2018-09-17 18:43:00,
FSL Schedule Mode c=Automatic, FSL Scheduling Policy Used c=a0N4E0000031HPVUA2}
```

IN THIS SECTION:

ScheduleResult Properties

ScheduleResult Properties

ScheduleResult contains the following properties.

IN THIS SECTION:

breakObject

Not currently in use.

grade

The grade of the slot in which the service appointment was scheduled.

longOperationId

Populated only when scheduling a chain of two service appointments, also known as complex work. An asynchronous call is made to schedule both service appointments in the chain. This property contains the FSL Operation c ID.

partialResults

Relevant only when Limit Apex Operations is enabled in the Field Service Admin app. If the processing time of the ScheduleService is about to exceed the maximum CPU limits, partialResults returns the results that were already calculated and halts the process. This list contains the details of the partial, processed results.

serviceResource

The service resource assigned to the service appointment.

serviceAppointment

The scheduled service appointment.

breakObject

Not currently in use.

Signature

```
public ResourceAbsence breakObject {get; set;}
```

Property Value

Type: ResourceAbsence

grade

The grade of the slot in which the service appointment was scheduled.

Signature

```
public Decimal grade {get; set;}
```

Property Value

Type: Decimal

longOperationId

Populated only when scheduling a chain of two service appointments, also known as complex work. An asynchronous call is made to schedule both service appointments in the chain. This property contains the FSL Operation c ID.

Signature

```
public Id longOperationId {get; set;}
```

Property Value

Type: Id

To learn more about the complex work feature, see Create a Chain of Related Service Appointments for Field Service.

partialResults

Relevant only when Limit Apex Operations is enabled in the Field Service Admin app. If the processing time of the ScheduleService is about to exceed the maximum CPU limits, partialResultsreturns the results that were already calculated and halts the process. This list contains the details of the partial, processed results.

Signature

```
public List<FSL.PartialResultsInfo> partialResults {get; set;}
```

Property Value

Type: List<FSL.PartialResultsInfo>

serviceResource

The service resource assigned to the service appointment.

Signature

```
public ServiceResource serviceResource {get; set;}
```

Property Value

Type: ServiceResource

serviceAppointment

The scheduled service appointment.

Signature

```
public ServiceAppointment serviceAppointment {get; set;}
```

Property Value

Type: ServiceAppointment

ScheduleService Class

Represents the scheduling of a given service appointment in the best available slot based on the applied scheduling policy.

Namespace

FSL

This class calls the scheduling engine and schedules the given service appointment in the highest-scoring available slot.



Note: When scheduling a service appointment, the user scheduling the appointment must have one of four managed package permission sets: Field Service Admin, Field Service Dispatcher, Field Service Agent, Self-Service. If you're using platform events to schedule appointments, you must explicitly configure the user so that the user has the correct permissions. Without the proper configuration, the platform event runs as the Automated Process system user and doesn't have the correct permissions to schedule an appointment. To learn more, see Configure the User and Batch Size for Your Platform Event Trigger.

IN THIS SECTION:

ScheduleService Methods

ScheduleService Methods

ScheduleService includes the following static methods.

IN THIS SECTION:

```
schedule(policy, serviceld)
```

Returns FSL.ScheduleResult with the result of the scheduling process.

scheduleExtended(policy, serviceId)

Returns FSL. ScheduleResult with the result of the scheduling process for appointments in a complex work chain.

schedule(policy, serviceId)

Returns FSL.ScheduleResult with the result of the scheduling process.

Signature

```
public static FSL.ScheduleResult schedule(Id policy, Id serviceId)
```

Parameters

policy

Type: Id

The record ID of the scheduling policy being used to schedule the service appointment.

serviceId

Type: Id

The record ID of the service appointment being scheduled.

Return Value

Type: FSL. ScheduleResult

This method schedules the service appointment in the best available slot. If there are no available slots, the appointment isn't scheduled. This method can be called with only one service appointment at a time. To schedule multiple service appointments, use an Apex batch class. Call this method in batches of one.

If you are using the schedule method with the appointment booking method, perform a time zone conversion. The results of appointment booking are returned in the time zone specified in the method signature. Convert these values back to UTC.

Example

```
// FSL.ScheduleService class
// The Schedule method returns a ScheduleResult result
FSL.ScheduleResult myResult = new FSL.ScheduleResult();

// static FSL.ScheduleResult Schedule(Scheduling Policy ID, Service Appointment ID)
myResult = FSL.ScheduleService.schedule(Scheduling Policy ID, Service Appointment ID);
System.debug(myResult);
```

scheduleExtended(policy, serviceId)

Returns FSL. ScheduleResult with the result of the scheduling process for appointments in a complex work chain.

Signature

```
public static FSL.ScheduleResult scheduleExtended(Id policy, Id serviceId)
```

Parameters

policy

Type: Id

The record ID of the scheduling policy that's used to schedule the service appointment.

serviceId

Type: Id

The record ID of a service appointment in a complex work chain of two appointments that are being scheduled.

Return Value

Type: FSL.ScheduleResult

Usage

Use this method to schedule two service appointments in a complex work chain. This method respects the complex work setting **Use all-or-none scheduling for related appointments**. If there are no available slots, appointments in the complex work chain aren't scheduled.

The scheduleExtended method is valid for a chain of two appointments; if the appointment in serviceId has dependencies with more than one other appointment, scheduling results can be different than expected.

This method can be called with only one service appointment at a time, and runs asynchronously. To examine results that this method returns, you can use the streaming API and subscribe to MstCompletedChannel, the channel for the Field Service managed package.

If you are using the scheduleExtended method with the appointment booking method, perform a time zone conversion. The results of appointment booking are returned in the time zone specified in the method signature. Convert these values back to UTC.

SEE ALSO:

Example: Subscribe to and Replay Events Using a Visualforce Page

SchedulingOption Class

Provides the details of an individual slot available for scheduling. Represents a run-time object used within the context of the results returned in the AdvancedGapMatrix class.

Namespace

FSL

IN THIS SECTION:

SchedulingOption Properties

SchedulingOption Properties

SchedulingOption contains the following properties.

IN THIS SECTION:

grade

The grade of the available slot.

interval

The time frame of the returned slot.

grade

The grade of the available slot.

```
Signature
```

```
public Decimal grade {get; set;}
```

Property Value

Type: Decimal

interval

The time frame of the returned slot

```
Signature
```

```
public FSL.TimeInterval interval {get; set;}
```

Property Value

Type: FSL.TimeInterval

TimeInterval Class

Holds an interval's start and end times. An instance of this class is used when capturing the start and end times of a scheduling horizon, during which a scheduling process runs. It considers scheduled jobs and is also used to represent the start and end times of an appointment slot or window.

Namespace

FSL

IN THIS SECTION:

TimeInterval Properties

TimeInterval Methods

TimeInterval Properties

TimeInterval contains the following properties.

IN THIS SECTION:

start

The start time of the TimeInterval class.

finish

The end time of the TimeInterval class.

start

The start time of the TimeInterval class.

```
Signature
```

```
public Datetime start {get; set;}
```

Property Value

Type: Datetime

finish

The end time of the TimeInterval class.

Signature

```
public Datetime finish {get; set;}
```

Property Value

Type: Datetime

TimeInterval Methods

TimeInterval includes the following method.

IN THIS SECTION:

toString()

Returns the start and end datetimes as a string.

toString()

Returns the start and end datetimes as a string.

Signature

public String toString()

Return Value

Type: String

Field Service Custom Triggers

Field Service custom triggers ensure that the objects and respective fields are processed before or after scheduling.

The Field Service package provides triggers on Salesforce objects. Each trigger checks for various conditions and then performs tasks based on what it finds. Some of the triggers run on custom objects and some on standard objects.

Table 5: Field Service Quick Reference for Triggers

Trigger Name	Host Object	Object Type
FSLTR021_AssignedResource.trigger	Assigned Resource	Standard Object
FSLTR004_Event.trigger	Event	Standard Object
FSLTR030_GanttPalette.trigger	Gantt Palette	Custom Object
FSLTR029_GanttFilter.trigger	Gantt Filter	Custom Object
FSLTR034_OperatingHours.trigger	Operating Hours	Standard Object
FSLTR013_OptimizationRequest.trigger	Optimization Request	Custom Object
FSLTR028_Polygon.trigger	Map Polygon	Custom Object
FSLTR007_ResourceAbsence.trigger	Resource Absence	Standard Object
FSLTR010_SchedulingPolicy.trigger	Scheduling Policy	Custom Object
FSLSchedulingPolicyWorkRule.trigger	Scheduling Policy Work Rule	Custom Object

Trigger Name	Host Object	Object Type
FSLTR001_Service.trigger	Service Appointment	Standard Object
FSLTR008_ServiceResource.trigger	Service Resource	Standard Object
FSLTR012_Capacity.trigger	Service Resource Capacity	Standard Object
FSLTR066_ServiceObjective.trigger	Service Objective	Custom Object
FSLTR025_ServiceResourceSkill.trigger	Service Resource Skill	Standard Object
FSLTR0023_ServiceTerritory.trigger	Service Territory	Standard Object
FSLTR020_ResourceTerritories.trigger	Service Territory Member	Standard Object
FSLTR0024_ServiceTerritory.trigger	Skill Requirement	Standard Object
FSLTR051_TimeDependency.trigger	Time Dependency	Custom Object
FSLTR027_TimeSlot.trigger	Time Slot	Standard Object
FSLTR005_UserTerritory.trigger	User Territory	Custom Object
FSLTR022_WorkOrder.trigger	Work Order	Standard Object
FSLTR026_WorkRule.trigger	Work Rule	Custom Object
FSLTR022_WorkOrderLineItem.trigger	Work Order Line Item	Standard Object

Assigned Resource

Before Insert:

- Stops the trigger execution if one of the created resources is crew members. This situation is handled in a different flow.
- Fails the trigger if the inserted assigned resources don't have the scheduled start and schedule end time fields populated.
- Fails the trigger if the created resources don't have a valid service territory member assigned to them.
- Populates the created resource's ServiceCrewld field if the resources are from type Crew.

After Insert:

- If the Enable User Territories sharing setting is enabled, this trigger shares the created service appointment with the service territory public group. This behavior provides sharing to the dispatchers that are part of the service appointment territory.
- If the Enable User Territories sharing setting is enabled and the respective service appointment parent sharing setting is enabled, this trigger shares the created service appointment's parent with the service territory public group. This action provides sharing to the dispatchers that are part of the service appointment territory. To learn more, see Limit Access to Field Service Records.
- If the status categories change to Dispatched, this trigger shares the created resource's service appointments with the service resource's users. If the service territories change, this trigger shares with the service territory public groups.
- Mentions the assigned resource user if the relevant setting is enabled.
- Performs this operation in an asynchronous method if possible.
- Stops the trigger execution if one of the created resources is crew members. This behavior is handled in a different flow.
- Updates or creates a calendar event based on the created resource.
- If the assigned resources' service statuses are either None or Canceled, this trigger changes their statuses to Assigned.

- If the created resources' service is a multi-day service appointment, this trigger checks if it's necessary to recalculate the service duration. If so, the trigger recalculates the length.
- If the travel trigger is enabled in the org, this trigger recalculates travel for all services scheduled on the same day as the services' start and end dates.
- Creates assigned resources for crew members. If the resource in the trigger is for the resource type crew, we create a single resource per crew member as well.
- Updates the ResourceCapacity object according to the resources' service appointments. If a service appointment is scheduled to a contractor, this trigger updates their capacity to reflect the actual scheduled working time and working items allocated.

Before Update:

- Fails the trigger if the created Assigned Resources record doesn't have a valid Service Territory Member assigned to them.
- Populates the ServiceCrewld field if the service resources are from type crew.

After Update:

- If the service appointment is a multi-day appointment, this trigger checks if there's a need to recalculate the service duration. If so, this trigger recalculates the length.
- Updates or creates a calendar event based on the assigned resources updated.
- Creates and deletes assigned resources based on the resources' updates. If an assigned resource in the trigger is for the service resource of type crew, we create a single assigned resource per crew member as well.
- Updates the Resource Capacity object according to the assigned resources' service appointments. If an assigned resource was scheduled to a contractor, we update their capacity to reflect the actual scheduled working time and working items allocated.
- If the Service Resource field was changed on the assigned resource update, this trigger removes old sharing and creates sharing according to the service resource's and the dispatcher's territories.
- If the Make assigned resources followers of service appointments that are Dispatched or In Progress setting is enabled in the settings page, and the respective service appointment Status Category field was updated, this trigger makes the updated assigned resources followers of the service appointments and parents.
- If the travel trigger is enabled in the org, this trigger recalculates travel for all services scheduled in the same day of the services' start and end dates.
- Updates the schedule mode according to the actual scheduling operation (that is, Optimization, Automatic, Manual).

Before Delete:

- Removes sharing from the delete assigned resources' service appointments.
- If the deleted assigned resource is a resource of the type crew, this trigger deletes the respective crew members appointment resources.

After Delete:

- If the travel trigger is enabled in the org, this trigger recalculates travel for all services scheduled in the same day of the deleted assigned resources' services' start and end dates.
- Updates the Resource Capacity object according to the deleted assigned resources' service appointments. If a service appointment was unscheduled from a contractor, update their capacity to reflect the actual scheduled working time and working items allocated.
- If the Make assigned resources followers of service appointments that are Dispatched or In Progress setting is enabled in the settings page, this trigger unfollows the deleted assigned resources' service appointments and service appointments' parents.
- Nullifies the deleted assigned resources' Service Appointments' scheduled start and end time, and changes the status to None.
- If one of two Follow Immediately chains were unscheduled, that is, the assigned resource got deleted, this trigger unschedules the respective service appointment in the chain. To learn more, see Schedule an Appointment That Immediately Follows Another.

Event

All triggers for this object are part of the Calendar Sync feature, which is described in Knowledge Article Number 000316720 in the Trailblazer Community.

Before Insert:

- Creates Resource Absences, Work Orders, Service Appointments, and Assigned Resources according to the settings described in Calendar Sync's Knowledge Article.
- Calendar Sync's settings are located in Field Service settings page. From the settings page, select Sharing > Calendar Sync.

After Update:

This file is called FSL__TR004_Event_BeforeUpdate but fires only after update.

- If one or more of the following fields has changed, this trigger updates the Salesforce records accordingly: Ownerld, Subject, Location, StartDateTime, EndDateTime.
- If FSL__Event_Type__c field has changed and the new value is valid, this trigger creates the Salesforce records accordingly.

After Delete:

This file is called FSL__TR004_Event_BeforeDelete but fires only after delete.

- If FSL_Event_Type__c field matches the 'Calendar Event type' setting of Service Appointment, and the service hasn't been updated, then this trigger deletes the Assigned Resource related to that service. This trigger unschedules the Service Appointment.
- If FSL__Event_Type__c field matches the 'Calendar Event type' setting of Resource Absence, then this trigger deletes the related absence.

Gantt Filter

After Insert:

• If the Make this filter available for all users checkbox is checked, this trigger creates a Share record for the FSL__Gantt_Filter__c and AllInternalUsers group.

After Update:

- If the Make this filter available for all users checkbox is unchecked in the update, then this trigger deletes its share record.
- If the checkbox is checked in the update, then this trigger adds a sharing record as described in After Insert.

Gantt Palette

After Insert:

• Add sharing to the AllInternalUsers group.

After Update:

• Add sharing to the AllInternalUsers group if no such sharing exists already.

Map Polygon

Before Insert:

• Sets the minimum and maximum Latitude and Longitude of the polygon to the designated fields.

Before Update:

Sets the minimum and maximum Latitude and Longitude of the polygon to the designated fields.

Operating Hours

Before Delete:

• Validates that the record deleted isn't the default operating hours in appointment booking settings. From the Field Service settings page, select **Global Actions** > **Appointment Booking**.

Optimization Request

Before Insert:

Sets the FSL__Text_Status__c text field with the value of the FSL__Status__c picklist field. The FSL__Text_Status__c is a text field
marked as an External ID and is used to improve query performance.

Before Update:

- Prevents the FSL_Status_c picklist field from changing from In Progress to Queued. This trigger returns the status to In Progress.
- Validates that a record with the FSL__Status__c value of Aborted doesn't change to Completed. If it does, this trigger prevents the change and throws an error.
- If the status is changed to Aborted, this trigger checks the following conditions:
 - The change wasn't caused by the optimization user.
 - The Optimization Request wasn't aborted by the auto-kill feature. That is, the feature that kills requests that stay in a specific status more than what's defined in the custom settings.
 - The user has Abort_Optimization_Request custom permission on their profile or one of their permission sets.

If all the previously mentioned criteria are met, the request is aborted.

Resource Absence

Before Insert:

- Changes the scale of the geolocation values (latitude and longitude) to 6 digits after the decimal point.
- Removes seconds and milliseconds from the resource absence DateTime fields.
- Fills the InternalSLRGeolocation fields (latitude and longitude) based on the geolocation values. The InternalSLRGeolocation fields
 are used in street-level routing and predictive route calculations.

After Insert:

- If the inserted resource absence is the type nonavailability then:
 - If a multi-day service appointment was affected by the resource absence and there's just one service appointment, this trigger
 updates its duration.
 - If Fix Overlaps is enabled in the org and Travel Trigger is disabled, this trigger calls Fix Overlaps.
 - If Travel Trigger is enabled in the org and no multi-day appointment was updated in step 1, this trigger recalculates travel for all services scheduled in the same day of the absences' start and end dates.
 - If the calendar sync feature is turned on then the trigger creates a calendar event for the resource absence.
- Otherwise, this trigger does nothing.

Before Update: (content is the same as Before Insert)

- Changes the scale of the geolocation values (latitude and longitude) to 6 digits after the decimal point.
- Removes seconds and milliseconds from the resource absence's DateTime fields.

• Fills the InternalSLRGeolocation fields (latitude and longitude) based on the geolocation values. The InternalSLRGeolocation fields are used in street-level routing and predictive routes' calculations. We don't check for a change in the geolocation values—we update them like in the Before Insert trigger.

After Update:

- If the updated resource absence is the type non availability then:
 - If a multi-day service appointment was affected by the resource absence change and there's just one service appointment, this trigger updates its duration.
 - If Fix Overlaps is enabled in the org and Travel Trigger is disabled, this trigger calls Fix Overlaps.
 - If Travel Trigger is enabled in the org and no multi-day appointment was updated in step 1, this trigger recalculates travel for all services scheduled in the same day of the absences' start and end dates.
 - If the calendar sync feature is turned on then the trigger creates a calendar event for the resource absence.
- Otherwise, this trigger does nothing.

Before Delete:

• Deletes the matching calendar event if it exists. See the Calendar Sync's Knowledge Article for more information.

After Delete:

- If the deleted resource absence is the type nonavailability then:
 - If a multi-day service appointment was affected by the resource absence deletion and there's just one service appointment, this
 trigger updates its duration.
 - If Fix Overlaps is enabled in the org and Travel Trigger is disabled, this trigger calls Fix Overlaps.
 - If Travel Trigger is enabled in the org and no multi-day appointment was updated in step 1, this trigger recalculates travel for all services scheduled in the same day of the absences' start and end dates.

Scheduling Policy

Before Insert:

- Validates that the Travel Mode checkbox is checked only when this feature is enabled in the org.
- Validates that In-Day Optimization is checked only when Enhanced Optimization is enabled in the org.

After Insert:

- Creates Earliest Start Time and Due Date basic time rules if they don't exist.
- Create the Scheduling Policy Work Rule junction object to assign these work rules to the inserted policy.

Before Update:

- Validates that the Travel Mode checkbox is checked only when this feature is enabled in the org.
- Validates that In-Day Optimization is checked only when Enhanced Optimization is enabled in the org.

Before Delete:

- Validate that the deleted record isn't the default scheduling policy for the appointment booking action.
- Validates that the Travel Mode checkbox is checked only when this feature is enabled in the org.
- Validates that In-Day Optimization is checked only when Enhanced Optimization is enabled in the org.
- Deletes the Earliest Start Time and Due Date'Scheduling Policy Work Rules junction objects.

Scheduling Policy Work Rule

Before Insert:

- Validates that there are no duplications. That is, validates that there's just one Scheduling Policy Work Rule record referencing a specific work rule in the same policy.
- Validates that there aren't more than two enhanced match rules in the same policy. If there are two, make sure they're referencing different Linking Objects.
- Validates that there aren't more than four Count Rules with Count Type of CustomValue.
- Validates that all Count Rule fields are valid.

Before Update:

Same as Before Insert.

Before Delete:

- Prevents the deletion of a Scheduling Policy Work Rule record related to Due Date and Earliest Start Time basic rules.
- If you delete the Scheduling Policy, it passes over this validation and deletes all related Scheduling Policy Work Rules.

Service Appointment

Before Insert:

- Remove seconds from the Service Appointment's DateTime fields.
- If there's a geolocation (latitude and longitude) on the created ServiceAppointment record, limit the decimal places after the decimal point to a maximum of 6 digits.
- If there's a geolocation (latitude and longitude) on the created ServiceAppointment record, populate the FSL__InternalSLRGeolocation__Longitude__s fields. These fields are used when calculating street-level routing routes.
- If the Derive the Service Appointment due date from its Work Type setting is enabled, this trigger derives the Duration field from the work order parent record and populates the Due Date field with the value of Earliest Start Permitted plus Due Date offset, which comes from the parent's work type field.
- If the Set your default service appointment duration to one hour setting is enabled, this trigger sets the service appointment duration to 1 hour if one of the following occurs:
 - 1. The duration field is null.
 - 2. The duration is shorter than 1 minute.

After Insert:

- If the Enable User Territories sharing setting is enabled, share the created service appointment with the service territory public group. This behavior provides sharing to the dispatchers who are part of the service appointment's territory.
- If the Enable User Territories sharing setting is enabled and the respective service appointment parent sharing setting is enabled,
 that is, Share parent Work Order when Service Appointment is shared, this trigger shares the created service appointment's parent
 with the service territory public group. This behavior provides sharing to the dispatchers who are part of the service appointment's
 territory.
- If the Derive the Service Appointment due date from its Work Type setting is enabled, this trigger derives the Duration field from the work order parent record and populates the Due Date field with the value of Earliest Start Permitted plus Due Date offset, which comes from the parent's work type field. This behavior is intentionally in both the Before Insert and the After Insert triggers.
- Schedules created service appointments in batches if they have the Auto Schedule field value set to true. The default policy, which is set in the Field Service settings page, is used when auto-scheduling service appointments upon creation.

- After the batch was invoked, the Auto Schedule flag is set to false automatically.
- If the Use polygons to assign service territories setting is enabled, this trigger auto populates the created service appointment's service territory field based on the service appointment's address and its match of a Map Polygon Service Territory field.
- If there's no match between the service appointment's address and the organization map polygons, the service territory field remains unchanged.

Before Update:

- Remove seconds from the service appointment's DateTime fields.
- If there's a geolocation (latitude and longitude) on the created ServiceAppointment record, this trigger limits the decimal places after the decimal point to a maximum of 6 digits.
- If Service Appointment Status Transitions are enabled in the Field Service settings page and there was a change in the service appointment status field, this trigger validates the status transition legality.
- If the updated service appointment's Status Category was changed to either Canceled or New, this trigger removes the Scheduled Start Time and Scheduled End Time field values.
- Prevents updating the Scheduled Start Time, Scheduled End Time, Latitude, and Longitude field values if the Is Pinned field value is set to true.
- If the service appointment is a multi-day service appointment, this trigger checks if there's a need to recalculate the service duration.

 If so, it recalculates the length.
- If the Drip-Feed feature is enabled in the settings page, this trigger dispatches the next service appointment in the day. This action is done in case the current service appointment status categories changed to Completed, Canceled or, Couldn't Complete. For more information, see Drip Feed Service Appointments in Salesforce Help.
- If the Mention assigned user when the Service Appointment is dispatched setting is enabled, mention the user upon service cancellation.
- Validates that the updated service appointment duration is longer than 1 minute. if the duration is null or 1 minute, change the duration to 1 hour.
- If there's a geolocation (latitude and longitude) on the updated service record and it has changed within the update, this trigger populates the FSL__InternalSLRGeolocation__Latitude__s, FSL__InternalSLRGeolocation__Longitude__s fields. Those fields are used when calculating street-level routing routes.
- If the FSL__Prevent_Geocoding_For_Chatter_Actions__c field is checked, this trigger disables Data.com's geolocation cleanup, which happens on address change, and returns the value of FSL__Prevent_Geocoding_For_Chatter_Actions__c field to false.
- If the Auto Schedule field on the updated service appointment record is set to true upon the service appointment's update process, this trigger prepares a set of service appointments that are called on the After Update trigger operation and sets the field to false.
- If the Use polygons to assign service territories setting is enabled and their geolocations fall within relevant Map Polygons records, this trigger classifies the updated service appointment territories based on a geographic area. For more information, see Create and Manage Map Polygons and Enable Map Polygons in Salesforce Help.

After Update:

- Shares the updated service appointments with the assigned resources if the status categories were changed to Dispatched. Shares with the service territory public groups if the service territories changed.
- Mentions the assigned resource user if the relevant setting is enabled.
- Performs this operation in an asynchronous method if not already in an async context.
- Creates and deletes Salesforce calendar events based on the service appointment status changes.
 - If the SA Status category changed from New/Scheduled to Dispatched, this trigger creates a calendar event.
 - If the service appointment status category changed from Dispatched to Scheduled/New, this trigger deletes the calendar event.

- If a service appointment assigned resource was changed and the service appointment remained dispatched, this trigger updates
 the relevant Salesforce calendar event accordingly.
- Updates the Resource Capacity object according to the service appointment change. If a service appointment was scheduled to a contractor, this trigger updates their capacity to reflect the actual scheduled working time and working items allocated.
- Schedules updated service appointments in batches if they have the Auto Schedule field value set to true. The default policy, which is set in the Field Service settings page, is used when auto-scheduling service appointments upon update.
- After the batch is invoked, the Auto Schedule flag is set to false automatically.
- If the Make assigned resources followers of service appointments that are Dispatched or In Progress setting is enabled in the settings page, and the Status Category field was updated, this trigger makes the assigned resources followers of the updated service appointments.
- If an updated service appointment is assigned to a Service Crew, this trigger creates/updates/deletes the service's assigned resources according to the newly updated service appointment to reflect the actual Service Crew scheduling. To learn more, see Considerations for Scheduling Service Crews in Salesforce Help.
- If the travel trigger is enabled in the org, this trigger recalculates travel for all services scheduled in the same day of the services' start and end dates.
- If the Scheduled Start and End Times of the updated service appointments are null but the service appointments have an assigned resource related to them, this trigger deletes the assigned resources.
- Updates the schedule mode according to the actual scheduling operation, that is, Optimization, Automatic, or Manual.
- Evaluates the scheduling recipes according to the actual service appointment update, that is, Canceled, Shortened, Late-end, or Emergency.
- To learn more, see Create Scheduling Recipes for Common Events in Salesforce Help.

Before Delete:

- Deletes the matching calendar event if it exists. See the Calendar Sync's Knowledge Article for more information.
- Deletes assigned resource records from the deleted service appointments.
- Remove sharing on the parent record, that is, the Work Order, from the territories' public groups.

Service Objective

Before Insert:

- Validates that the service objective has a record type.
- If the service objective is a custom logic objective, validates and decodes the Custom Logic Data (must be filled).

Before Update:

Same as Before Insert.

Service Resource

Before Insert:

- If the Efficiency field isn't empty, this trigger checks if its value is in the valid range (between 0.1–10). If not, this trigger prevents the insertion and shows an error next to the Efficiency field.
- If the ServiceCrewld field is empty, this trigger checks if there's another Service Resource record pointing to the same service crew. If so, the trigger throws an error and prevents the insertion.

After Insert:

• If location-based sharing is turned on in your org, this trigger creates a ServiceResourceShare object for the user specified in the RelatedRecordId field. If location-based sharing is turned off it, this trigger does nothing. If the RelatedRecordId field is empty for a specific record, for example, a Service Resource of type Crew, this trigger doesn't create a share object for the specific record.

Before Update:

- If the IsCapacityBased checkbox changed from false to true, this trigger validates there's only one service territory member, excluding secondary service territory members, linked to that resource. Otherwise, this trigger throws an error and prevents the update.
- If the Efficiency field isn't empty, this trigger checks if its value is in the valid range (between 0.1–10). If not, this trigger prevents the update and shows an error next to the Efficiency field.
- If the IsCapacityBased checkbox is checked, this trigger validates that this service resource doesn't have any Service Crew Member records. Otherwise, this trigger throws an error and prevents the update.
- If the ServiceCrewld field changed and the new value isn't empty, this trigger validates that there's no existing Service Resource record pointing to that Service Crew. Otherwise, this trigger throws an error and prevents the update.

After Update

• If the RelatedRecordId changed in the update and location-based sharing is turned on in your org, this trigger deletes all manual sharing records for the Service Resource, including those records created by the user, and creates a ServiceResourceShare object for the new related user. If it fails to delete one of the manual sharing objects this trigger doesn't delete any of them.

Service Resource Capacity

The trigger is named TR012_CapacityAfterUpdate but it fires only before insert and before update.

Before Insert:

- Validates that monthly capacities are defined in the first day of the month.
- Validates that capacities of the same duration type don't overlap each other, that is, they don't share a resource and date.
- Validates that Time Period and End Date fields are valid.
- Updates the MinutesUsed__c field according to the duration of services scheduled within the capacity.
- If CapacityInWorkItems field isn't empty, then this trigger updates the Work_Items_Allocated__c field with the number of services scheduled within the capacity.
- HoursInUse__c field is a formula field based on MinutesUsed__c. This field updates accordingly.
- Updates the Last Updated Epoch field with the number of milliseconds since January 1, 1970, 00:00:00 GMT.

Before Update:

- Validates that monthly capacities are defined in the first day of the month.
- Validates that capacities of the same duration type don't overlap, that is, they don't share a resource and date.
- Validates that Time Period and End Date fields are valid.
- Validates if one or more of the following fields have changed: TimePeriod, StartDate, CapacityInHours, CapacityInWorkItems, ServiceResourceld.
- If any of these fields have changed, this trigger updates the MinutesUsed__c field according to the duration of services scheduled within the capacity.
- If CapacityInWorkItems field isn't empty, then this trigger updates the Work_Items_Allocated__c field with the number of services scheduled within the capacity.
- HoursInUse_c field is a formula field based on MinutesUsed_c. This field updates accordingly.
- Updates the Last Updated Epoch field with the number of milliseconds since January 1, 1970, 00:00:00 GMT.

Service Resource Skill

Before Insert:

• Removes seconds and milliseconds from Effective Start Date and Effective End Date fields.

Before Update:

Same as Before Insert.

Service Territory

Before Insert:

- If the Enable Territory Name Duplicates custom setting is off (the default value is off), then this trigger makes sure there's no duplication in the names of the inserted territories.
- If the territory has a geolocation, then this trigger fills up the internal street-level routing geolocation values.

After Insert:

- If Enable User Territories sharing setting is enabled, this trigger creates a new public group with the name of the territory, if no such group exists, and creates a sharing record for that group.
- Adds the public group of the territory as a group member to the public group of the parent territory, if it has one.
- If the Enable Service Auto Classification custom setting is on (the default is on), this trigger sets the FSL__TerritoryLevel__c field according to the parent territory and top-level territory values of all territories. This field represents the level of the territory in the hierarchy and is used in the polygon's algorithm.

Before Update:

- If Enable Territory Name Duplicates custom setting is off (the default value is off) and the Name field has changed, then this trigger makes sure there's no duplication in the names of the updated territories.
- If the territory has a geolocation, then this trigger fills up the internal street-level routing geolocation values.

After Update:

- If name or owner fields changed, this trigger updates the public group of the territory accordingly.
- If Parent Territory field changed, this trigger updates the Parent Territory's public group and recalculate the FSL__TerritoryLevel__c field value to all records according to the new hierarchy.

Before Delete:

- Deletes the Service Territory's public group.
- Updates children territory's FSL__TerritoryLevel__c field according to the new hierarchy.

Service Territory Member

Before Insert:

- Removes seconds from the service territory member DateTime fields.
- Checks for date collisions. If a primary or relocation service territory member exists in the same date, the trigger fails.
- If a secondary service territory member exists in the same date and the created service territory member is in the same service territory, the trigger fails.
- If there's a geolocation (latitude and longitude) on the created service territory member record, this trigger populates the FSL__InternalSLRGeolocation__Longitude__s fields. Those fields are used when calculating street-level routing routes.

- Prevents creating service territory members of type Relocation to contractors.
- Prevents creating more than one service territory member, excluding Secondary service territory members, to contractors.

Before Update:

- Checks for date collisions. If a primary or relocation service territory member exists in the same date, the trigger fails.
- If a secondary service territory member exists in the same date and the created service territory member is in the same service territory, the trigger fails.
- If there's a geolocation (latitude and longitude) on the updated service territory member record, this trigger populates the FSL__InternalSLRGeolocation__Longitude__s fields. Those fields are used when calculating street-level routing routes.
- Prevents creating multiple service territory members of type Relocation or Primary to contractors.
- Prevents creating more than one service territory member (excluding Secondary service territory members) to contractors.

Skill Requirement

All triggers are empty.

Time Dependency

After Insert:

- Prevents creating duplicated dependencies between service appointments.
- Prevents adding an Immediately Follow dependency type to an already created time dependency chain.
- Adds service appointments to an existing chain according to the created Time Dependency. If needed, this trigger merges two chains according to the created Time Dependency.

Before Update:

- Prevents updating a Time Dependency if an existing Time Dependency has the same two service appointments.
- Prevents adding an Immediately Follow dependency type to an already created time dependency chain.

After Delete:

• Splits two dependencies according to the deleted Time Dependency. For example, if chain A contains SerA SerB SerC SerD SerE and the deleted Time Dependency is SerC SerD, this trigger splits the chain into two: SerA SerB SerC and SerD SerE.

Time Slot

Before Insert:

Removes seconds from DateTime fields.

Before Update:

Removes seconds from DateTime fields.

User Territory

Before Insert:

• If the Enable User Territories sharing setting is enabled, this trigger checks for uniqueness within all user territories. In other words, this trigger ensures that the same user isn't related to the same territory.

After Insert:

• If the Enable User Territories sharing setting is enabled, this trigger adds users to the respective public groups according to the created User Territory. Make the User Territory. Service Territory name the same as the public group name.

BeforeUpdate:

• If the Enable User Territories sharing setting is enabled, this trigger checks for uniqueness within all user territories. In other words, this trigger ensures that the same user isn't related to the same territory.

After Update:

• If the Enable User Territories sharing setting is enabled, this trigger adds and removes users to or from the respective public groups according to the updated user territory. For example, if a user territory is updated from User: David, Service Territory: Washington, this change results in removing David from the LA public group and adding him to the Washington public group.

After Delete:

• If the Enable User Territories sharing setting is enabled, this trigger removes users from the respective public groups according to the deleted user territory.

Work Order

Before Insert:

• If the Accountld field isn't empty and the VisitingHoursld field is empty, this trigger populates VisitingHoursld with the related account's operating hours ID.

Before Update:

- If the Accountld or VisitingHoursId fields changed, the Accountld field isn't empty, and the VisitingHoursId field is empty, this trigger
 populates VisitingHoursId with the related account's operating hours ID.
- If the FSL__Prevent_Geocoding_For_Chatter_Actions__c field is checked, this trigger disables Data.com's geolocation cleanup, which happens on an address change, and returns the value of FSL__Prevent_Geocoding_For_Chatter_Actions__c field to false.

Work Order Line Item

All triggers are empty.

Work Rule

Before Update:

- If the work rule is Availability Rule, this trigger prevents setting a minimum gap if the fixed gap checkbox is disabled.
- If the work rule is Availability Rule, this trigger prevents setting a break time if the Break And Travel trigger is disabled.
- If the work rule is Match Boolean Rule, this trigger prevents updating the work rule if the resource property field isn't populated.
- If the work rule is a Time Rule, this trigger prevents updating a time rule with Scheduled Start Time Equal To/Before Arrival Window Start/End.
- If the work rule is an Enhanced Match Rule or a Count Rule, this trigger prevents updating the rules with invalid field values.
- If basic time work rules don't exist in the org or are changed, this trigger creates valid basic time rules (Early Start Permitted & Due Date work rules).

Before Delete:

• Prevent deletion of the basic time work rules (Early Start Permitted & Due Date).

Field Service Code Examples

Use these code examples to get started working programmatically with Field Service features.

IN THIS SECTION:

Create a Service Report with Apex

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

Generate Work Orders on Maintenance Plans with Apex

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

Code Examples: Dispatcher Console Custom Actions

Learn how to configure Apex classes or Visualforce pages that you want to link to a custom action in the dispatcher console.

Create a Service Report with Apex

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

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



- This code example applies to API version 41.0 and later. Service reports generated with API version 40.0 can contain only one signature.
- This code example assumes that you have remote site settings enabled to make REST callouts. For more information, see Adding Remote Site Settings.
- The mock record ID in the code example is <code>OWOXX00000001E</code>. The mock service report template ID is <code>OSUR00000004DBFOA2</code>

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

```
String salesforceHost = System.Url.getSalesforceBaseURL().toExternalForm();
String url = salesforceHost + '/services/data/v41.0/actions/standard/createServiceReport';
// Create HTTP request
HttpRequest request = new HttpRequest();
request.setEndpoint(url);
request.setMethod('POST');
request.setHeader('Content-Type', 'application/json');
request.setHeader('Authorization', 'OAuth ' + UserInfo.getSessionId());
// Set the body as a JSON object
request.setBody('{"inputs" : [ {"entityId" : "OWOXX000000001E", "signatures" :
[{"data":"Base64 code for the captured signature
```

This is an example of a payload with two signatures.

```
"inputs":[
         "entityId": "0W0xx000000001E",
         "signatures":[
                "data": "Base64 code for the captured signature image",
                "contentType": "image/png",
                "name": "Customer Signature",
                "signatureType": "Customer",
                "place": "San Francisco",
                "signedBy":"John Doe",
                "signedDate": "Thu Jul 13 22:34:43 GMT 2017"
            },
            {
                "data": "Base64 code for the captured signature image",
                "contentType": "image/png",
                "name": "Technician Signature",
                "signatureType": "Technician"
            }
         ],
         "templateId": "OSLR00000004DBFOA2"
      }
  ]
}
```

Field Descriptions

- entityId—The ID of the work order, work order line item, or service report for which you want to create the service report.
- signatures—A list of JSON definitions for a digital signature.
 - data—(Required) The base64 code for an image.
 - contentType—(Required)The file type of the signature.
 - signatureType—(Required) The role of the person signing; for example, "Customer." Signature Type picklist values are defined by the Salesforce admin ahead of time. Each signature block must use a different signature type, and the signature types you define in your call must match the service report template's signature types.
 - name—The signature block title. This value appears on the generated service report.
 - place—The place of signing. This value appears on the generated service report.

- signedBy—The name of the person signing. This value appears on the generated service report.
- signedDate—The date of signing. This value appears on the generated service report.
- templateId—The ID of the service report template used for the report. To find the ID, run a SOQL query on the ServiceReportLayout object in Workbench.

SEE ALSO:

Salesforce Actions Developer Guide: Create Service Report Actions

Generate Work Orders on Maintenance Plans with Apex

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

You can use this code sample in several different ways:

- Add it to Apex controller code for an Aura component, and tie it to a custom UI or app functionality
- Use it in an Apex trigger to semi-automate the creation of the work orders (for example, whenever a maintenance plan is created or updated)
- Use it in an Apex REST service to create work orders when called from an external integration service

Note:

- This code sample assumes that you have remote site settings enabled to make REST callouts. For more information, see Adding Remote Site Settings.
- The mock maintenance plan ID in the code sample is 1MPR00000000Bu.
- This code sample references API version 45.0, but can be used with any version from 40.0 onward.

API Endpoint (v45.0): /services/data/v45.0/actions/standard/generateWorkOrders

```
String salesforceHost = System.Url.getSalesforceBaseURL().toExternalForm();
String url = salesforceHost + '/services/data/v45.0/actions/standard/generateWorkOrders';
// Create HTTP request
HttpRequest request = new HttpRequest();
request.setEndpoint(url);
request.setMethod('POST');
request.setHeader('Content-Type', 'application/json; charset=UTF-8');
request.setHeader('Authorization', 'OAuth ' + UserInfo.getSessionId());
// Set the body as a JSON object
request.setBody('{"inputs" : [{"recordId" : "1MPR00000000Bu"}]}');
Http http = new Http();
HttpResponse response = http.send(request);
// Parse the JSON response
if (response.getStatusCode() != 201) {
   System.debug('The status code returned was not expected: ' +
   response.getStatusCode() + ' ' + response.getStatus());
} else {
    System.debug(response.getBody());
}
```

SEE ALSO:

Salesforce Actions Developer Guide: Generate Work Orders Actions

Code Examples: Dispatcher Console Custom Actions

Learn how to configure Apex classes or Visualforce pages that you want to link to a custom action in the dispatcher console.

Custom actions can either call an Apex class or open a Visualforce page, and can be run on records in several areas of the dispatcher console. To learn how to create custom actions, see Create Custom Actions for the Dispatcher Console.



Note: All Apex classes implementing the quick action interfaces must be declared as Global to be accessible from the dispatcher console.

Creating Apex Classes

When you create an Apex class to link to a dispatcher console custom action, implement one of the following three interfaces in your class.

Interface	Description
CustomGanttServiceResourceAction	For actions on service resources. The parameters are the service resource record ID, the service territory member record ID reflected on the Gantt, and the start and end dates of the current Gantt view. No additional parameters are included. Use the following format: String action (Id resourceId, Id stmId, Datetime strGanttStartDate, Datetime strGanttEndDate, Map <string, object=""> additionalParameters)</string,>
CustomGanttServiceAppointmentAction	For actions on service appointments. The parameters are the service appointment record IDs—used for bulk actions—and the start and end dates of the current Gantt view. No additional parameters are included. The Map <string, object=""> additionalParameters input parameter is reserved for future use but must be included to run the code. Use the following format: String action (List<id> serviceAppointmentsIds, Datetime strGanttStartDate, Datetime strGanttEndDate, Map<string, object=""> additionalParameters)</string,></id></string,>
	When this action is implemented, multiple service appointments can be returned. In your method, we recommend creating an if statement to check how many IDs are returned. First, validate that at least one ID was returned: serviceAppointmentsIds.size()>1. Then, you can take different actions depending on whether 0, 1, or more appointment IDs were returned.
CustomGanttResourceAbsenceAction	For actions on resource absences. The parameters are the resource absence record ID, the absence type ('na' or 'break'), and the start and end dates of the current Gantt view. No additional parameters are included. The Map <string, object=""></string,>

Interface	Description
	additionalParameters input parameter is reserved for future use but must be included to run the code.
	Use the following format: String action (Id absenceId, String absenceType, Datetime strGanttStartDate, Datetime strGanttEndDate, Map <string, object=""> additionalParameters)</string,>

These functions must be global and require that a string be returned. If the string isn't empty, it is used in the Gantt notification shown when a user clicks the related action.

Code Example: Service Resource Custom Action

This action creates a resource absence of type Non Availability for the selected service resource that spans the days visible on the Gantt.

```
global class BlockResourceVisibleTime implements FSL.CustomGanttServiceResourceAction {
   global String action(Id resourceId, Id stmId, Datetime ganttStartDate, Datetime
qanttEndDate, Map<String, Object> additionalParameters) {
        ResourceAbsence na = new ResourceAbsence();
        // get Resource Absence record type - NA
        RecordType recordTypeNA = [
           SELECT
               Id, SobjectType, Name
            FROM
                RecordType
            WHERE
               DeveloperName =: 'Non Availability'
                SObjectType =: ResourceAbsence.getSobjectType().getDescribe().getName()
            ];
       na.RecordTypeId = recordTypeNA.Id;
        na.ResourceId = resourceId;
        na.FSL Approved c = true;
       na.Start = ganttStartDate;
       na.End = ganttEndDate;
       insert na;
      ServiceResource resource = [SELECT Name FROM ServiceResource WHERE Id =: resourceId];
        return 'Blocked availability to ' + resource.Name + ' from ' +
ganttStartDate.format() + ' to ' + ganttEndDate.format();
```

Code Example: Service Appointment Custom Action

This action toggles the In Jeopardy field between True and False.

```
global class toggleServiceAppointmentJeopardy implements
FSL.CustomGanttServiceAppointmentAction {
   global String action(List<Id>> serviceAppointmentsIds, Datetime ganttStartDate, Datetime
ganttEndDate, Map<String, Object> additionalParameters) {
        List<ServiceAppointment> saList = [SELECT FSL InJeopardy c, AppointmentNumber
FROM ServiceAppointment WHERE Id in : serviceAppointmentsIds];
        String reply = '';
        List<String> saNames = new List<String>();
        for (ServiceAppointment s : saList) {
            s.FSL InJeopardy c = !s.FSL InJeopardy c;
            saNames.add(s.AppointmentNumber);
       upsert saList;
       reply = String.join(saNames, ', ');
        return 'Service Appointments successfully processed: ' + reply;
    }
}
```

Code Example: Resource Absence Custom Action

For resource absences of type NA, this action creates a duplicate absence on the following day.

```
global class copyAbsenceToNextDay implements FSL.CustomGanttResourceAbsenceAction {
    global String action(Id absenceId, String absenceType, Datetime ganttStartDate, Datetime
    ganttEndDate, Map<String, Object> additionalParameters) {
        ResourceAbsence resourceAbsence = [SELECT Id, AbsenceNumber, Start, End, ResourceId,
        RecordTypeId, FSL_Approved_c FROM ResourceAbsence WHERE Id =: absenceId LIMIT 1];

        ResourceAbsence raClone = resourceAbsence.clone(false, true, false, false);
        raClone.Start = resourceAbsence.Start.addDays(1);
        raClone.End = resourceAbsence.End.addDays(1);
        raClone.ResourceId = resourceAbsence.ResourceId;
        raClone.RecordTypeId = resourceAbsence.RecordTypeId;
        raClone.FSL_Approved_c = true;
        insert raClone;

        return 'Resource Absence successfully copied.';
}
```

Creating Visualforce Pages

When you create a Visualforce page, use the following GET parameters.

For actions on	Description
Service appointments	Use the following format: services [if multiple], id (comma delimited if multiple), start (current Gantt start date, string), end (current Gantt end date, string)
	Example for a Visualforce page used to update a single service appointment: ?id=08p4E000000Kj5hQAC& start=5-7-2018&end=5-8-2018
	Example for a Visualforce page used to update multiple service appointments: ?services=08p4E000000Kj5hQAC,08p4E000430Kj5hAPP& start=5-7-2018&end=5-8-2018
Service resources	Use the following format: id, stm (ID of service resource's current service territory member record), start (current Gantt start date, string), end (current Gantt end date, string)
	Example: ?id=0Hn4E0000001OMQSA2& stm=0Hu4E0000005cpPSAQ&start=5-7-2018& end=5-8-2018
Resource absences	Use the following format: id, type ('break' or 'na'), start (current Gantt start date, string), end (current Gantt end date, string)
	Example: ?id=0Hw4E00000091HSSAY& type=break&start=5-7-2018&end=5-8-2018

To close the Visualforce lightbox from your code, use: parent.postMessage('closeLightbox','*');



Note: Custom dispatcher console actions can't open Visualforce pages that are part of a managed package.

SEE ALSO:

Create Custom Actions for the Dispatcher Console

Field Service Mobile App

Configure mobile-specific features, such as deep linking, for the Field Service app.

IN THIS SECTION:

Configure Deep Linking for the Field Service Mobile App

Your field technicians rely on their mobile devices to perform complex tasks, and some of those tasks require them to navigate between multiple tabs, flows, or actions. With deep linking, you can send users directly to the right spot in the app.

Configure Deep Linking for the Field Service Mobile App

Your field technicians rely on their mobile devices to perform complex tasks, and some of those tasks require them to navigate between multiple tabs, flows, or actions. With deep linking, you can send users directly to the right spot in the app.

Deep linking enables mobile apps to interact with each other using links called URIs, or Uniform Resource Identifiers. URIs have the power to point users to a specific location in a mobile app. Field Service has a pre-defined URI scheme that allows users to launch the Field Service app from a link in an email, website, or third-party application. An administrator or developer can create custom URIs to display specific tabs in the Field Service app. For example, you could integrate a third-party app that your field technicians use for billing.

If an unauthenticated user taps on a Field Service URI, they will be taken to the login screen. Once they log in, they need to tap the URI again to view the linked page.

IN THIS SECTION:

Deep Linking Schema for the Field Service Mobile App

Use the predefined URI schema for the Field Service mobile app on both Android and iOS devices.

Deep Linking Schema for the Field Service Mobile App

Use the predefined URI schema for the Field Service mobile app on both Android and iOS devices.

URI Schema Format

<com.salesforce.fieldservice>://v1/s0bject/<id>/<action>

Let's break down each parameter of the URI scheme format.

- com.salesforce.fieldservice—The supported Salesforce schema name.
- v1—The current version of deep linking. This is a static value.
- sObject—Indicates a single instance of a Salesforce object. The schema supports all object types that are supported in the Field Service app, such as work order, service appointment, and assets.
- id—The unique single instance of a Salesforce object. id lengths of 15 and 18 characters are supported.
- action—A supported URI schema operation. Valid actions are listed in the Supported URI Schemes section. If no action is specified, URIs for work orders and service appointments direct to the Overview tab. URIs for any other object type direct to the Details tab.
- api_name—Some deep links require an API name in order to perform their function. For instance, the quick action URI requires a quick action API name, and the flow URI requires a flow API name.

Supported URI Schemes

com.salesforce.fieldservice://v1/s0bject/<id>

Links to the Overview tab for work orders and service appointments. Links to the Details tab for all other object types. When linking to a work order with multiple service appointments, the first service appointment in the related list is used in the work order Overview tab.

Example: com.salesforce.fieldservice://v1/sObject/0WO5500000001UZGAA

This example links to the Overview tab for a work order.

com.salesforce.fieldservice://v1/s0bject/<id>/details

Links to the Details tab for all object types.

Example: com.salesforce.fieldservice://v1/sObject/0W0550000001UZGAA/details

This example links to the Details tab for a work order.

com.salesforce.fieldservice://v1/s0bject/<id>/related

Links to the Related tab for all object types.

Example: com.salesforce.fieldservice://v1/s0bject/0W0550000001UZGAA/related

This example links to the Related tab for a work order.

com.salesforce.fieldservice://v1/s0bject/<id>/products

Links to the Products tab for all applicable object types. If an object doesn't have a Products tab, it links to the Details tab instead.

Example: com.salesforce.fieldservice://v1/s0bject/0W05500000001UZGAA/products

This example links to the Products tab for a work order.

com.salesforce.fieldservice://v1/s0bject/<id>/feed

Links to the Feed tab for all applicable object types. If an object doesn't have a Feed tab, it links to the Details tab instead.

Example: com.salesforce.fieldservice://v1/sObject/0W0550000001UZGAA/feed

This example links to the Feed tab for a work order.

com.salesforce.fieldservice://v1/s0bject/<id>/location

Links to the Location tab for all applicable object types. If an object doesn't have a Location tab, it links to the Details tab instead.

Example: com.salesforce.fieldservice://v1/s0bject/0W0550000001UZGAA/location

This example links to the Location tab for a work order.

com.salesforce.fieldservice://v1/s0bject/<id>/edit

Links to the edit page for the specified Salesforce record.

Example:

com.salesforce.fieldservice://v1/sObject/0WO550000001UZGAA/edit?Subject=Example%20Subject

This example links to the edit page for this record and fills the "Subject" field with the "Example Subject" value.

com.salesforce.fieldservice://v1/s0bject/<id>/createservicereport

Creates a service report for a particular work order or service appointment. The <id> value must specify a work order or service appointment record.

Example: com.salesforce.fieldservice://v1/s0bject/0W0550000001UZGAA/createservicereport

This example creates a service report for the work order or service appointment.

com.salesforce.fieldservice://v1/sObject/<id>/flow/<api name>

Launches a Field Service Mobile Flow from within the mobile app. For example, you can use this URL to launch a custom service closure flow. To use this feature, the app extension must reference this flow. You can find the extension in Setup under **Field Service Mobile Settings**. Verify that an extension in the **App Extensions** section includes this flow. To learn more, see Connect a Flow to the Field Service Mobile App. Use the URL-encoded name of the extension in the URI.

Example:

cam.salesforce.fieldservice://v1/s0bject/0W05500000001UZCAA/flow/service response flow?Subject=Example%20Subject

This example launches the "service response flow" flow passing in "Example Subject" as the value for the "Subject" input variable.

com.salesforce.fieldservice://v1/sObject/<id>/quickaction/<api name>

Launches a quick action from within the mobile app. The following quick action types are supported: Create a Record, Update a Record, and Field Service Mobile Extension. You can pass inputs into the quick action using parameters on this URL.

Example:

 ${\tt com.sales force.field service://v1/sObject/0WO5500000001UZGAA/quick action/close_order. This example launches the "close order" quick action.}$

Parameter Passing for Deep Linking

To pass parameters in a deep linking schema such as a quick action or flow URL, the following parameter types are valid.

- URL-encoded text parameters; for example, Short \$20 text \$20 input
- Numbers or currency; for example, 1 or 1.45
- Boolean values; for example, true or false. These values aren't case-sensitive. If no parameter is passed, the default is false.
- URL-encoded date and dateTime parameters; for example, 2019–12–11T17%3A01%3A00.000%2B0000. Include a URL-encoded timezone, such as +0000 (GMT) or -0400 (AST).

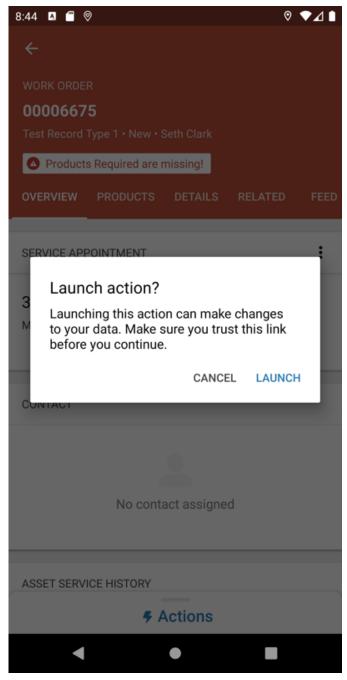
Other parameters aren't supported in deep linking URI schema.

To pass more than one parameter, use an ampersand (&) between them; for example, firstname=John&lastname=Doe.

We don't limit the number of parameters, and each parameter value can contain up to 100,000 characters. While deep links can encode up to 1 MB, it's best practice to encode smaller amounts of data.

Hide Deep Linking Security Dialog

Each time a user opens a deep link to an action from the Field Service mobile app, a "Launch action" security dialog prompts the user to confirm the action. You can hide this dialog by configuring the deep link URL with a security key.



Complete the following steps to configure the security key.

Step 1: Create a private and public key

1. In the terminal, run these commands to create a private and public key. The .pem key files are created in the folder where you execute the commands.

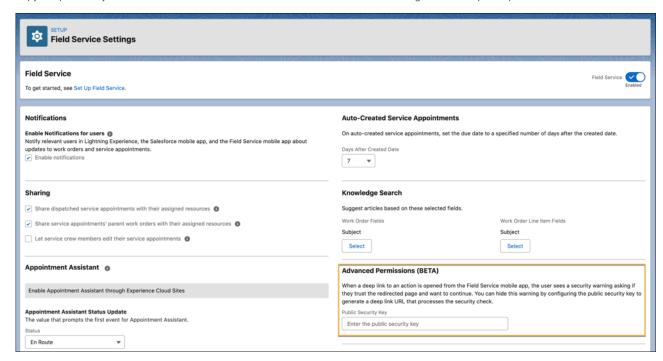
```
openssl ecparam -genkey -name prime256v1 -noout -out private.pem openssl ec -in private.pem -pubout -out public.pem
```

2. Keep a copy of the private.pem and public.pem files so that you can sign URLs in the future without generating new key pairs. The private.pem file contains the security key.

3. Open the public.pem file and copy the public key excluding the header and footer. This is a sample public key.

```
MFkwEwYHKoZIzj0CAQYIKoZIzj0DAQcDQgAEkvkDcFieJenYABN8wOLlE2VomNt2
9/tcTyj+B06ZndRkTjs7+XwrjHe/wOZvjkdYvewhIByLI6uDTYZixDhO1A==
```

4. Copy the public key into the Advanced Permissions section of the Field Service Settings UI. This step is required to turn on this feature.



Step 2: Sign the deep link URL

- 1. In the terminal, change directories to the folder containing the private.pem file.
- 2. Generate the deep link URL, and copy it to your clipboard.

```
// Base URL.
com.salesforce.fieldservice://v1/s0bject/<id>//action>

// URL with additional query parameters.
com.salesforce.fieldservice://v1/sobject/<id>//action>?param1=value1&param1=value2
```

3. To create a signature using the private key, run this command. This creates a signature using OpenSSL and Base64 encoding.

pbpaste reads the deep link URL that you copied from the previous step and pbcopy copies the output signature into your clipboard.

```
pbpaste | openssl dgst -sha256 -sign private.pem | openssl base64 | tr '/+' '_-' | tr -d '=' | tr -d '\n' | pbcopy
```

4. Sign the deep link URL by adding the query parameter __signature=<sig> to the end of the URL. Replace <sig> with the signature, which you can paste from your clipboard. If you have additional query parameters, place the signature parameter after them.

```
// Signed URL.
com.salesforce.fieldservice://v1/s0bject/<id>//action>?__signature=<sig>
```

```
// Signed URL with additional query parameters. com.salesforce.fieldservice://v1/sobject/<id>//action>?param1=value1&param1=value2&_signature=<sig>
```

Now you can send the deep link URL with the signature as before. When the technician clicks the URL, the deep link opens in the Field Service app. The app verifies the signature using the public key. If the public key hash matches, the URL is loaded without the "Launch action" dialog. If the public key hash doesn't match, the user must confirm the action.

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