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FIELD SERVICE

Field Service (formerly known as Field Service Lightning) gives you a powerful, highly customizable, mobile-friendly field service hub in Salesforce.

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

• Create records that represent your field service workers, dispatchers, and agents, and add details about their skills, location, and availability
• Set up multilevel service territories that represent the regions where mobile workers can provide services
• Track the location and status of your inventory, warehouses, service vehicles, and customer sites
• Schedule one-time or recurring work orders for customers, and add details about worker preferences, required skills, and parts
• Create maintenance plans and templates to standardize your field service tasks
• Generate service reports to keep customers informed about service progress

What’s Included in Field Service

Core Features
When Field Service is enabled, you gain access to a suite of standard objects that you can find in Setup and as tabs in Salesforce. These objects make up the core Field Service features, including work orders and service appointments.

Managed Package
The Field Service managed package builds on the core features and includes:

• A Guided Setup tool that walks you through creating Field Service records and customizing your settings
• A dynamic scheduling console that gives dispatchers and supervisors a bird’s-eye view of all team members and scheduled appointments
• A scheduling optimizer that allocates resources to appointments in the most efficient way possible by accounting for worker skill level, travel time, location, and other factors
• Scheduling policies and triggers that help you customize your scheduling model and display preferences

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

Field Service APIs and Developer Resources
Ready to get started developing with Field Service? Check out the Field Service Developer Guide for object relationship diagrams, API reference information, and code samples.
Welcome to the Field Service Learning Map

The Field Service learning map is a centralized, useful resource to guide you on the road to Field Service success. Visit the Field Service learning map (English only).

Whether you’re just starting with Field Service or you’re an experienced admin looking to add the latest features, you can find curated links to documentation, blogs, Trailhead modules, and other resources.

![Field Service Learning Map](image)

The map directs you to resources for five key steps in the Field Service journey:

1. Discover Field Service and learn how it can help you.
2. Build Field Service with steps that consider setup dependencies.
3. Customize Field Service to meet the needs of your team.
4. Optimize your schedule to save time and money.
5. Monitor and troubleshoot Field Service issues.

When do I use the learning map and success center?

The learning map groups resources a bit differently than the Success Center for Field Service. By giving you a sequential series of steps to implement Field Service, the learning map helps you avoid setup snags and issues. After you get to know your way around Field
Service, use the success center to access key topics and information. Both the learning map and success center feature links to other deep-dive resources such as Salesforce community groups and events.

Note: For usage restrictions that apply to this product, see this document.

IN THIS SECTION:

Field Service Limits and Limitations
Learn about Field Service limits and limitations.

Set Up Field Service
Build and manage your field service operation in one place. Create records representing your workforce, set up work order tracking and inventory management, and customize the Field Service mobile app to set up your mobile workforce for success.

Manage Work Orders for Field Service
Work orders, which track work to be performed for customers, are the heart of Field Service. Learn how to create and customize work orders and maintenance plans.

Manage Shifts
Shifts in Field Service let you define variable working periods for your shift-based workforce, such as contractors or on-call staff. Create shifts for particular dates and times when you need coverage, and assign them to service resources. When the managed package is installed, scheduling and optimization consider workforce availability during shifts.

Manage Service Resources
Service resources are mobile workers that can be assigned to service appointments. Learn how to create time sheets and view a service resource’s travel routes and calendar.

Manage Service Crew Membership
Efficiently manage your service crews to accommodate a fast-changing field service schedule. Create crews, find and add members with the right skills, adjust membership dates to match appointment times, and view all crews’ schedules and members in one place.

Manage Service Appointments
Learn how to create, schedule, reschedule, and unschedule service appointments. Tighten up your schedule by fixing overlaps, grouping nearby appointments, and filling schedule gaps.

Manage Your Field Service Inventory
Stay on top of the movement of inventory in your field service operation. Learn how to request and transfer products, track consumption, and process customer returns.

Manage Service Reports
Make your customers happy with service reports delivered to their in-boxes. Mobile workers and dispatchers can create reports for work orders, work order line items, or service appointments and email them directly to the customer. Use standard templates or create variations of your own.

Optimize Your Field Service Schedule
Use schedule optimization to formulate the optimal schedule for your team and customers. Schedule optimization helps you comply with service-level agreements and minimize travel time, overtime, costs, and no-shows.

Work in the Dispatcher Console
The Field Service dispatcher console is the main working space for dispatchers. It features a dynamic map and a highly customizable Gantt chart showing upcoming appointments, active team members, and more. To reach the dispatcher console, from the App Launcher, find and open the Field Service app, and then click the Field Service tab.

Field Service Object Fields
Learn about the fields available on Field Service standard objects.
# Field Service Limits and Limitations

Learn about Field Service limits and limitations.

⚠️ **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.

To review Field Service mobile app limitations, see Field Service Mobile App Considerations.

## General Limits

<table>
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<tr>
<th>Limit</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum number of service resources per user</td>
<td>1</td>
</tr>
<tr>
<td>Maximum number of service territories in a service territory hierarchy</td>
<td>10,000</td>
</tr>
<tr>
<td>Maximum number of work orders in a work order hierarchy</td>
<td>10,000</td>
</tr>
<tr>
<td>Maximum number of work order line items in a work order line item hierarchy</td>
<td>10,000</td>
</tr>
<tr>
<td>Maximum number of maintenance work rules per maintenance plan</td>
<td>25,000</td>
</tr>
</tbody>
</table>
| Maximum number of work orders that can be generated simultaneously per maintenance plan | 2,600 Field service can create a combined total of up to 2,600 work order records each time it generates details for a maintenance plan. There’s no hard limit on the number of maintenance assets that you can attach to a maintenance plan. But the limit on the number of work orders records that can be created means that the practical limit is 2,600 maintenance assets per maintenance plan. When maintenance assets have multiple maintenance rules—either applied directly or inherited from the maintenance plan—the practical number of maintenance assets is lower. Each maintenance work rule can generate work order and work order line item records. For example:  
  • If every maintenance asset for a maintenance plan contains two maintenance work rules, the practical limit on maintenance assets is less than 1,300. |
A maintenance plan has four maintenance work rules, the practical limit on maintenance assets is less than 650. Also, a maintenance plan with a maintenance work rule using COUNT is limited to 2,000 maintenance assets. Salesforce recommends that you add no more than 5 maintenance work rules to each maintenance plan or asset.

**Note:** Tip To decrease the number of work orders generated, increase the Frequency value, decrease the Generation Timeframe value, or decrease the number of assets related to the maintenance plan.

<table>
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<th>Limit</th>
<th>Details</th>
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<tr>
<td>Maximum number of locations in a location hierarchy</td>
<td>10,000</td>
</tr>
<tr>
<td>Maximum number of signature blocks on a service report template</td>
<td>20</td>
</tr>
<tr>
<td>Maximum number of values in the Signature Type picklist on digital signatures</td>
<td>1,000</td>
</tr>
<tr>
<td>Maximum number of child assets per asset</td>
<td>2,000</td>
</tr>
<tr>
<td>Maximum number of levels in an asset hierarchy</td>
<td>50</td>
</tr>
<tr>
<td>Maximum number of assets in an asset hierarchy</td>
<td>10,000</td>
</tr>
<tr>
<td>Maximum size of asset hierarchies that can be viewed in the tree grid view</td>
<td>500</td>
</tr>
<tr>
<td>Maximum number of appointments that can be scheduled at once with the Group Nearby Appointments action</td>
<td>50</td>
</tr>
<tr>
<td>Maximum runtime in seconds for the Group Nearby Appointments action</td>
<td>60</td>
</tr>
<tr>
<td>Maximum number of coordinates in a map polygon</td>
<td>3,200</td>
</tr>
<tr>
<td>(Recommended) Maximum number of polygons in an org</td>
<td>30,000</td>
</tr>
<tr>
<td>Maximum number of report markers on the Gantt map</td>
<td>500</td>
</tr>
<tr>
<td>Maximum number of rows on the Gantt</td>
<td>500</td>
</tr>
<tr>
<td>Maximum number of service appointments in the appointment list</td>
<td>3,000</td>
</tr>
<tr>
<td>Maximum number of service appointment sharing records that can be processed when updating service appointment statuses in bulk</td>
<td>50,000</td>
</tr>
</tbody>
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### Field Service Limits and Limitations

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<th>Limit</th>
<th>Details</th>
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</thead>
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<tr>
<td>Maximum number of skills displayed in the Gantt Skills filter panel</td>
<td>2,000</td>
</tr>
<tr>
<td>Maximum number of skills considered per service resource during a</td>
<td>50</td>
</tr>
<tr>
<td>Gantt skill filter operation</td>
<td>When the Gantt's resource skill filter runs, only 50 skills are considered for each service resource. This means that service resources with more than 50 skills may not appear when you filter for a skill that they possess. This limit applies only to the Gantt resource skill filter; the Candidates action finds all resources with the skills you need.</td>
</tr>
<tr>
<td>Maximum number of operating hours records displayed in the</td>
<td>2,000</td>
</tr>
<tr>
<td>Default Operating Hours lookup field on the Global Actions &gt;</td>
<td></td>
</tr>
<tr>
<td>Appointment Booking settings page</td>
<td></td>
</tr>
<tr>
<td>Maximum number of service appointments displayed in the Long-Term</td>
<td>1,000</td>
</tr>
<tr>
<td>view in the Gantt</td>
<td></td>
</tr>
<tr>
<td>Maximum number of resource absences displayed in the Long-Term view</td>
<td>200</td>
</tr>
<tr>
<td>in the Gantt</td>
<td></td>
</tr>
<tr>
<td>Maximum number of active scheduling recipes per category</td>
<td>75</td>
</tr>
<tr>
<td>Maximum number of active scheduling recipes per org</td>
<td>1,000</td>
</tr>
<tr>
<td>Maximum number of service territories that can be viewed without</td>
<td>2,000</td>
</tr>
<tr>
<td>searching</td>
<td></td>
</tr>
<tr>
<td>Minimum screen resolution for a smooth dispatcher console experience</td>
<td>1366 x 768 pixels (minimum)</td>
</tr>
<tr>
<td></td>
<td>1920 x 1080 pixels (recommended)</td>
</tr>
</tbody>
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### Schedule Optimization Request Limits

<table>
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<th>Limit</th>
<th>Details</th>
</tr>
</thead>
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<tr>
<td>Maximum optimization requests per hour per org</td>
<td>3,600</td>
</tr>
<tr>
<td>Maximum service appointments optimized per rolling 24 hours</td>
<td>50,000</td>
</tr>
<tr>
<td>Maximum service appointments optimized per request</td>
<td>5,000</td>
</tr>
<tr>
<td>Maximum service territories optimized in a request</td>
<td>100</td>
</tr>
<tr>
<td>Maximum service resources optimized per request</td>
<td>500</td>
</tr>
<tr>
<td>Maximum days optimized per request</td>
<td>21</td>
</tr>
<tr>
<td>Maximum number of objects passed to the optimization service in 1</td>
<td>45,000</td>
</tr>
<tr>
<td>request (for example, service appointments + related objects such as</td>
<td></td>
</tr>
<tr>
<td>skill requirements and assigned resources)</td>
<td></td>
</tr>
</tbody>
</table>
Field Service

Limit

Maximum number of objects returned synchronously for In-day optimization (more objects are returned asynchronously) | 1,000

**Note:** For usage restrictions that apply to this product, see this document.

### Limitations

#### Dispatcher Console
- Service appointments without assigned resources appear on the appointment list but not on the Gantt.
- Territory utilization calculation doesn’t consider secondary territory members.
- The dispatcher console map can look different than the map shown on service territory member detail pages because of a difference in geocoding granularity. The dispatcher console map tends to be more accurate.
- Because Google Maps is restricted in China, Field Service features that depend on Google Maps don’t work there. To minimize errors and customize access for users in China, see Disable Google Maps-based Field Service features for China users.
- If a service resource has more than 23 stops in a period of 24 hours (including starting point, ending point, appointments, and absences), the resource map shows only the first 23 stops on the route and displays an error. This is a Directions API limitation.

#### Inventory Management
- Workers using the Field Service mobile app can consume—via the Products Consumed related list—only one serialized product item per product per work order. This limitation doesn’t apply to nonmobile platforms.
- The Location field on serialized product items can’t be updated manually. The location auto-updates if a related product transfer is marked received. To enable serialized product transfers (a beta feature), contact Salesforce.

#### Linked Articles
Linked articles are knowledge articles attached to a work order, work order line item, or work type. They have the following limitations.
- Quick actions and global actions aren’t supported for linked articles.
- The Article widget and Feed Articles Tool aren’t available in the feed view.
- In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic. In the Salesforce mobile app, linked articles can’t be accessed from feed items.
- The Linked Work Types related list isn’t available on articles in any platform.
- The Knowledge One widget isn’t available on work types in the console. To manage linked articles on work types in the console, use the Articles related list.
- Linked articles are read-only in the Salesforce mobile app.

#### Multiday Scheduling
With multiday scheduling, you schedule service appointments that span multiple days. It includes the following limitations.
- A service resource can’t be assigned to any other appointment during a multiday service appointment.
- Multiday service appointments that overlap with other appointments don’t trigger the Fix Overlaps action.
- Multiday service appointments can’t be assigned to capacity-based service resources.
- Multiday service appointments can’t span more than 8 weeks.
- If a multiday service appointment has a scheduling dependency, its Scheduled End date isn’t calculated when the appointment is scheduled. For this reason, we recommend against creating dependencies between multiday appointments.
Operating Hours

- You can’t create a master-detail relationship between a custom object and Time Slot where Time Slot is the master object.
- Operating hours can’t span a full 24 hours. Instead, use the operating hours 00:00–23:58.
- Operating hours for secondary service territory memberships must be identical to or contained within the resource’s primary territory membership’s hours.
- Multiple time slots aren’t supported for secondary STM operating hours.

Salesforce App

Most Field Service features are available in all versions of the Salesforce mobile app. Be aware of these mobile app limitations.

- In Salesforce for iOS:
  - You can’t create service appointments, and the Recent related list isn’t available.
  - You can’t create service resources or absences, and the Recent related list isn’t available on service resources or absences.
- On field service records created via a related list, the field that lists the parent record doesn’t populate until you save the record. This issue applies to all versions of the Salesforce mobile app. For example, when you create a service appointment from the Service Appointments related list on a work order, the Parent Record field is blank until you tap Save. After you create the record, the parent record field lists the parent work order.
- If the Created Date or Last Modified Date fields are in the future, creating or updating records can cause an error when working offline with the offline sync permission disabled.
- The dispatcher console—a Field Service managed package feature—isn’t available in the Salesforce mobile app.
- The Linked Work Orders and Linked Work Order Line Items related lists on articles aren’t available.
- Linked articles are read-only. You can search the Knowledge base and read attached articles, but you can’t attach or detach articles. To manage linked article settings and attach or detach articles, use the desktop site.
- Linked articles can’t be accessed from feed items.

Salesforce on iPad Safari

- Creating service reports from work orders or service appointments isn’t supported on Lightning Experience on iPad Safari.
- The dispatcher console isn’t supported on iPad Safari. We recommend that you use Lightning Experience on a desktop to use the dispatcher console.

Scheduling and Optimization

- A scheduling policy can contain up to five Match Boolean work rules.
- The Gantt and Appointment Booking features can retrieve up to 2,000 security policies.
- Match Fields work rules aren’t supported for schedule optimization.
- If the Emergency Chatter action is used for an appointment with a scheduling dependency, the dependency isn’t considered during scheduling.
- Schedule optimization is supported only for service appointments whose parent record is a work order or work order line item.
- Schedule optimization is supported only for service territories with at least one primary territory member.
- Optimization requests that include a service resource’s secondary territory memberships must also include the corresponding primary territory membership.
- Only active territories included in the scheduled optimization job are optimized.
- If a service appointment doesn’t include an address, the scheduling optimizer assumes that the appointment is at the assigned resource’s home base.
- Global and In-day optimization validate that for already scheduled service appointments, the Scheduled End - Scheduled Start time = Duration, while taking resource efficiency into consideration. Service appointments that violate this are unscheduled.
• If a multiday service appointment has a scheduling dependency, its Scheduled End date isn’t calculated when the appointment is scheduled. For this reason, we recommend against creating dependencies between multiday appointments.

• If you drag and drop a multiday service appointment, or manually change its Scheduled Start, the Scheduled End doesn’t go beyond the due date regardless of the appointment Duration.

• Resource schedule optimization has the following limitations and considerations.
  – Under Keep these appointments scheduled, you can select a category of appointments that must remain scheduled. The optimization can move and then reschedule appointments in this category. If the optimization must keep more than 50 appointments scheduled, it fails.
  – Complex work information that’s not fully available in the optimization data is considered excluded from resource schedule optimization. For example, a partial chain of a scheduling dependency is excluded.
  – Resource schedule optimizations can’t run in parallel for the same service resource on the same time interval.
  – The Gantt doesn’t show percentage-based progress for resource schedule optimization requests.

• If the Fix Overlaps feature is in use, the Reshuffle other assignments option is only partially supported for this setting: When unable to find a valid schedule for an appointment. If more than one appointment is dropped from the schedule during a Fix Overlaps operation, only one of the appointments is reshuffled.

• You can use platform encryption with standard Salesforce objects and fields. With the managed package, if you encrypt custom objects and fields, scheduling and optimization can sometimes yield unexpected results.

Service Appointments
• The Owner and Parent Record fields on service appointments aren’t available in custom report types. They also can’t be referenced in formulas, validation rules, workflow rules, flows, or processes. To limit the available owners or types of service appointment parent records, use an Apex trigger.

• Service appointment fields whose values are inherited from the parent record can’t be referenced in formulas, validation rules, workflow rules, flows, or processes. The standard inherited fields are Work Type, Account, Parent Record Type, and Parent Record Status Category.

Service Reports
• Service reports can’t be created on service appointments whose parent records are assets, accounts, leads, or opportunities.

• The Create Service Report action isn’t available in the Salesforce mobile app.

• Section titles and rich text fields in service reports can’t be translated.

• Digital signature field labels can’t be customized.

• Related list filtering on service reports has the following limitations:
  – The Status field on contract line items isn’t available for filtering.
  – The Filters tab isn’t available in Internet Explorer 8.

• Service Report Template lookup isn’t supported in Visualforce pages. To include Service Report Lookup in a Visualforce page for the edit of a Work Order, create a Custom lookup.

Service Resources
• If you deactivate a service resource, make sure to update records that were associated with that resource. For example, if a deactivated service resource was a required resource for an account, update that account to prevent scheduling issues.

• Capacity-based service resources have the following limitations.
  – If the managed package is installed, capacity-based resources must include a Hours per Time Period value on their capacity record. If the user’s capacity should be measured in work items, fill out Work Items per Time Period as well and set the Hours per Time Period to a high number which likely won’t be achieved.
  – The Fix Overlaps feature isn’t support for capacity-based service resources.
Schedule optimization respects daily capacity, but not weekly or monthly.

Resource schedule optimization—the optimization of an individual service resource’s schedule—isn’t supported for capacity-based service resources.

If a service resource is capacity-based with a defined capacity, their utilization percentage isn’t shown in the Gantt.

Capacity-based resources can’t be assigned to appointments that have a scheduling dependency.

Capacity-based resources can’t be relocated or assigned to a secondary service territory.

Sharing

In Setup, Sharing Settings let you specify default internal and external access to Field Service records. For example, you can share dispatched service appointments to external Experience Builder site users, such as a team of contractors. But if the Default Internal Access is Private or Public Read Only, set the Default External Access to Private or Public Read Only also. If the internal setting is Public Read Write, external resources can see dispatched appointments only when the external setting is Public Read Write and you enable dispatch sharing to resources.

Street-Level Routing (SLR)

- If a service appointment requires a travel distance of more than 100 kilometers, aerial routing is used.
- Multiday work scheduling doesn’t support SLR and uses aerial routing instead. Predictive travel isn’t supported with complex work.
- Any scheduling action that is triggered in a transaction with data manipulation language (DML) uses aerial routing. When SLR is enabled and scheduling requires SLR travel results that are not primed locally, you must use a callout to retrieve the results. If DML occurs in the same transaction as the callout, it causes an exception, for example, an Uncommitted Work Pending error. To avoid an exception, allow the system to use aerial routing or ensure that DML is completed in a separate transaction. If you want transactions of this type to cause an exception rather than a switch to aerial routing, from the App Launcher, find and open the Field Service Admin app, and then click Field Service Settings > Scheduling. Select Avoid aerial calculation upon callout DML exception.

Set Up Field Service

Build and manage your field service operation in one place. Create records representing your workforce, set up work order tracking and inventory management, and customize the Field Service mobile app to set up your mobile workforce for success.

IN THIS SECTION:

1. Enable Field Service
   Enable Field Service to start using Field Service features.

2. Install the Field Service Managed Package
   After Field Service is enabled, install the managed package to gain access to the dispatcher console, scheduling tools, a range of custom objects, and Guided Setup.

3. Field Service Permission Set Licenses
   Permission set licenses are required for some Field Service users to interact with settings, the dispatcher console, and other features. Learn how permission set licenses match to different groups of users.

4. Set Up Service Territories, Operating Hours, and Shifts for Field Service
   Create service territories to track the places where your team performs field service work. Assign regular operating hours to each service territory to indicate when work can be performed. Create shifts to assign resources to ad hoc hours, such as holiday hours or for workers without a set schedule.
5. Set Up Work Order Management for Field Service
   A work order represents work to be performed on your customers’ products. Customize your work order settings and create time-saving templates called work types.

6. Set Up Your Field Service Workforce
   Create service resources and service crews to represent your mobile workforce. Then, assign permission sets to members of your team who work as dispatchers or support agents.

7. Set Up Your Field Service Inventory
   Track and manage the storage, request, transfer, and consumption of every item in your inventory, and ensure that your mobile workforce has the right parts in stock to do their job.

8. Get Ready for Scheduling
   Define your service appointment life cycle, configure appointment booking settings, and get to know your Field Service scheduling policies, optimization settings, and sharing settings.

9. Set Up Field Service in Experience Cloud Sites
   Keep customers, partners, and contractors in the loop about field service work by adding field service objects to your Experience Cloud site.

10. Test Your Field Service Configuration with Health Check
    Use the Field Service Health Check to run a suite of automated tests on your Field Service settings and configuration data. When Health Check identifies a problem, you get on-the-spot recommendations to align your Field Service configuration with our best practices.

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

12. Manage Data Integration Rules for Field Service
    Set up data integration rules to ensure that service resource travel time is accurately calculated.

Enable Field Service

Enable Field Service to start using Field Service features.

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

2. Enable Field Service, and click Save to display more settings.

   Note: If you don’t have a Field Service add-on license, you just see an option to enable work orders, which is on by default.

3. Optionally, turn on in-app notifications for Salesforce app and Lightning Experience users when any of the following actions occurs on a work order or work order line item that they own or follow:
   - A text or file post is added
   - A tracked field is updated
   - The record owner changes
   - The resource assignments change on a related service appointment

   If the option to track all related objects is selected in your feed tracking settings for work orders, users are also notified when child records of work orders—such as service appointments—are created or deleted.

5. When you set up work types, which are templates for work orders, you can opt to automatically add a service appointment to new work orders or work order line items associated with a work type. Configure the number of days between the created date and due date on auto-created service appointments.

6. If you want to use your knowledge base in field service, select the fields that the search engine scans to suggest articles on work orders or work order line items.

7. Save your changes.

Install the Field Service Managed Package

After Field Service is enabled, install the managed package to gain access to the dispatcher console, scheduling tools, a range of custom objects, and Guided Setup. When you install the Field Service managed package, you get the following features.

- **Guided Setup**: There’s no need to go it alone! This nifty tool walks you through key setup tasks, including assigning permission sets, creating service resources, and customizing appointment booking settings.

- **Scheduling and optimization**: Swiftly optimize your team’s schedule in a way that enforces your business objectives. Assign appointments according to your rules and priorities, such as worker skills, location, and availability.

- **Dispatcher console**: Give dispatchers and supervisors a bird’s-eye view of your field service operations. The dispatcher console includes a customizable appointment list, easy-to-reach scheduling actions, dynamic Gantt chart, and interactive map. Dispatchers can check that jobs are routed to the right people, receive alerts, and monitor appointments in real time.

- **Administration app**: Manage optimization, customize the dispatcher console, and update your managed package settings in one place.

1. Click the installation link on the download page:
   https://fsl.secure.force.com/install
   You can install the managed package on a production or sandbox org.

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

   If you receive a request to approve third-party access, click **Yes** and **Continue**. Approving this request allows the street-level routing and optimization services to function.
3. If a message indicates that the installation is taking longer than expected, click Done. You’ll receive an email notification after the installation is complete.

Once the package is installed, the App Launcher includes two new apps.

- The Field Service app is for dispatchers. The Field Service tab in this app leads to the dispatcher console.
- The Field Service Admin app is for administrators. The Field Service Settings tab in this app leads to the managed package settings.

You can add the Field Service and Field Service Settings tabs to other apps.

Note: Salesforce Setup includes a separate Field Service Settings page where you can customize general settings related to field service.
Field Service Permission Set Licenses

Permission set licenses are required for some Field Service users to interact with settings, the dispatcher console, and other features. Learn how permission set licenses match to different groups of users.

All users need the Field Service Standard user permission to access field service objects. Field Service user licenses already include this permission.

Field Service also includes three permission set licenses related to the managed package and mobile app. We recommend using the managed package’s Guided Setup tool to assign these permission set licenses; for steps, see Assign Field Service Permissions.

Your users don’t need a Field Service permission set license to access most Field Service objects. For example, inventory managers, admins, and customer support agents probably don’t need one. If Field Service is enabled, standard Salesforce users can be given access to Field Service records. These permission sets are created when you set up Field Service.

<table>
<thead>
<tr>
<th>Permission Set</th>
<th>Description</th>
<th>Who Needs It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Service Dispatcher License</td>
<td>Provides access to the dispatcher console.</td>
<td>Dispatchers</td>
</tr>
<tr>
<td>Field Service Scheduling License</td>
<td>Allows the user to be shown on the dispatcher console Gantt and included in scheduling and optimization.</td>
<td>Mobile workers (field technicians)</td>
</tr>
<tr>
<td>Field Service Mobile License</td>
<td>Provides access to the Field Service mobile app.</td>
<td>Mobile users (field technicians)</td>
</tr>
<tr>
<td>Self-service</td>
<td>Provides access to Experience Builder sites where users can view all global actions and their related objects. Provides access to create, book, and schedule their appointments.</td>
<td>Customers</td>
</tr>
</tbody>
</table>

Note: Dispatchers and field technicians can’t handle inbound customer communications in call centers, manage customer cases, or complete sales-oriented tasks without additional licenses.

IN THIS SECTION:

- Create Field Service Permission Sets
  Create Field Service permission sets from the Field Service Admin app.

- Assign Field Service Permissions
  After you create your field service permission sets, give users the permissions they need to complete their field service tasks. You can assign permissions in Setup or in Guided Setup.

- Set Custom Permissions for Field Service
  The Field Service managed package includes custom permissions that control users’ access to actions and views. For example, you can control access to bulk actions, such as dispatching, optimizing, and scheduling, or the ability to drag appointments in the Gantt.
Assign Field Service Page Layouts

The Field Service managed package provides standard object page layouts that include field service Visualforce components and Chatter actions. Assign these page layouts to the System Administrator and Standard User profiles.

Create Field Service Permission Sets

Create Field Service permission sets from the Field Service Admin app.

This is a Field Service managed package feature.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Click Getting Started and then Permission Sets. These permission sets are created.

<table>
<thead>
<tr>
<th>User Role</th>
<th>Permission Sets Created</th>
<th>Purpose</th>
</tr>
</thead>
</table>
| Field Service Admin       | FSL Admin Permissions AND Field Service Admin License* | Let users access and manage all Field Service objects, including the Field Service Visualforce pages and logic services. FSL Admin Permissions contain the permissions included in the FSL Dispatcher Permissions permission set, along with additional configuration permissions.
|                           |                                               | *The Field Service Admin License isn’t created in newer Salesforce orgs.                  |
| Field Service Agent       | FSL Agent Permissions AND Field Service Agent License* | FSL Agent Permissions provides the minimum permissions needed to use the Field Service global actions, such as Book Appointment, Get Candidates, and Emergency actions.
|                           |                                               | *The Field Service Agent License isn’t created in newer Salesforce orgs.                  |
| Field Service Resource    | Field Service Mobile License AND Field Service Scheduling License AND FSL Resource Permissions | Field Service Mobile License provides the permission set license needed for users to log into the Field Service mobile app.
|                           |                                               | Field Service Scheduling License provides the permission set license needed for the user to appear on the Gantt and to be scheduled by the scheduling engine and optimizer.
|                           |                                               | FSL Resource Permissions provides the minimum permissions needed for users to update appointment status and update their last known location.
<table>
<thead>
<tr>
<th>User Role</th>
<th>Permission Sets Created</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Service Dispatcher</td>
<td>Field Service Dispatcher License AND FSL Dispatcher Permissions</td>
<td>Field Service Dispatcher License gives users the permission set license needed to load the dispatcher console. FSL Dispatcher Permissions contain the permissions included in FSL Agent Permissions and FSL Resource Permissions along with permissions to operate the dispatcher console and run optimization.</td>
</tr>
<tr>
<td>Field Service Community Dispatcher</td>
<td>Field Service Community Dispatcher License AND FSL Community Dispatcher Permissions</td>
<td>Users can view and use the dispatcher console, view global actions and their related objects, and schedule, optimize, and dispatch service appointments.</td>
</tr>
<tr>
<td>Field Service Self Service</td>
<td>Field Service Self Service License AND FSL Self Service Permissions</td>
<td>Experience Builder site users can view all global actions and their related objects to create, book, and schedule their appointments. Note: Make sure the Field Service Standard permission set license is assigned to relevant guest users. Clone the Field Service Self Service permission set to create a new permission set for these guest users. Remove all Edit and Delete permissions from all objects in the new cloned permission set, and then assign this permission set to the relevant guest users. When updating the self service permission set, first unassign any guest users from the permission set and then click Update Permissions on the permission set tile.</td>
</tr>
<tr>
<td>Field Service Integration</td>
<td>Field Service Integration</td>
<td>Users can access data needed for optimization, automatic scheduling, and service appointment bundling.</td>
</tr>
<tr>
<td>Field Service Bundle for Dispatcher</td>
<td>Field Service Bundle for Dispatcher License AND FSL Bundle for Dispatcher Permissions</td>
<td>Users can schedule and manage bundled service appointments.</td>
</tr>
</tbody>
</table>

When a permission set is current, the **Create Permissions** link on the tile is replaced by a message indicating that it’s up to date.
Assign Field Service Permissions

After you create your field service permission sets, give users the permissions they need to complete their field service tasks. You can assign permissions in Setup or in Guided Setup.

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click a user’s name.
3. Click Permission Set Assignments at the top of the page or scroll to the Permission Set Assignments related list.
4. Click Edit Assignments.
5. Enable the appropriate permission sets and click Save.

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Permission Sets</th>
</tr>
</thead>
</table>
| **Admin:** Manage all Field Service objects, including the Field Service Admin app, Field Service Visualforce pages, and logic services. | • FSL Admin Permissions  
• Field Service Admin License*  
*The Field Service Admin License permission set isn’t created in newer Salesforce org, so it doesn’t need to be assigned to users. |
| **Agent:** Access all global actions and their related objects to create, book, and schedule service appointments. | • FSL Agent Permissions  
• Field Service Agent License*  
*The Field Service Agent License permission set isn’t created in newer Salesforce orgs, so it doesn’t need to be assigned to users. |
| **Dispatcher:** Access all global actions and their related objects to create, book, and schedule service appointments. | • Field Service Dispatcher License  
• FSL Dispatcher Permissions |
| **Technician:** Manage service appointments and their related parent objects. | • Field Service Mobile License  
• Field Service Resource License  
• FSL Resource Permissions |

Tip: Alternatively, you can assign permission sets to users from Guided Setup.

1. Open Field Service Admin from the App Launcher.
2. Click Field Service Settings.
3. On the Getting Started page, click Go to Guided Setup.
4. Assign permissions in the Create Service Resources and Create Dispatchers and Agents steps.
5. To assign a permission set license and its associated permission sets to a user, click the icon in the Licenses column.
You can always make further changes in Setup.

This is a Field Service managed package feature.

IN THIS SECTION:

How Are Field Service Permission Sets Updated?
Permission sets provided by the Field Service managed package are automatically updated at the beginning of each major release.

How Are Field Service Permission Sets Updated?
Permission sets provided by the Field Service managed package are automatically updated at the beginning of each major release.

This is a Field Service managed package feature.

The managed package has three major releases each year that follow the Salesforce release cadence within 72 hours: Winter, Spring, and Summer.

Because new versions require new permissions, the permission sets provided by the managed package must be updated to include any new required permissions. All managed package-provided permission sets are updated when a user launches one of the following pages:

- Dispatcher Console (vf001_ServiceExpert)
- Book Appointment Chatter action (AppointmentBookingVf and AppointmentBookingCommunitiesVf)
- Candidates Chatter action (GetCandidates)
- Emergency Chatter action (EmergencyWizard)
- Admin Settings (vf066_settings)

EDITIONS
Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.
During this update process, any minimum permissions that were removed from the permission set are readded. Permissions added by an admin aren’t removed.

To check if a permission set is current, from the App Launcher, find and open the Field Service Admin app. Click Field Service Settings > Getting Started > Permission Sets. Each permission set tile includes a message indicating that it’s current. If it doesn’t, click Update Permissions on the tile.

⚠️ Important: Auto-update of permission sets is logged on the behalf of the user who triggered the update, even if the user doesn’t have permission to update permission sets. To turn off this process, ask Salesforce to disable the Auto Update of Field Service Permission Sets feature. To update permissions for Apex Class, Record Types, and Tabs Visibility, you must be an admin or have ModifyAllData or ModifyMetadata permissions.

**Set Custom Permissions for Field Service**

The Field Service managed package includes custom permissions that control users’ access to actions and views. For example, you can control access to bulk actions, such as dispatching, optimizing, and scheduling, or the ability to drag appointments in the Gantt.

⚠️ This is a Field Service managed package feature.

The list of Custom Permissions is on the Custom Permissions page in Setup. To assign them to users, add the custom permissions to a permission set. From Setup, in the Quick Find box, enter Permission Sets, and then select Permission Sets. Select the permission set and then select Custom Permissions. For example, add them to the Field Service Admin, Field Service Dispatcher, and Field Service Community Dispatcher custom permission sets before adding assigned users.

Optionally, you can give users the extended custom permissions marked in the table. To use these permissions, add them to users, and then activate them in Field Service Settings > Dispatcher Console UI > Extended Custom Permissions.

⚠️ Important: If you activate the extended permissions without first adding them to users, you make the Gantt read-only. Activation is required only after in existing orgs and is irreversible. Extended Custom Permissions is automatically activated in Salesforce as of Summer ’20.

The managed package custom permissions use the FSL namespace prefix.

<table>
<thead>
<tr>
<th>Custom Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abort Optimization Request</td>
<td>Abort an optimization request from the Gantt.</td>
</tr>
<tr>
<td>Bulk Bundle</td>
<td>Bundle selected appointments from the appointment list.</td>
</tr>
<tr>
<td>Bulk Dispatch</td>
<td>Dispatch selected appointments from the appointment list.</td>
</tr>
<tr>
<td>Bulk Optimize</td>
<td>Submit an optimization request from the appointment list.</td>
</tr>
<tr>
<td>Bulk Schedule</td>
<td>Schedule selected appointments from the appointment list or from polygons.</td>
</tr>
<tr>
<td>Bulk Unbundle</td>
<td>Unbundle selected appointments from the appointment list.</td>
</tr>
<tr>
<td>Bulk Unschedule</td>
<td>Unschedule selected appointments from the appointment list or from polygons.</td>
</tr>
<tr>
<td>Create Absences from Gantt</td>
<td>Create resource absences on the Gantt.</td>
</tr>
<tr>
<td>Create Custom Gantt Filters</td>
<td>Create custom filters for appointments on the Gantt.</td>
</tr>
<tr>
<td>Fill-in</td>
<td>Fill in schedule gaps from the resource action menu.</td>
</tr>
<tr>
<td>Custom Permission</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Fix Overlaps</td>
<td>Resolve overlapping appointments from the resource action menu.</td>
</tr>
<tr>
<td>Enable Check Rules - All Services</td>
<td>Initiate a rule validation check on demand. This checks rules for all services loaded on the Gantt when the rule validation frequency isn’t <strong>Always</strong>.</td>
</tr>
<tr>
<td>Enable Gantt Locker</td>
<td>Lock and unlock the Gantt chart using the Gantt locker. This action also disables dragging appointments to the Gantt from the appointment list or map. Without this permission, Gantt access is read-only. Standard and custom actions on the appointment list and map are still shown and enabled according to your org’s setup. This permission is an extended custom permission.</td>
</tr>
<tr>
<td>Gantt - Enable Gantt Policy Picker</td>
<td>Select a nondefault policy for scheduling and calculating rule violations. This permission is an extended custom permission.</td>
</tr>
<tr>
<td>Gantt and List - Bundle and Unbundle</td>
<td>Bundle and unbundle service appointments from the Gantt or from the appointment list.</td>
</tr>
<tr>
<td>Gantt and List - Enable Bulk Check Rule</td>
<td>Check rules for multiple service appointments from the Gantt or from the appointment list.</td>
</tr>
<tr>
<td>Gantt and List - Enable Check Rules</td>
<td>Check rules for a single service appointment from the Gantt or from the appointment list.</td>
</tr>
<tr>
<td>Gantt and List - Show Get Candidates</td>
<td>Find resources for an appointment from the appointment list or from the Gantt. This permission is an extended custom permission.</td>
</tr>
<tr>
<td>Gantt and Map - Enable Drag and Drop</td>
<td>Drag selected services and resource absences from the appointment list, map, or Gantt, and place them on the Gantt. This permission is an extended custom permission.</td>
</tr>
<tr>
<td>Gantt Palettes Edit</td>
<td>Create, edit, and delete Gantt palettes.</td>
</tr>
<tr>
<td>Gantt Palettes View</td>
<td>View the Palettes tab in the Gantt, and apply the selected palette.</td>
</tr>
<tr>
<td>Gantt - Show Change Status Action</td>
<td>Change the status from the Gantt. Without this permission, users can’t dispatch from the map. This permission is an extended custom permission.</td>
</tr>
<tr>
<td>Gantt - Show Pin Service</td>
<td>Pin or unpin appointments from the Gantt. This permission is an extended custom permission.</td>
</tr>
<tr>
<td>Gantt - Show Unschedule</td>
<td>Unschedule appointments from the Gantt. This permission is an extended custom permission.</td>
</tr>
<tr>
<td>Group Nearby</td>
<td>Adjust the schedule on the Gantt to find other appointments on that day that are close to the selected appointment.</td>
</tr>
<tr>
<td>Hide map on Emergency Wizard</td>
<td>Hide the map view in the Emergency Wizard to show just candidates.</td>
</tr>
<tr>
<td>Hide Live Positions from Dispatcher Console Map</td>
<td>Hide the Live Positions marker from the dispatcher console map.</td>
</tr>
<tr>
<td>Hide Actual Routes from Resource Map</td>
<td>Hide the Actual Route from the service resource’s map.</td>
</tr>
<tr>
<td>Hide Live Positions from Resource Map</td>
<td>Hide the Live Positions marker from the service resource’s map.</td>
</tr>
<tr>
<td>Hide Resource’s Last Seen Time from Gantt</td>
<td>Hide the service resource’s Last-Seen indicator from the Gantt.</td>
</tr>
<tr>
<td>Custom Permission</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Longterm View</td>
<td>Show the Long-Term Gantt view in the dispatcher console. When this permission is enabled, the Long-Term Gantt view replaces the multi-day view.</td>
</tr>
<tr>
<td>Map Polygons - Show In Jeopardy</td>
<td>Show the In Jeopardy flag from a map polygon. This permission is an extended custom permission.</td>
</tr>
<tr>
<td>MDT View</td>
<td>Show the multi-day view in the dispatcher console. The Long-Term Gantt view replaces the multi-day view.</td>
</tr>
<tr>
<td>Monthly Utilization</td>
<td>Show utilization in the Gantt resolution menu in the top-right corner.</td>
</tr>
<tr>
<td>Policy Picker in Appointment Booking</td>
<td>Change the scheduling policy in the Book Appointment action.</td>
</tr>
<tr>
<td>Policy Picker in Get Candidates</td>
<td>Change the scheduling policy in the Get Candidates action.</td>
</tr>
<tr>
<td>Polygons - create\update</td>
<td>Create and update map polygons.</td>
</tr>
<tr>
<td>Polygons - view</td>
<td>View map polygons.</td>
</tr>
<tr>
<td>Publish custom Gantt filters</td>
<td>Share custom filters for appointments on the Gantt.</td>
</tr>
<tr>
<td>Reshuffle</td>
<td>Reshuffle appointments from the appointment action menu or when you right-click services on the Gantt.</td>
</tr>
<tr>
<td>Resource Schedule Optimization</td>
<td>Optimize a resource’s schedule from the resource action menu.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Schedule an appointment from the appointment list or from the map.</td>
</tr>
<tr>
<td>Service List View - Canceled</td>
<td>Show the Canceled appointment list.</td>
</tr>
<tr>
<td>Service List View - Contractors</td>
<td>Show the Contractors appointment list.</td>
</tr>
<tr>
<td>Service List View - Crews</td>
<td>Show the Crews appointment list.</td>
</tr>
<tr>
<td>Service List View - Exclude Bundle Members</td>
<td>Show service appointments that aren’t bundle members in the appointment list.</td>
</tr>
<tr>
<td>Service List View - Flagged</td>
<td>Show the Flagged appointment list.</td>
</tr>
<tr>
<td>Service List View - Gantt</td>
<td>Show the Gantt appointment list.</td>
</tr>
<tr>
<td>Service List View - In Jeopardy</td>
<td>Show the In Jeopardy appointment list.</td>
</tr>
<tr>
<td>Service List View - Rule Violating</td>
<td>Show the Rule Violating appointment list.</td>
</tr>
<tr>
<td>Service List View - Scheduled</td>
<td>Show the Scheduled appointment list.</td>
</tr>
<tr>
<td>Service List View - Selected</td>
<td>Show the Selected appointment list.</td>
</tr>
<tr>
<td>Service List View - Todo</td>
<td>Show the Todo appointment list.</td>
</tr>
<tr>
<td>Service List View - Unscheduled</td>
<td>Show the Unscheduled appointment list.</td>
</tr>
<tr>
<td>Streaming API</td>
<td>After activating Gantt Live Updates, use the streaming API to send live streaming updates of the Gantt. When this permission is disabled, users see only Gantt changes timed using the interval defined in Field Service Settings &gt; Dispatcher Console UI &gt; Timed Updates.</td>
</tr>
<tr>
<td>Custom Permission</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Utilization on Service Territory</td>
<td>For the selected Gantt horizon, view utilization percentages for each territory’s workforce.</td>
</tr>
<tr>
<td>View resource on secondary STM</td>
<td>Show a resource’s secondary territory membership on the Gantt.</td>
</tr>
</tbody>
</table>

**Example:** To limit the dispatchers who can optimize your schedule so the system isn’t bogged down with optimization requests, remove custom permissions for bulk actions in the dispatcher console:

- FSL.Bulk Dispatch
- FSL.Bulk Optimize
- FSL.Bulk Schedule
- FSL.Bulk Unschedule

A user with the FSL.Bulk Optimize custom permission sees the **Optimize** action. Users without it can’t run an optimization. Removing any of these custom permissions hides the action in the user interface.

**Assign Field Service Page Layouts**

The Field Service managed package provides standard object page layouts that include field service Visualforce components and Chatter actions. Assign these page layouts to the System Administrator and Standard User profiles.

- **This is a Field Service managed package feature.**

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

1. From Setup, enter **Profiles** in the Quick Find box, then click **Profiles**.
2. Click **System Administrator**.
3. In the Page Layouts section, find the Operating Hours object and click **View Assignment**.
4. Selecting all profiles and assign the **Field Service Operating Hours Layout**.
5. Click **Save**.
6. Repeat the previous steps for the following objects.
   - Service Appointment: Assign the **Field Service Service Appointment Layout**
   - Service Resource: Assign the **Field Service Service Resource Layout**
   - Work Order: Assign the **Field Service Work Order Layout**
   - Work Order Line Item: Assign the **Field Service Work Order Line Item Layout**
   - Work Type: Assign the **Field Service Work Type Layout**
7. Save your changes.
8. Repeat the previous steps for the Standard User profile.

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**EDITIONS**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

**USER PERMISSIONS**

To customize the Field Service managed package:

- Customize Application

To assign page layouts:

- Manage Profiles and Permission Sets
Set Up Service Territories, Operating Hours, and Shifts for Field Service

Create service territories to track the places where your team performs field service work. Assign regular operating hours to each service territory to indicate when work can be performed. Create shifts to assign resources to ad hoc hours, such as holiday hours or for workers without a set schedule.

IN THIS SECTION:

Create Service Territories for Field Service

Create hierarchies of service territories to organize your field service workforce and ensure that service resources are assigned to service appointments near their home base. Service territories typically represent geographical areas where your team works, but they can also be functional territories such as field sales and field service.

Set Up Shifts for Field Service

Shifts in Field Service let you define variable working periods for your shift-based workforce, such as contractors or on-call staff. Create shifts for particular dates and times when you need coverage, and assign them to service resources. When the managed package is installed, scheduling and optimization consider workforce availability during shifts.

Create Service Territories for Field Service

**USER PERMISSIONS**

<table>
<thead>
<tr>
<th>To create service territories:</th>
<th>Create on service territories</th>
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</thead>
<tbody>
<tr>
<td>To view service territories and the Service Territories tab:</td>
<td>Read on service territories</td>
</tr>
<tr>
<td>To edit service territories:</td>
<td>Edit on service territories</td>
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<tr>
<td>To delete service territories:</td>
<td>Delete on service territories</td>
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<tr>
<td>To view service territory locations:</td>
<td>Read on service territories</td>
</tr>
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<td>To create, update, or delete service territory locations:</td>
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</tr>
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</table>

Create hierarchies of service territories to organize your field service workforce and ensure that service resources are assigned to service appointments near their home base. Service territories typically represent geographical areas where your team works, but they can also be functional territories such as field sales and field service.

Before you start, make a list of the territories you want to create and who works in each territory. To keep scheduling straightforward, try to create territories with no more than 50 mobile workers assigned to them.

You can organize service territories into hierarchies of up to 10,000 territories. We recommend creating the highest-level territories first. For example, create a San Francisco Bay Area territory with four child territories: Peninsula, North Bay, South Bay, and East Bay.

If the Field Service managed package is installed, use Guided Setup to quickly create your service territories.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Click Go to Guided Setup. When you launch guided setup, your Field Service permission sets are scanned to make sure that they’re up-to-date. You see a message if you’re missing a necessary permission.

3. Click Create Service Territories.

4. Create your territories one by one. Click a territory name to update its name, operating hours, and address.

5. Operating hours indicate the working hours of mobile workers in the territory. Territory members use these hours unless different hours are specified on their service territory member records. Use the lookup to select existing operating hours, or click New Operating Hours to create your own.
   - To create more complex or varying time slots, save your new operating hours and click Open Operating Hours Record below the Operating Hours field. Then, customize your time slots in the Time Slots related list.
   - To avoid issues with appointment booking, always specify a time zone on your operating hours.

6. Drag territories within the list to create a hierarchy.

7. To update additional fields on a service territory or attach files, select the territory name and click Open Service Territory Record. If the managed package isn’t installed, create and manage service territories from the Service Territories tab.

IN THIS SECTION:

Guidelines for Creating Service Territories for Field Service
Learn how to use service territories to track where your field service team works.

Guidelines for Creating Operating Hours for Field Service
Operating hours in Field Service can represent mobile worker hours, service territory hours, appointment arrival windows, and customer appointment time preferences. Learn how to set operating hours for each scenario.

Guidelines for Creating Service Territories for Field Service
Learn how to use service territories to track where your field service team works.

Creating Service Territories
Create service territories from Guided Setup or from the Service Territories tab. Depending on how your business works, you can create territories to represent geographic regions, such as cities, counties, and neighborhoods. The territory location is stored in the address section. If you plan to build out a hierarchy of service territories, create the highest-level territories first. Service territory hierarchies can contain up to 10,000 territories.

Note: When you create a service territory, public groups are created in your org. These groups are used with the Field Service managed package to ensure that the correct data is available even when field service object access is set to private.

Determining Territory Size
The size of your service territories has a significant impact on scheduling, optimization, and dispatching. If a service territory is too large and many service resources and dispatchers are assigned to it, optimization and dispatching become cumbersome. Try to stay within these suggested limits when designing your service territories:
   - Up to 50 service resources per service territory
   - Up to 1,000 service appointments per day per service territory
   - Up to 20 qualified service resources per service appointment

Creating Service Territory Members
Service territory members are service resources who work within the territory. Associating them with a territory ensures that they’re assigned to appointments near their home base.
Note: Service territory members must have their home base location geocoded so that the scheduling engine knows the resource's start and end points.

Assign service resources to service territories in the Service Territories related list on the resource detail page or the Service Territory Members related list on the territory detail page. Use the Type field to indicate whether the territory is a primary, secondary, or relocation territory for the resource.

- The primary territory is typically the territory where the resource works most often—for instance, near their home base. Resources can have only one primary territory. If a Match Territory work rule is included in the applied scheduling policy, the resource can be assigned only to appointments in their primary or relocation territories.
- Secondary territories are territories where the resource can be assigned to appointments if needed. A resource can have more than one secondary territory.
- Relocation territories represent temporary moves and, during their active dates, serve as the primary territory during scheduling. If a Working Territories work rule is included in the applied scheduling policy, the resource can also be assigned to appointments in their secondary territories.

Setting Membership Start and End Times

Follow these best practices to avoid issues during scheduling and optimization.

- Service territory memberships should be 24 hours or longer.
- Service territory memberships should start and end at the same hour, and shouldn’t fall inside the operating hours listed on the membership record (or if no hours are listed, on the service territory). This way, there's no question about the resource’s availability on their first day as a member of the territory. For simplicity, we recommend using midnight (00:00). For example:
  - Start Date: 1/12/2019 00:00
  - End Date: 3/12/2019 00:00

Note: We recommend using 00:00 because it aligns with Field Service’s default Start of Day, which is 00:00. However, you can set a custom Start of Day on Service Resource Availability work rules if the default doesn’t make sense—for example, if your team typically works night shifts. To enforce a custom Start of Day, from the Field Service Admin app, click Field Service Settings > Scheduling and select Set the hour that starts a new day based on the Availability rule(s).

If the applied scheduling policy uses a custom Start of Day, set your service territory memberships to start and end at that time rather than at midnight.

- During scheduling and optimization, Field Service uses the service territory member’s own time zone—set on the user record—to interpret the territory membership start and end times. If the user’s time zone differs from the service territory’s time zone, adjust the membership start and end time accordingly. For example, if the user’s time zone is 3 hours behind the service territory’s time zone, set the territory membership start time to 3:00 rather than 00:00.
- If you’re using optimization, service territory memberships can’t be longer than three years. If you need a service territory membership to be longer than three years, keep the End Date fields blank.

Deleting Service Territories

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

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

Adding Locations to Service Territories

Associate location records with service territories from the Service Territory Locations related list. Add site, plant, and warehouse locations to the service territory in which they’re located. Add mobile locations, like vans, to the service territories where they can be used for field service work.
Guidelines for Creating Operating Hours for Field Service

**USER PERMISSIONS**

| To view operating hours and time slots: | Read on operating hours |
| To create operating hours: | Create on operating hours |
| To assign operating hours to service resources: | Edit on service resources |
| To assign operating hours to service territories: | Edit on service territories |
| To assign operating hours to accounts: | Edit on accounts |
| To update, create, or delete time slots: | Edit on operating hours |

Editions

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in **Enterprise, Unlimited, and Developer Editions**.

Operating hours in Field Service can represent mobile worker hours, service territory hours, appointment arrival windows, and customer appointment time preferences. Learn how to set operating hours for each scenario.

<table>
<thead>
<tr>
<th>When operating hours are associated with...</th>
<th>They represent...</th>
<th>How to configure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>The hours when the customer allows service appointments</td>
<td>Update the Operating Hours field on an account.</td>
</tr>
<tr>
<td>Service territories</td>
<td>The default working hours for the service territory members, unless different hours are specified on a service territory member record.</td>
<td>Select operating hours when creating a service territory in Guided Setup. Or, update the Operating Hours field on the service territory record.</td>
</tr>
<tr>
<td>Service territory members</td>
<td>The hours when the member (a service resource) is available to work</td>
<td>Update the Operating Hours field on a service territory member record.</td>
</tr>
<tr>
<td>Appointment booking</td>
<td>The appointment booking arrival windows offered to customers during scheduling</td>
<td>Select your default operating hours for appointment booking in the <strong>Customize Appointment Booking</strong> step in Guided Setup. Or, from the App Launcher, find and open the <strong>Field Service Admin</strong> app, and then click <strong>Field Service Settings &gt; Global Actions &gt; Appointment Booking</strong>. Then, update the Default Operating Hours field.</td>
</tr>
</tbody>
</table>

**Tip:** If different appointment booking windows are needed for different level of service—for instance, standard customers get 4-hour booking windows while VIP customers get 2-hour windows—add entitlements to your work orders. In the Operating Hours field on the entitlement, select the appropriate appointment booking window operating hours.

**Create Operating Hours**

We recommend creating operating hours in Guided Setup—a Field Service managed package feature—to save time and gain visibility into how they’re used. Operating hours are an element of the following Guided Setup steps.
• Create Service Territories
• Create Service Resources
• Customize Appointment Booking

You can also create and manage operating hours from the Operating Hours tab, outside of Guided Setup. By default, only System Administrators can view, create, and assign operating hours.

Operating hours are composed of time slots, which are managed from the Time Slots related list on an operating hours record. Time slots can vary by day. A day can have multiple time slots, but they must be adjacent for the hours to be respected during optimization. For example, an operating hours record can have the following time slots.

- Monday, 9 AM to 5 PM
- Tuesday, 9 AM to 5 PM
- Wednesday, 6 AM to 12 PM and Wednesday, 12 PM to 6 PM
- Thursday, 9 AM to 5 PM
- Friday, 9 AM to 5 PM

If a resource is unavailable during the day at a specific time slot, you must indicate this using Resource Absence, and not split availability. For example, if a service resource is available on Wednesday, 6 AM to 12 PM, and again from 1 PM to 6 PM, then extend availability from 6 AM to 6 PM and insert a Resource Absence between 12 PM and 1 PM.

Each operating hours record is associated with a time zone, which ensures that scheduling and optimization function properly. For appointment booking hours, Field Service uses the time zone listed on the operating hours of the service appointment’s service territory. This way, one operating hours record can be used to represent appointment booking windows across your customer base.

Note: If you have access to 2,000 or more service territories, the appointment list shows only selected territories. Use the search bar to find territories that aren’t selected.

Assign Operating Hours to Service Resources

A service resource’s hours can vary depending on the service territory where the resource is working. Service resources therefore have unique operating hours for their primary and secondary territories. Service territory members automatically use their service territory’s operating hours, although the Operating Hours field on the service territory member record appears blank. If a resource needs different operating hours than their territory, assign them separate operating hours on their service territory member record.

To view a service territory member record, click the member number in one of the following related lists.

- Service Territory Members list on the service territory
- Service Territories list on the service resource

Operating hours listed on a secondary territory member record are respected during scheduling only if:

- They use the same time zone as the resource’s primary territory membership’s hours
- They’re identical to or contained within the resource’s primary territory membership’s hours
- **Respect secondary STM operating hours** is selected in the Field Service Admin app. Click **Field Service Settings > General Logic**.

Otherwise, the primary service territory operating hours are used.

For example, suppose a user has a primary and secondary service territory. Her Monday hours are 12 PM to 5 PM in the primary territory, but 9 AM to 5 PM in the secondary territory. When she’s being scheduled to a Monday service appointment in the secondary territory, her primary hours are used because they’re more restrictive.
Enforce Operating Hours

If the Field Service managed package isn’t installed, operating hours serve as a suggestion rather than a rule. If the managed package is installed, here’s how operating hours affect scheduling.

- During schedule optimization, service resources are assigned only to appointments that fall within the operating hours listed on their service territory member record or, if none are listed, on the primary service territory record.
- The Field Service - Service Appointment Visiting Hours work rule type ensures that a customer’s appointments fall within their account’s operating hours. Add a work rule of this type to any scheduling policy.

Tip: Create Apex triggers that limit time slot settings. For example, restrict the start and end times on time slots to half-hour increments, or prohibit end times later than 8 PM.

Set Up Shifts for Field Service

Shifts in Field Service let you define variable working periods for your shift-based workforce, such as contractors or on-call staff. Create shifts for particular dates and times when you need coverage, and assign them to service resources. When the managed package is installed, scheduling and optimization consider workforce availability during shifts.

IN THIS SECTION:

What Are Shifts?
Shifts let you set up work intervals that vary from day to day or week to week. You can extend or replace your operating hours with shifts.

Create a Job Profile for Shifts
A job profile lets you describe different types of shifts based on the required skills—for example, a night manager versus weekend on-call worker. Add skills to a job profile to indicate the experience or expertise that’s required for a service resource.

What Are Shifts?

Shifts let you set up work intervals that vary from day to day or week to week. You can extend or replace your operating hours with shifts.

Shifts are similar to operating hours in Salesforce, with some key differences. Operating hours let you define consistent, ongoing time slots when your team is available. Shifts, by contrast, let you define variable time slots that can vary from day to day. You can use both shifts and operating hours to assign work, so that you can assign team members to shifts where and when they’re needed.

For example, if you use operating hours for your regular weekday hours, you can create shifts to define weekend on-call duties. Shifts can also replace operating hours; for example, you can create shifts for a workforce of students or contractors that don’t have regular work hours.

When the managed package is installed, scheduling and optimization consider shift availability. Confirmed shifts appear on the Gantt.

Prerequisites for Using Shifts

Make sure that your Salesforce org meets the following requirements to use shifts.

- You must have at least one service territory.
- You must have at least one service resource who’s assigned to a service territory.
• To let them create shifts, give your shift and service managers access to view, create, and edit the following objects:
  – Shifts
  – Job Profiles
  – Service Territories
  – Service Resources
  – Service Territory Memberships
• To select job profiles when you create shifts, add the Job Profile field to shift layouts.
• To select recordset filter criteria when you create shifts, add the Recordset Filter Criteria field to shift layouts. Give users access to view the Recordset Filter Criteria object.

Limitations for Shift Management
• Scheduling and optimization features in the managed package don’t consider job profiles.
• In the Shifts tab, you can’t use the quick search box to filter.
• The NOT operator isn’t supported when you define filter logic for shifts. If your filter logic uses NOT, we recommend adjusting the filter type instead, for example by using the does not contain operator.

Create a Job Profile for Shifts
A job profile lets you describe different types of shifts based on the required skills—for example, a night manager versus weekend on-call worker. Add skills to a job profile to indicate the experience or expertise that’s required for a service resource.
1. From the App Launcher, click Job Profiles.
2. Click New.
3. Enter a name and description for the job profile.
4. Associate skills with the job profile.
   a. In the Related tab, next to Skill Requirements, click New.
   b. Select the skill and skill level that are required for the job profile. You can also create skills.
   c. Click Save.
      To continue adding skills, repeat these steps.
5. Click Save.
Set Up Work Order Management for Field Service

A work order represents work to be performed on your customers’ products. Customize your work order settings and create time-saving templates called work types.

IN THIS SECTION:

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

Customize Work Order Settings for Field Service
To control how your team works with work orders and work types, customize page layouts and assign user permissions.

Set Up Knowledge for Work Orders
Attach knowledge articles to work orders, work order line items, and work types to share guidelines and specs with mobile workers in the field. Learn how to customize page layouts to let your team view or manage attached articles, also known as linked articles.

Set Up Path for Field Service
To guide your team as they complete field service jobs, add an interactive, color-coded progress bar to work orders, work order line items, and service appointments.

Create Work Types for Field Service

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

Before you start, make a list of the work types you want to create. For example, a heater installation company can create work types names Install Heater, Repair Heater, and Replace Heater. List the skills and parts required to complete each task, and any knowledge articles that should be attached to it such as specs or guidelines.

If the Field Service managed package is installed, use Guided Setup to quickly create your work types.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.

2. Click Go to Guided Setup. When you launch guided setup, your Field Service permission sets are scanned to make sure that they’re up-to-date. You see a message if you’re missing a necessary permission.

3. Click Create Work Types and Skills.

4. Enter a name to create a work type, and update the Name, Description, Due Date Offset, and Estimated Duration.

    Tip: Hover over each field’s info icon for help filling it out.

5. Select Auto-Create Service Appointment to generate a child service appointment when a work order or work order line item is created from the work type.

6. Optionally, add required skills to represent the expertise or certification needed to complete the work. You can add a skill level from the work type’s Skill Requirements related list, outside of Guided Setup.
7. To update additional fields and add supporting records, select a work type in the list and click **Open Work Type Record**.

8. To apply a work type to a work order or work order line item, select the work type in the Work Type field on the record when creating it. When you add a work type, the record inherits settings from the work type.

If the managed package isn’t installed, create and manage work types from the Work Types tab.

**IN THIS SECTION:**

Guidelines for Creating Work Types for Field Service

Work types help you standardize your field service processes. Learn about inherited work type settings, required skills and products, auto-created service appointments, and attaching knowledge articles.

Guidelines for Creating Skills for Field Service

Assign skills to service resources to represent certifications or areas of expertise. Add skill requirements to work types, work orders, and work order line items to indicate the skills needed to complete the work.

### Guidelines for Creating Work Types for Field Service

Work types help you standardize your field service processes. Learn about inherited work type settings, required skills and products, auto-created service appointments, and attaching knowledge articles.

Work orders and work order line items that contain a value in the Work Type field inherit the following values from their work type:

- Duration
- Duration Type
- Required skills (found in the Skill Requirements related list)
- Required products (found in the Products Required related list)
- Linked articles (found in the Articles related list)

Service appointments with a value in the Work Type field inherit their work type’s Duration and Duration Type.

You can update a record’s settings after they’re inherited from the work type.
Skill Requirements

Skill requirements on work types represent the skills that are needed to complete the work. Work orders and work order line items inherit their work type’s skill requirements. Define required skills in the Skill Requirements related list.

You can enforce skill requirements during schedule optimization using the Match Skills work rule in a scheduling policy. If you’re not using the Field Service managed package, skill requirements serve as a suggestion rather than a requirement.

If you add a work type to an existing work order, the work order only inherits the skill requirements if the work order didn’t yet have any. Similarly, updating a work type’s skill requirements doesn’t affect work orders that were already created using that work type.

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

Note: Customizations to skill requirements, such as validation rules or Apex triggers, are not carried over from work types to work orders and work order line items.

Required Products

Required products on work types represent the products that are needed to complete the work. Work orders and work order line items inherit their work type’s required products. Define required products in the Products Required related list.

If you add a work type to an existing work order, the work order only inherits the required products if the work order didn’t yet have any. Similarly, updating a work type’s required products doesn’t affect work orders that were already created using that work type.

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

Note: Customizations to required products, such as validation rules or Apex triggers, are not carried over from work types to work orders and work order line items.

Auto-Created Service Appointments

If the Auto-Create Service Appointment option on a work type is selected, a service appointment is created when the work type is applied to a work order or work order line item. The service appointment lists the work type in its Work Type field and inherits the work type’s Duration and Duration Type. A service appointment isn’t created if the work order or work order line item already has an appointment.

If a user selects Auto-Create Service Appointment on an existing work type, service appointments aren’t created on work orders and work order line items that were already using the work type.

Exact Appointments Setting

When you schedule a service appointment that has an associated work type, scheduling also considers the Exact Appointments field in the work type. If Exact Appointments is selected in the work type, then the appointment’s time slot reflects the duration of the work rather than a time window in which the work occurs.

Knowledge Articles

When you attach a knowledge article to a work type, the article shows up on work orders and work order line items that use the work type. For example, if you have a work type named Solar Panel Replacement, you can attach an article that explains how to replace a solar panel. Any work order using that work type automatically includes the article, and the person assigned to the work order has the instructions at their fingertips.

Articles on work types work a little differently than articles on work orders and work order line items. Here are the differences:

- A Linked Work Types related list isn’t available on article page layouts, so you can’t see which work types an article is attached to.
- The Knowledge One widget isn’t available on work types in the console in Salesforce Classic, but the Articles related list is.

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To ensure that field service records are associated with the most current versions of knowledge articles, articles attached to work types don’t specify an article version. For this reason:

– When work orders and work order line items inherit an article from their work type, they inherit the latest version of the article published in their org’s default Knowledge Settings language.

– An article attached to a work type may display in a different title or language in the Articles related list versus in the Knowledge Lightning component. The Articles related list reflects the article version that is inherited by work orders and work order line items using the work type.

Guidelines for Creating Skills for Field Service

Assign skills to service resources to represent certifications or areas of expertise. Add skill requirements to work types, work orders, and work order line items to indicate the skills needed to complete the work.

If the Field Service managed package is installed, you can easily create and assign skills in Guided Setup when you create work types and service resources.

If you’re not using Guided Setup, create skills in Setup first. Then, assign them to service resources or create skill requirements.

Note: The Field Service managed package comes with the Skill Selector Visualforce page component (vf034_Skill_Selector_V2_Resource_Page) that supports up to 3000 records listed alphabetically by skill name. Any other skills aren’t loaded, such that even if they’re assigned, they aren’t displayed.

1. Decide how to measure skill level. Skills and skill requirements can be assigned a skill level between 0 and 99.99. For example, use the Skill Level field to indicate years of experience, or create a matrix that corresponds professional license classes to skill level numbers.

   Tip:
   
   • Create validation rules to limit potential skill level values. For example, only allow multiples of 10.
   • Create field-level help to let your users know how skill level is determined.

2. Create skills in Setup (supported only in Salesforce Classic).
   
   a. From Setup in Salesforce Classic, enter Skills in the Quick Find box, then select Skills under Field Service.
   b. Enter a name, like Electrician Certification, and a description.
   c. Skip the Assign Users and Assign Profiles sections, which are specific to Chat.
   d. Save your changes.

3. Assign the skill to service resources (supported in both Salesforce Classic and Lightning Experience).
a. From a service resource record, create a resource skill in the Skills related list.

b. Select a skill, and enter a skill level from 0 to 99.99.

c. Enter a start date and, if needed, an end date. For example, if a mobile worker must be recertified in a particular skill every six months, enter an end date that’s six months later than the start date.

d. Save your skill.

4. Add the skill as a requirement on work types, work orders, or work order line items (supported in both Salesforce Classic and Lightning Experience). Work orders and work order line items inherit their work type’s skill requirements.

   a. From a work type, work order, or work order line item record, create a skill requirement in the Skill Requirements related list.
   
   b. Select a skill, and enter a skill level from 0 to 99.99.
   
   c. Save your skill requirement.

Customize Work Order Settings for Field Service

To control how your team works with work orders and work types, customize page layouts and assign user permissions.

1. Assign user permissions.

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

2. Customize the fields and related lists on the following objects’ page layouts.
If you have your own field service terminology, remember that you can rename an object's tab and labels. In Setup, select **Rename Tabs and Labels**, and enter your own term for the object you'd like to rename.

### Page Layout

<table>
<thead>
<tr>
<th>Work Order</th>
<th>Recommended Customizations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Arrange the fields.</strong> The default layout includes only some of the available fields.</td>
<td></td>
</tr>
<tr>
<td><strong>Confirm that your page layout has the desired related lists:</strong></td>
<td></td>
</tr>
<tr>
<td>- <strong>Child Work Orders:</strong> The work order's child work orders</td>
<td></td>
</tr>
<tr>
<td>- <strong>Object Milestones:</strong> Milestones on the work order (available only if entitlement management is set up)</td>
<td></td>
</tr>
<tr>
<td>- <strong>Products Consumed:</strong> Products used during the completion of the work order</td>
<td></td>
</tr>
<tr>
<td>- <strong>Product Requests:</strong> Products requested for the work order</td>
<td></td>
</tr>
<tr>
<td>- <strong>Product Request Line Items:</strong> Line items on product requests</td>
<td></td>
</tr>
<tr>
<td>- <strong>Products Required:</strong> Products needed to complete the work order</td>
<td></td>
</tr>
<tr>
<td>- <strong>Resource Preferences:</strong> Preferred, required, or excluded service resources on the work order</td>
<td></td>
</tr>
<tr>
<td>- <strong>Service Appointments:</strong> Appointments indicating when the work is scheduled</td>
<td></td>
</tr>
<tr>
<td>- <strong>Service Reports:</strong> Reports summarizing the work for customers</td>
<td></td>
</tr>
<tr>
<td>- <strong>Skill Requirements:</strong> Skills needed to complete the work order</td>
<td></td>
</tr>
<tr>
<td>- <strong>Time Sheet Entries:</strong> Schedule of mobile workers' time spent on the work order</td>
<td></td>
</tr>
<tr>
<td>- <strong>Work Order Line Items:</strong> Sub tasks or steps on the work order</td>
<td></td>
</tr>
<tr>
<td><strong>Optionally, add your own custom values to the Status picklist field. The Status field comes with these default values:</strong></td>
<td></td>
</tr>
<tr>
<td>- <strong>New</strong></td>
<td></td>
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<tr>
<td>- <strong>In Progress</strong></td>
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<tr>
<td>- <strong>On Hold</strong></td>
<td></td>
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<tr>
<td>- <strong>Completed</strong></td>
<td></td>
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<tr>
<td>- <strong>Cannot Complete</strong></td>
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<tr>
<td>- <strong>Closed</strong></td>
<td></td>
</tr>
<tr>
<td>- <strong>Canceled</strong></td>
<td></td>
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</tbody>
</table>

When you create a custom value, select a status category that the value falls into. The available status categories match the default status values. For example, if you create a 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?**

### Work Order Line Item

| **Arrange the fields.** The default layout includes only some of the available fields. |
| **Optionally, add your own custom values to the Status picklist field. The Status field is identical to the Status field on work orders.** |
| **Confirm that your page layout has the desired related lists:** |
| - **Child Work Order Line Items:** The line item's child line items |
| - **Product Request Line Items:** Line items on product requests |
| - **Product Requests:** Products requested for the line item |
Recommended Customizations

- Products Consumed: Products used during the completion of the line item
- Products Required: Products needed to complete the line item
- Service Appointments: Appointments indicating when the work is scheduled
- Service Reports: Reports summarizing the work for customers
- Skill Requirements: Skills needed to complete the line item
- Time Sheet Entries: Schedule of mobile workers’ time spent on the line item

Work Type

- Arrange the fields. The default layout includes only some of the available fields.
- Confirm that your page layout has the desired related lists:
  - Products Required: The products needed to complete the work. Work orders and work order line items inherit their work type’s required products.
  - Skill Requirements: The skills needed to complete the work. Work orders and work order line items inherit their work type’s skill requirements.

a. To let users view and manage work orders in a variety of places, add the Work Orders related list to any of the following objects’ page layouts.

- Accounts
- Assets
- Cases
- Contacts
- Entitlements
- Maintenance plans

Note: Before adding the related list, update the field-level security for the Maintenance Plan and Suggested Maintenance Date fields on work orders to make them available to users.

- Return orders
- Return order line items
- Service contracts

IN THIS SECTION:

How are Status Categories Used?
Service appointments, work orders, and work order line items have two status-related fields—Status and Status Category—which come with the same standard values. Status categories, which are referenced in many field service processes, allow you to use custom status values while maintaining a consistent work classification for tracking, reporting, and business process management.
How are Status Categories Used?

Service appointments, work orders, and work order line items have two status-related fields—Status and Status Category—which come with the same standard values. Status categories, which are referenced in many field service processes, allow you to use custom status values while maintaining a consistent work classification for tracking, reporting, and business process management.

When you create a custom Status value, 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.

View and manage status values in Setup by navigating to the Status field settings for service appointments, work orders, or work order line items.

Many field service triggers and processes are based on appointment, work order, or work order line item status. To ensure that these processes work as expected when custom statuses are in use, Salesforce references the Status Category field—rather than the Status field—before making changes.

The following field service processes are based on status category, rather than status. If you create custom status values or reference the Status or Status Category fields in custom apps, triggers, or validation rules, keep these in mind.

- Status-based sharing rules for work orders, work order line items, and service appointments
- Status-based paths on work orders, work order line items, and service appointments
- Dispatcher console appointment list filters
- Dispatch scheduled jobs, which are triggered by an appointment’s status category being updated to Dispatched
- Dispatch Chatter notification settings, which are triggered by an appointment’s status category being changed to Dispatched
- Dispatch drip feed—found in the Field Service Admin app > Field Service Settings tab > Dispatch—which dispatches one or more appointments when the assigned resource’s previous appointment’s status category changes from Dispatched or In-Progress to Canceled, Completed, or Cannot Complete
- Calendar syncing, which checks for appointments whose status category is Dispatched
- Completed icon on the dispatcher console map, which appears when an appointment’s status category changes to Completed
- KPI for completed service appointments shown on the Gantt, capacity view, and service resource view, which is based on appointments whose status category is Completed
Set Up Knowledge for Work Orders

Attach knowledge articles to work orders, work order line items, and work types to share guidelines and specs with mobile workers in the field. Learn how to customize page layouts to let your team view or manage attached articles, also known as linked articles.

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

1. Add the Articles related list to work order and work order line item page layouts.

2. Let Lightning Experience users manage attached articles. In Lightning Experience, add the Knowledge component to your work order, work order line item, and work type detail page layouts.

3. Let users view and modify attached articles from the console. In the layout editor for work orders and work order line items, select **Custom Console Components** and add the Knowledge One widget to the console sidebar.

4. The Knowledge One console widget suggests articles to attach based on key fields. Select the fields that suggestions are based on. (The Knowledge Lightning component doesn’t offer article suggestions.)
   a. In Setup, enter **Field Service** in the Quick Find box, then select **Field Service Settings**.
   b. Select the fields that the search engine should scan to suggest relevant articles from your knowledge base.
   c. Save your changes.

5. Optionally, customize linked article page layouts, fields, validation rules, and more in Setup.
   - In Lightning Experience, navigate to Linked Article in the Object Manager.
   - In Salesforce Classic, navigate to the Linked Articles page under Knowledge.

**Note:** Linked articles include the following limitations.

- Quick actions and global actions aren’t supported for linked articles.
- The Article widget and Feed Articles Tool aren’t available in the feed view.
- In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic. In the Salesforce mobile app, linked articles can’t be accessed from feed items.
- The Linked Work Types related list isn’t available on articles in any platform.
- The Knowledge One widget isn’t available on work types in the console. To manage linked articles on work types in the console, use the Articles related list.
- Linked articles are read-only in the Salesforce mobile app.
Set Up Path for Field Service

To guide your team as they complete field service jobs, add an interactive, color-coded progress bar to work orders, work order line items, and service appointments.

With Path, your team can quickly see a record’s status and how close it is to completion, and update the status by clicking the desired value on the path.

You can set up one path per record type. The steps in a path (1) correspond to the Status picklist values. Help users succeed by displaying up to five key fields and handy step-specific guidance beneath each path step (2).

Several statuses can represent the record’s conclusion: Canceled, Cannot Complete, Completed, and Closed. Therefore, the last stage of the path displays as Final Status when the record is open. Users are prompted to select a final status from these values when they try to close the record, and the path then shows the selected final status. The order of the path steps is based on the order of the values in the Status picklist, though statuses representing conclusion are grouped in the final step.

Path is available for work orders, work order line items, and service appointments in Lightning Experience and Experience Builder sites. It isn’t available in Salesforce Classic, the Salesforce mobile app, or the Field Service mobile app.
1. On the Path Settings page in Setup, enable Path. Select Remember User’s Path Preferences to let users decide whether the path remembers its previous state or is always closed when the page loads.

2. If you plan to create a path based on the Status field for a field service object, assign a status category to each status. From the field settings for the object’s Status picklist field in Setup, click Edit next to a value. Select the corresponding status category and save your changes. Status categories determine which statuses are grouped in the Final Status stage on the path, and are also used in scheduling.

3. From the Path Settings page in Setup, follow the prompts to create a path for the Work Order, Work Order Line Item, or Service Appointment object. Paths can be based on the Status field or a custom picklist. Optionally, select key fields or add guidance for each step in the path.

4. To add your path to record detail pages in your org, drag the Path component onto the object detail page in Builder.

5. To add your path to an Experience Builder site, drag the Path component onto the object detail page in Experience Builder.

Set Up Your Field Service Workforce

Create service resources and service crews to represent your mobile workforce. Then, assign permission sets to members of your team who work as dispatchers or support agents.

IN THIS SECTION:

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

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

Set Up Crew Management
Give admins and dispatchers access to a drag-and-drop service crew management tool where they can easily create service crews and update service crew membership.

Limit Access to Field Service Records
By default, all users can view and update work orders, work order line items, and service appointments. You can limit access to these records so that your team members see only the records that are relevant to them.
Create Service Resources for Field Service

### USER PERMISSIONS

<table>
<thead>
<tr>
<th>To create service resources:</th>
<th>Create on service resources</th>
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<tbody>
<tr>
<td>To deactivate service resources:</td>
<td>Edit on service resources</td>
</tr>
<tr>
<td>To view resource capacities:</td>
<td>Read on service resources</td>
</tr>
<tr>
<td>To create, update, or delete resource capacities:</td>
<td>Edit on service resources</td>
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<tr>
<td>To view service resource skills:</td>
<td>Read on service resources</td>
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<tr>
<td>To create, update, or delete service resource skills:</td>
<td>Edit on service resources</td>
</tr>
<tr>
<td>To view, create, edit, or delete resource absences:</td>
<td>Read on service resources AND Edit on service resources</td>
</tr>
<tr>
<td>To delete resource absences:</td>
<td>Edit on service resources</td>
</tr>
</tbody>
</table>

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

**Tip:** If the Field Service managed package is installed, you can use Guided Setup to quickly create service resources and assign them the proper permission sets. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab. Click Go to Guided Setup > Create Service Resources and follow the guidance to update or create service resources.

1. From the Service Resources tab, click New.
2. Select a user and enter a resource name—typically, the user’s name.
3. If the resource represents an individual user, select the user in the User field. If the resource represents a service crew, leave the User field blank and select the crew in the Service Crew field. Service resources must list a user or a service crew.
4. Select Active to be able to assign the resource to service appointments. Inactive resources also can’t access the Field Service mobile app.
5. Indicate whether the resource is a technician (a mobile worker), dispatcher, or crew.

**Note:** Field Service users can see Asset as a picklist option in the Resource Type field. However, you can’t save the record when you select Asset in an org that doesn’t have access to Lightning Scheduler.

Resources who are dispatchers can’t be capacity-based, included in schedule optimization, or added to service crews. Only users with the Field Service Dispatcher permission set license can be dispatchers.

6. Enter a location if applicable. Service resources might be linked to a location if they manage or operate the location (such as a warehouse or van). A location can’t be linked to more than one service resource.
7. Select Capacity-Based if the resource is limited to working a certain number of hours or appointments in a specified time period. You can define the resource’s capacity in the Capacities related list. Contractors are likely capacity-based.
8. Select Include in Scheduling Optimization to check if the resource has the permission set license needed for optimization. To be included in optimization, users need the Field Service Scheduling permission set license.
9. Complete the remaining fields as needed, and save your changes.

Once a resource is created, add details in their related lists.

**Service Territories**
Select the territories where the resource is available to work. For each territory, select a type:

- **Primary**: (One territory) Where the resource works most often—for instance, near their home base.
- **Secondary**: (One or more territories) Where they can be assigned to appointments if needed. Secondary territory membership dates can overlap.
- **Relocation**: (One or more territories) Represents a temporary move.

**Skills**
Assign skills to indicate the resource's areas of expertise. Optionally, enter a skill level of 0–99.99.

Try to track only skills that factor into scheduling decisions. For example, don't include skills that are common among all service resources. Aim to assign fewer than 50 skills to each service resource.

**IN THIS SECTION:**
- **Define a Service Resource’s Capacity**
  Typically, contractors in field service can work a specified amount in a given time period. Define a service resource’s capacity so they aren’t overbooked during schedule optimization.

- **Estimate a Service Resource’s Efficiency**
  People work at different paces depending on their skills and level of experience. Assign an efficiency score to service resources to facilitate scheduling. The scores are considered during scheduling and can affect an appointment’s scheduled end time.

- **Guidelines for Creating Service Resources for Field Service**
  Learn how to view, create, and manage service resources to keep your field service operation running smoothly.

- **Guidelines for Setting Up Field Service Contractors**
  If you run a field service operation, it’s likely that you work with contractors in addition to your full-time employees. Learn how to incorporate contractors into your field service processes.

**Define a Service Resource’s Capacity**

Typically, contractors in field service can work a specified amount in a given time period. Define a service resource's capacity so they aren’t overbooked during schedule optimization.

1. To indicate that a service resource is capacity-based, select **Capacity-Based** on the resource record and save your change.

2. In the Capacities related list, click **New Resource Capacity**.

3. Enter the capacity start and end dates—for example, enter the resource's contract dates.

4. Specify how much the resource can work.
   - Select the time period that the capacity is based on. For example, if the resource can work 80 hours per month, select **Month**.
   - To base the resource’s capacity on the number of hours worked, enter the hours per time period. For example, if the resource can work 80 hours per month, enter **80**.
   - To base the resource’s capacity on the number of service appointments assigned to them, enter the work items per time period. For example, if the resource can complete 20 appointments per month, enter **20**.

5. Save your changes. You can create multiple capacities for a resource as long as the start and end dates don’t overlap.
Tip: If the Field Service managed package is installed, view and update a service resource’s capacity on the Capacity tab on the service resource detail view.

Considerations

- If the managed package is installed, capacity-based resources must include a Hours per Time Period value on their capacity record. If the user’s capacity should be measured in work items, fill out Work Items per Time Period as well and set the Hours per Time Period to a high number which likely won’t be achieved.
- The Fix Overlaps feature isn’t support for capacity-based service resources.
- Schedule optimization respects daily capacity, but not weekly or monthly.
- Resource schedule optimization—the optimization of an individual service resource’s schedule—isn’t supported for capacity-based service resources.
- If a service resource is capacity-based with a defined capacity, their utilization percentage isn’t shown in the Gantt.
- Capacity-based resources can’t be assigned to appointments that have a scheduling dependency.
- Capacity-based resources can’t be relocated or assigned to a secondary service territory.

Estimate a Service Resource’s Efficiency

People work at different paces depending on their skills and level of experience. Assign an efficiency score to service resources to facilitate scheduling. The scores are considered during scheduling and can affect an appointment’s scheduled end time.

This is a Field Service managed package feature.

In the Efficiency field on a service resource record, enter a value from 0.1 through 10. An efficiency of 1 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.

During schedule optimization, the following formula is used to estimate the time that a mobile worker needs to complete an appointment: 

\[
\text{Duration} / \text{Efficiency} = \text{Actual time to perform an appointment}
\]

Tip: To give preference to highly efficient service resources in schedule optimization, create a Resource Priority service objective based on the service resource Efficiency field.

Example: The estimated duration on the Battery Replacement work type is 60 minutes.

- Alexander, an expert, has an efficiency of 2.0. If Alexander is assigned to a Battery Replacement appointment, the appointment is scheduled to end 30 minutes after the scheduled start (60/2=30).
- Jane, a mobile worker, has an efficiency of 1.0. If Jane is assigned to a Battery Replacement appointment, the appointment is scheduled to end 1 hour after the scheduled start (60/1=60).
- Janice, a junior worker, has an efficiency of 0.5. If Janice is assigned to a Battery Replacement appointment, the appointment is scheduled to end 2 hours after the scheduled start (60/0.5=120).
Guidelines for Creating Service Resources for Field Service

Learn how to view, create, and manage service resources to keep your field service operation running smoothly.

View Service Resources
View service resources on the Create Service Resources page in Guided Setup or the Service Resources tab. In addition:

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

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

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

Assign Service Resources to Service Appointments
Manually assign a resource to a service appointment from the Assigned Resources related list on the appointment detail page. You can assign multiple resources to an appointment. Optionally, indicate which service crew a service resource belongs to in the Service Crew field on the assigned resource record.

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

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

Service resources that belong to service crews can’t be deactivated. If you deactivate a service resource, make sure to update records that were associated with that resource. For example, if a deactivated service resource was a required resource for an account, update that account to prevent scheduling issues.

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

View Service Resource Schedules
The Service Appointments related list shows all appointments that a resource is assigned to, while the Absences related list shows define periods of time when the resource is unavailable to work. The Service Resource Availability work rule type ensures that resources aren’t assigned to appointments when they’re absent. Otherwise, resources can be manually assigned to appointments that conflict with their absences.

Tip: Create a trigger that sends an approval request to a supervisor when a resource creates an absence.
Guidelines for Setting Up Field Service Contractors

If you run a field service operation, it’s likely that you work with contractors in addition to your full-time employees. Learn how to incorporate contractors into your field service processes.

Get Set Up

The way you track contract work in Salesforce depends on how you want to track capacity, assign appointments, and exchange data with contractors. Follow these basic steps to add contractors.

Create an account and contacts
Create an account that represents the contractor such as Solar Installation Contracting. Then create contacts linked to the account. Create at least one contact for the contractor manager. If other contractors need access to Experience Builder sites, create contacts for each user.

Set up access and permissions
Depending on the licenses that your organization purchased, you can assign contractors the Customer Community Plus or Partner Community license. If both license types are available, partner licenses are ideal for users who are engaged in sales or distribution with your company. Community licenses are required to access Experience Cloud sites.

Assign the Field Service Scheduling permission set license so that the user can be included in scheduling. Assign the Field Service Mobile permission set license to users that need access to the Field Service mobile app. Then, create a user profile for contractors (recommended) and configure their object permissions.

Tip: To customize contractors’ mobile app experience, assign a unique mobile settings configuration—accessible from the Field Service Mobile Settings page in Setup—to the contractor user profile.

Create service resources and service territories
You can create service resources for every contractor worker or just for the contractor manager. Each service resource is linked to a user—in this case, the contractors at your partner organization.

Create a service territory for each contractor company, and add the contractor service resources as service territory members. Creating a contractor-specific territory lets the contractor manager see only their employees in the dispatcher console. For example, if you’re contracting with Ursa Major Solar, create a territory named Ursa Major Solar Contracting.

Provide access to the dispatcher console
To let the manager dispatch appointments, add the dispatcher console to your Experience Builder site. For help, see Add the Dispatcher Console to an Experience Builder Site.

Note: Field Service contractor licenses can only be used by third-party contractors. They can’t be assigned to internal employees.

Assign Service Appointments to Contractors

Ready to assign a work order to your contractor team? You’ve got options! Here are two common approaches to assigning work to contractors.

Tip: The Contractors list view in the dispatcher console Service Appointment List shows only service appointments that are assigned to capacity-based service resources.

Contractors are service resources
In this example, the contract manager is an Experience Cloud site user but not a service resource. The contracting mobile workers are service resources with Field Service Mobile licenses.

This approach is best for you if it’s important for the scheduling engine to consider each worker’s schedule when making assignments. And you want contractor workers to view and update appointment details in the field, so you store individual worker details in Salesforce.
In this model, your process looks like this:

1. The dispatcher shares the work order with the contractor manager.
2. In your site, the contractor manager uses the Book Appointment action to assign the associated service appointment to a mobile worker.
3. The mobile worker uses the mobile app. They can view their assignments and update the service appointment and work order status when the work is complete.

**Contractor managers are service resources**

In this example, the contractor manager is an Experience Cloud site user and a service resource. But the contractor manager tracks individual contracting mobile workers in a separate system.

This approach works best when you don’t want to track individual worker details in Salesforce. The contractor manager is responsible for viewing and updating appointment details in the field. And you don’t need the scheduling engine to assign work based on different schedules for each contractor worker.

When you use this model, your process looks like this:

1. The dispatcher assigns the service appointment to the contractor manager using their service resource record.
2. The contractor coordinates with the contractor team to complete the work.
3. After the service appointment is completed, the contractor updates the service appointment and work order status from your site.

**Create Service Crews**

**USER PERMISSIONS**

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<th>To create service crews:</th>
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<td>Create on service resources</td>
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<td>To assign service crews to service appointments:</td>
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<td>To view service crew members:</td>
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<tr>
<td>To create, update, or delete service crew members:</td>
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</table>

**EDITIONS**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

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

From the Crew Management Tool

1. Open the crew management tool by clicking the Crew Management tab or opening the Lightning page that contains it.
   
   ![Note: Not sure how to get to the crew management tool? Ask your admin to follow the steps in Set Up Crew Management and let you know where the tool is located.]

2. Click New Service Crew to open the crew wizard.

3. Complete the fields on the Basics tab.

4. Optionally, add skills to the crew on the Skills tab. For example, perhaps the crew you’re creating must always include someone with the Welding skill. Adding skills makes it easier to find potential crew members with the skills you need.

5. Select a leader on the Crew Leader tab.

6. Save your crew. This creates an active service resource of type Crew that’s used during scheduling. You can now view the crew in the crew management tool and add members to it.

From the Service Crews Tab

1. Customize page layouts to support crew features.
   
   a. Update the field-level security settings of the Service Crew field on service resources so it’s not hidden. Then, add the field to service resource page layouts and check that the User field is not marked as required. This lets you create service resources that represent service crews so crews can be assigned to service appointments.

   ![Note: Though the User and Service Crew fields won’t be marked required in the UI, service resource records can’t be saved unless one of the fields is filled out.]

   b. Update the field-level security settings of the Gantt Label field on service crew members so it’s not hidden. Then, add the field to the Service Crew Member page layout.
2. From the Service Crews tab, click New.
3. Enter a crew name and ideal size, and save your changes.
4. Add service resources to the crew from the Service Crew Members related list. You can specify start and end dates for members and flag the crew leader.
5. Create a service resource to represent the crew, which is required for scheduling. Changing a crew’s members doesn’t affect its service appointment assignments.
   a. From the Service Resources tab, click New.
   b. Enter a name for the crew.
   c. Leaving the User field blank, select the crew in the Service Crew field.
   d. Select a Resource Type of Crew.
   e. Select Active to be able to assign the crew to service appointments and manage its membership with the crew management tool. Service resources of type Crew can’t be activated unless the crew has at least one active member.
   f. Skip the optimization option, which doesn’t apply to service crews.
   g. Save your changes.

IN THIS SECTION:
Considerations for Scheduling Service Crews
Service crews, much like individual service resources, can be assigned to service appointments. Learn how absences, efficiency, and crew settings affect service crew scheduling.

Considerations for Scheduling Service Crews
Service crews, much like individual service resources, can be assigned to service appointments. Learn how absences, efficiency, and crew settings affect service crew scheduling.

This is a Field Service managed package feature.

Absences
If a service resource of type Crew has resource absences, those absences are considered in scheduling. Absences associated with individual crew members’ corresponding service resources aren’t considered.

Appointment Assignments
Service appointments can be assigned only to service resources. Therefore, to assign a crew to a service appointment, you need a service resource of type Crew that represents the crew. If you create your crew from the crew management tool, this resource is created automatically. Otherwise, follow the steps in Create Service Crews.

When an appointment is assigned to a service crew, the appointment gains these assigned resources:

- The service resource of type Crew
- The service resources of type Technician who are active service crew members during the appointment time

The appointment’s assigned resources are refreshed only when the appointment is dispatched or assigned to a different crew. Changing the appointment date doesn’t refresh the assigned resources.

If you want appointments that don’t require crews to be assigned only to individual service resources, use the Resource Priority service objective in your scheduling policy. Give your mobile workers a lower priority so the scheduler prefers to assign work to them.
To prohibit the scheduling of all appointments to crews, assign a “No Crew” skill to your individual service resources. Then, add this skill as requirement to the work type, work order, or work order line item in question.

Capacity
Capacity-based scheduling isn’t supported for service crews because a service resource of type Crew can’t be capacity-based.

Efficiency
When an appointment is scheduled to a crew, the Crew Efficiency field on the crew’s service resource is used to calculate the appointment’s Scheduled End. The crew members’ efficiencies aren’t considered.

Geolocation Tracking and Service Territories
- The Last Known Location is tracked for crew leaders only. If a crew has more than one leader, the most updated location is displayed on the map.
- If a service resource is relocated to another service territory while they belong to a crew, the service resource membership record is drawn only on the relocation territory.
- The service resource representing the service crew is the home base considered by Field Service while belonging to the crew.
- Travel calculation follows the service territory or the service territory member’s address of the service resource representing the service crew.

Membership Requirements
- Only active service resources of the Technician resource type can be added to crews.
- To belong to a crew, a service resource needs service territory membership in the territory where the crew provides service. The time span of service crew membership must match or be fully contained in the time span of the service resource of type Technician service territory membership.
- A service resource can be a member of multiple crews as long as the membership dates don’t overlap.
- Service resources that belong to a service crew don’t receive notifications about assignments or assignment changes. Assignment notifications are sent only to service resources that are assigned individually to appointments.
- Removing all members from a service crew deactivates the related service resource of type Crew.

Minimum Crew Size
Work orders, work order line items, and work types come with a Minimum Crew Size and a Recommended Crew Size. For example, a crew might have a recommended size of 3, but a minimum size of 2. Work orders and work order line items inherits their work type’s crew size settings.

Note: The crew size fields are hidden for all users by default. If you don’t see them, update their field-level security settings in Setup.

Field Service doesn’t consider the Recommended Crew Size when assigning appointments. To determine whether a service crew fits the minimum crew size requirement for an appointment, the scheduling engine either counts the crew’s service crew members or checks the Service Crew Size field on the Service Crew record. You can adjust these settings on the Service Crew Resources Availability work rule. If the Minimum Crew Size is blank or 1, the scheduler may assign the work to mobile workers or to crews.

You can customize the Service Crew Resources Availability work rule to serve one of two purposes:
- Compare a service appointment parent record’s Minimum Crew Size field to the Crew Size field on the service crew.
- Compare a service appointment parent record’s Minimum Crew Size field to the actual number of allocated service crew members at the time of the assignment. Consider Service Crew Membership must be selected on the Service Crew Resources Availability work rule.

If the Minimum Crew Size is blank or 1 on the service appointment’s parent record, all service resources (of either the Crew or Technician type) are considered as candidates. This is also true for optimization, although a crew isn’t a candidate if it has no valid crew members and Consider Service Crew Membership is selected on the Service Crew Resources Availability work rule.

If your org was created before Spring ’18, you must create this work rule and add it to your scheduling policies.
Multiday Appointments
When a multiday appointment is scheduled for a worker whose start date on a service crew is in the future, the multiday appointment is elongated to last the duration of the worker’s membership in the service crew.

Resource Notifications
Service crew members assigned to a service appointment aren’t automatically made followers when the service appointment is dispatched. Only one assigned resource can be set to automatically follow a dispatched service appointment. If you want all the crew members to be followers, follow the steps in Customize Push Notifications for the Field Service Mobile App. Using custom push notifications enables getting multiple notifications for different users based on an event, such as dispatching a service appointment.

Resource Preferences
Service resources that belong to a crew can’t be candidates for appointments while they belong to a crew. Therefore, the Required Resource and Excluded Resource work rules and the Preferred Resource service objective don’t apply to active service crew members.

Scheduling Candidates
When the scheduler is looking for candidates to perform a job, only service resources of type Crew and Technician are considered as candidates. If a service resource is a current member of a service crew, the resource isn’t considered as a candidate. If a service resource is manually assigned to a service appointment while they belong to a crew, the dispatcher console shows a rule violation.

Sharing
When a service appointment is dispatched, members of the assigned service crew get Read access to the appointment and its parent record and the crew leader gets Read/Write access. If the Field Service managed package isn’t installed, service crew leaders don’t receive any extra permissions.

If an appointment’s Scheduled Start changes or an assigned resource of type Crew is updated, the appointment’s assigned resources are refreshed to keep the sharing settings current. A change in a service crew membership record doesn’t trigger the refresh.

Skills
Skills can be assigned to service resources of any type—Technician or Crew—and are considered during scheduling. Unless skills are assigned to a service crew directly on the service resource of type Crew, a service crew’s combined skills aren’t considered and the crew may be under-scheduled.

If you want the scheduling engine to consider a service crew’s combined skills—that is, all skills assigned to the service crew members—enable skill grouping. This way, if an appointment requires Drilling and Installation skills, a service crew that has members with that group of skills is considered as a candidate.

From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab. On the Scheduling tab, select Enable resource crew skill grouping and save your changes.

Note:
- When skill grouping is enabled, the scheduling engine calculates the crew’s skill set for that time slot. The skill set is recalculated each time the scheduling engine searches for appointment candidates because it can change based on crew member allocations and skills that expire. For example, if a resource skill requires recertification every six months, the scheduling engine considers crew members with the skill while their certifications are valid.
- If multiple members of a service crew have the same skill, the scheduling engine considers the highest skill level when calculating the crew’s combined skill set.

Utilization
When utilization is calculated for the utilization view and metrics shown in the dispatcher console, a service crew member is considered to be utilized like the service resource representing the crew they belong to.
Set Up Crew Management

Give admins and dispatchers access to a drag-and-drop service crew management tool where they can easily create service crews and update service crew membership.

This is a Field Service managed package feature.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

USER PERMISSIONS

To create Visualforce tabs:
- Customize Application

To set Visualforce page security and create permission sets:
- Manage Profiles and Permission Sets

To assign permission sets:
- Assign Permission Sets

1. Decide which users need access to the crew management tool. Ensure that each user has at least one of these permission sets:
   - FSL Admin Permissions
FSL Dispatcher Permissions

2. Add the crew management tool to your org in one of two ways:
   • Create a Visualforce tab named Crew Management for the FSL.CrewManagement page.
   • Embed the Crew Management custom Lightning component in a Lightning page. Because the component includes a detailed chart, give it plenty of space on the page.

3. Create a permission set with access to the following elements, and assign it to the relevant users.
   • Crew Management tab, if you created one
   • FSL.CrewManagement Visualforce page
   • FSL.CrewsResourceLightbox Visualforce page
   • FSL.CrewsSaLightbox Visualforce page
   • FSL.CrewsWorkorderLightbox Visualforce page
   • FSL.CrewsWorkorderLineItemLightbox Visualforce page
   • FSL.CrewManagement Apex class

You’re all set! For help using crew management, see Manage Service Crew Membership.

Limit Access to Field Service Records

By default, all users can view and update work orders, work order line items, and service appointments. You can limit access to these records so that your team members see only the records that are relevant to them.

This is a Field Service managed package feature.

1. Set sharing to Private for work orders, work order line items, and service appointments.
   a. In Setup, enter Sharing Settings in the Quick Find box, and click Sharing Settings.
   b. Click Edit.
   c. In the Default Internal Access column, select Private for the objects that you want to limit access to.

   Note: If you want to share dispatched service appointments to Experience Cloud site users when Default Internal Access is Private or Public Read Only, set Default External Access to Private or Public Read Only also. If the Default Internal Access setting is Public Read Write, Experience Cloud site users can see dispatched appointments only if the external setting is Public Read Write and you enable dispatch sharing to resources.

   d. Save your changes.

2. Set up sharing settings for dispatchers. For a dispatcher to access the service resources and service appointments in a territory, they must be a member of the public group for that territory.
   a. From the App Launcher, find and open User Territories.
   b. Click New.
   c. Select a service territory.
   d. Select the user you want to add as a member of that territory’s public group.
Note: User territories give users access to the following objects for that territory.

- Resource Absences
- Service Appointments
- Service Resources
- Service Territories
- Parent objects of shared Service Appointments; for example, Accounts, Assets, Opportunities, Work Orders, and Work Order Line Items

3. Set up sharing settings for service resources. These settings allow dispatchers to control access to the appointment and its related information until they've finalized the appointment’s details.

   a. From Setup, enter Field Service Settings in the Quick Find box, then click Field Service Settings.

   b. Select any of the following options. Hover over a setting’s information icon for details.

      - Share dispatched service appointments with their assigned resources
      - Share service appointments’ parent work orders with their assigned resources
      - Let service crew members edit their service appointments

   c. Save your changes.

   Note: When a service resource is removed from a service appointment, sharing is deleted only for that service appointment. Sharing on the parent work order is still retained.

4. Because record access needs can change, Field Service regularly checks that users have access to the right records. After your service resources are assigned to service territories, confirm that this sharing update process is active.

   a. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.

   b. Select Sharing > Scheduled Jobs.

   c. Expand the User Territories scheduled job, and confirm that Active is selected.

   d. Select which territories to check sharing for, and configure the job frequency.

   Tip:
   - Limit each job to fewer than 100 territories.
   - If territory membership changes frequently, try a frequency of 1 day. If territory membership is generally static, you can decrease the frequency to 30 days, for example.

   e. Enter time horizon information.

      - The time horizon determines how long the resource appears in the Gantt resource list after their territory membership ends. For example, enter 7 so that dispatchers can see the resource’s work in the previous week’s schedule on the Gantt.
      - The backwards time horizon determines how far in advance a new resource appears in the Gantt resource list. For example, enter 2 to show the resource in the resource list two days before their territory membership starts.

   f. Save your changes.

   g. To immediately update the sharing rows, click Run Now.
Note:

- When an appointment is canceled, it’s visible only to the appointment owner and the relevant dispatchers based on the user territory object.
- You can give dispatchers access to records by sharing information across territories and syncing calendars to include absences and other events.
- In some orgs, the Field Service Admin app has similar sharing options. We recommend disabling the app sharing settings and using the Setup settings.
- When User Territory Sharing is enabled and the option **Automatically populate user groups based on User Territory** is selected, the User Territory Apex Rule does the following.
  - If you create a service territory, it creates a public group with the same name. The public group is added to ServiceTerritoryShare object.
  - If you create a user territory record, it adds the user to the public group for that service territory.
  - If you create a service appointment with that service territory, the public group is added to the ServiceAppointmentShare object to grant access to the record.
  - When a service appointment with that territory is shared, related parent records (such as Accounts, Assets, Opportunities, Work Orders, and Work Order Line Items) are also shared. The service appointment record and its parent record are shared with the associated public group and its users. If the parent record of the appointment is a Work Order Line Item, the associated Work Order is also shared. Optionally, in Field Service Settings under Sharing > Scheduled Jobs, select which parent objects are shared when an appointment is shared. For example, to share Work Orders but not Accounts, check Share parent Work Order when Service Appointment is shared and deselect Share parent Account when Service Appointment is shared.

If you don’t have User Territory Sharing enabled or sharing settings weren’t private when you created the service territory records, you must manually create the sharing records.

- Public group names must be unique. For example, User Territory Sharing doesn’t work if you have a queue with the same name as one of your public groups.
- When a service appointment is created without a user territory, it’s associated with the Field Service Default public group. This default group allows a user to access a service appointment and work order even when there’s no associated territory. Field Service adds users in all user territories as members of this public group. If you’re a dispatcher, you can filter the Gantt and show service appointments that aren’t associated with a territory.

**Example:** John is a dispatcher for the New Jersey service territory, and his user territory record gives him access to New Jersey field service records. Madison is a mobile worker for the Pennsylvania service territory, but on August 1 she’s moving to the New Jersey territory.

To reflect Madison’s move, the admin adds an end date of July 31 to her Pennsylvania service territory member record. The admin then creates a New Jersey service territory member record for Madison with a start date of August 1.

The admin has configured the User Territory sharing job to run daily for all service territories, including Pennsylvania and New Jersey. This job calculates which records users need access to. Because the job’s backwards time horizon is set to one day, John receives access to Madison’s field service records one day before she starts work in New Jersey.
Set Up Your Field Service Inventory

Track and manage the storage, request, transfer, and consumption of every item in your inventory, and ensure that your mobile workforce has the right parts in stock to do their job.

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

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

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

IN THIS SECTION:

- **Customize Inventory Settings**
  To control how your team manages inventory, customize page layouts and assign user permissions.

- **Create Inventory Locations for Field Service**
  Locations are places, like warehouses, customer sites, or work vehicles, where inventory is stored for a field service operation. Create locations so you can track the items stored there and restock when necessary.

- **Create Product Items to Represent Inventory**
  After you customize your field service inventory settings, track where your inventory is stored by creating product items.
Customize Inventory Settings

To control how your team manages inventory, customize page layouts and assign user permissions.

1. Assign user permissions.

<table>
<thead>
<tr>
<th>Users Who Will…</th>
<th>Need These Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Field Service</td>
<td>Customize Application</td>
</tr>
<tr>
<td>View the Locations, Products, Product Items, Product Requests, Product Transfers, Return Orders, or Shipments tab and records</td>
<td>Read on the object</td>
</tr>
<tr>
<td>Create, edit, or delete locations, products, product items, product requests, product transfers, return orders, or shipments</td>
<td>Create, Edit, or Delete on the object</td>
</tr>
<tr>
<td>Add products required to work orders, work order line items, or work types</td>
<td>Edit on work orders, work order line items, or work types</td>
</tr>
<tr>
<td>Create, edit, or delete products consumed on work orders or work order line items</td>
<td>Create on work orders AND Read on product items</td>
</tr>
<tr>
<td>View product item transactions</td>
<td>Read on product items</td>
</tr>
<tr>
<td>Edit product item transactions</td>
<td>Edit on product items</td>
</tr>
<tr>
<td>Create addresses for locations</td>
<td>Create on Addresses</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Page Layout</th>
<th>Recommended Customizations for Inventory Management</th>
</tr>
</thead>
</table>
| Location | • Arrange the fields.  
  **Important:**  
  – Add the Inventory Location field so you can track where inventory is stored.  
  – Add the Mobile Location field so you can flag mobile locations such as service vehicles.  
  – If you plan to create location hierarchies, add the Parent Location field, and optionally the read-only Root Location and Hierarchy Level fields.  
  – Optionally, customize the values in the Location Type field. Its out-of-the-box values are Warehouse, Van, Site, and Plant.  
  • Confirm that your layout includes the desired related lists:  
  – The Addresses related list shows addresses related to the location, such as billing and shipping addresses.  
  – The Assets related list shows assets at the location. |
<table>
<thead>
<tr>
<th>Page Layout</th>
<th>Recommended Customizations for Inventory Management</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>– The Associated Locations related list shows related accounts.</td>
</tr>
<tr>
<td></td>
<td>– The Child Locations related list shows locations within the location, such as vehicles which are parked at a warehouse when not in use.</td>
</tr>
<tr>
<td></td>
<td>– The Maintenance Plans related list shows maintenance plans linked to the location.</td>
</tr>
<tr>
<td></td>
<td>– The Product Items related list shows product items (inventory) stored at the location.</td>
</tr>
<tr>
<td></td>
<td>– The Product Transfers (Source) related list shows product transfers that originated at the location.</td>
</tr>
<tr>
<td></td>
<td>– The Product Transfers (Destination) related list shows product transfers in which items were transferred to the location.</td>
</tr>
<tr>
<td></td>
<td>– The Service Territory Locations related list shows related service territories, which usually indicates that the location is within the territory.</td>
</tr>
</tbody>
</table>

**Address**

- Arrange the fields, which appear in the Addresses related list on locations.
- Optionally, customize the values in the Address Type field. Its default values are Mailing, Shipping, Billing, and Home.

**Associated Location**

Associated locations let you associate multiple accounts with one location. For example, a shopping center location may have multiple customer accounts.

- Arrange the fields, which appear in the Associated Locations related list on locations and accounts.

**Product**

- Confirm that your layout includes the following related lists:
  - The Product Items related list shows product items that track the storage of the product in an inventory location.
  - The Return Order Line Items shows return order line items that track the return or repair of the product.

- Define values for the Quantity Unit of Measure picklist field, which comes with one value (Each). These values are reflected in the Quantity Unit of Measure field on product items, product request line items, product transfers, products consumed, and products required.
  a. From Setup, enter Products in the Quick Find box, then select Fields under Products.
  b. Click Quantity Unit of Measure.
  c. In the Quantity Unit of Measure Picklist Values related list, click Edit to change the default or New to add values. For example, you may need values like Kilograms or Liters.
  d. Save your changes.

**Product consumed**

Arrange the fields that appear in the Products Consumed related list.

**Product item**

- Arrange the fields.
- Confirm that your layout includes the following related lists.
  - The Product Item Transactions related list automatically tracks the replenishment, consumption, and adjustment of product items.
  - The Product Transfers related list shows transfers of the inventory.
<table>
<thead>
<tr>
<th>Page Layout</th>
<th>Recommended Customizations for Inventory Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product item transaction</td>
<td>Arrange the <strong>fields</strong> that appear in the Product Item Transactions related list.</td>
</tr>
</tbody>
</table>
| Product request          | • Arrange the **fields**.  
                          • Optionally, customize the Status field values. The default values are Draft, Submitted, and Received.  
                          • Confirm that your layout includes the following related lists:  
                          − The Product Transfers related list shows transfers that are created to fulfill the request.  
                          − The Product Request Line Items related list shows the request’s line items (each associated with a product).  
                          − The Return Orders related list shows return orders associated with the request. |
| Product request line item| • Arrange the **fields**.  
                          • Optionally, customize the Status field values. The default values are Draft, Submitted, and Received.  
                          • Confirm that your layout includes the following related lists:  
                          − The Product Transfers related list shows transfers created to fulfill the request.  
                          − The Return Order Line Items related list shows return order line items associated with the product request line item. |
| Product required          | Arrange the **fields** that appear in the Products Required related list.                                                                                                               |
| Product transfer         | • Arrange the **fields**. The default layout includes only some of the available fields.  
                          • Optionally, customize the Status field values. The default values are Ready for Pickup and Completed.  
                          • Confirm that your layout includes the Product Item Transactions related list, which automatically tracks the replenishment, consumption, and adjustment of the product items being transferred. |
| Return order             | • Arrange the **fields**.  
                          • Confirm that your layout includes the following related lists:  
                          − The Product Transfers related list shows product transfers related to the return  
                          − The Return Order Line Items related list shows subdivisions of the return, each associated with a specific product  
                          − The Work Orders related list shows work orders related to the return  
                          − The Work Order Line Items related list shows work order line items related to the return |
| Return order line item   | • Arrange the **fields**.  
                          • Confirm that your layout includes the following related lists:  
                          − The Product Transfers related list shows product transfers related to the return  
                          − The Work Orders related list shows work orders related to the return  
                          − The Work Order Line Items related list shows work order line items related to the return |
| Shipment                 | • Arrange the **fields**.  
                          • Optionally, customize the Status field values. The default values are Shipped and Delivered.                                                                                     |
### Recommended Customizations for Inventory Management

<table>
<thead>
<tr>
<th>Page Layout</th>
<th>Recommended Customizations for Inventory Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work order</td>
<td>• Confirm that your layout includes the following related lists.</td>
</tr>
<tr>
<td>Work order line item</td>
<td>• The Products Required related list shows products needed to complete the work.</td>
</tr>
<tr>
<td></td>
<td>• The Products Consumed related list shows product items used to complete the work.</td>
</tr>
<tr>
<td></td>
<td>• The Product Requests related list shows product requests created to ensure that the assigned service resources have the parts they need to complete the work.</td>
</tr>
<tr>
<td></td>
<td>• The Product Request Line Items related list shows product request line items associated with the work.</td>
</tr>
<tr>
<td></td>
<td>• The Return Orders related list shows return orders associated with the work.</td>
</tr>
<tr>
<td></td>
<td>• The Return Order Line Items related list shows return order line items associated with the work.</td>
</tr>
</tbody>
</table>

---

3. Make the following tabs visible to your users:
   - Locations
   - Products
   - Product Items
   - Product Requests
   - Product Request Line Items
   - Product Transfers
   - Return Orders
   - Shipments

   You can add the tabs to a custom app or instruct users to add them in Salesforce.

---

### Create Inventory Locations for Field Service

**USER PERMISSIONS**

<table>
<thead>
<tr>
<th>Action</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>To create locations:</td>
<td>Create on locations</td>
</tr>
<tr>
<td>To view associated locations:</td>
<td>Read on accounts</td>
</tr>
<tr>
<td>To create, update, or delete associated locations:</td>
<td>Edit on accounts</td>
</tr>
<tr>
<td>To view addresses:</td>
<td>Read on locations</td>
</tr>
<tr>
<td>To create, update, or delete addresses:</td>
<td>Edit on locations</td>
</tr>
</tbody>
</table>

**EDITIONS**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

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

1. From the Locations tab, click **New**.
2. Enter a location name.

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

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

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

6. Complete the other **fields** as appropriate.

7. Click **Save**.

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

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

10. In the Service Territory Locations related list, create records to indicate which service territories the location belongs to. Service territory locations are warehouses, customer sites, or vehicles that are located or operate in the service territory.

### Create Product Items to Represent Inventory

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

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

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

- **If you assign a serial number, each product item represents a single item in your inventory:** for example, create one product item representing a motor with serial number 012345 stored at Warehouse A. Before serializing product items, review the Inventory Management limitations in **Field Service Limits and Limitations**.
- **If you choose not to assign serial numbers, you can specify a quantity on each product item.** Product item quantities auto-update to reflect transfers between locations. Create one product item for every location that has the product in stock. For example, create:
  - One product item representing 100 batteries stored at Warehouse A
  - One product item representing 15 batteries stored in Service Van 1

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

2. Use the lookup field to select a product.

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

3. Use the lookup field to select the location where the product item is stored. Only locations that have the **Inventory Location** option selected can be associated with product items.
4. Enter the Quantity on Hand, which is the amount at this location. If you intend to add a serial number, this value will likely be 1.

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

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

7. Click **Save**.

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

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

---

**Get Ready for Scheduling**

Define your service appointment life cycle, configure appointment booking settings, and get to know your Field Service scheduling policies, optimization settings, and sharing settings.

This is a Field Service managed package feature.

---

**IN THIS SECTION:**

*Customize the Service Appointment Life Cycle*

A service appointment life cycle shows the sequence of stages that a service appointment passes through. The life cycle starts when the appointment is created and ends when it reaches its final status.

*Customize Appointment Booking Settings*

Users can schedule service appointments for a work order, work order line item, or other record by using the **Book Appointment** Chatter action. Customize this scheduling experience from the Field Service Admin app.

*Reserve Time Slots for Designated Types of Work*

Create specific time slots dedicated to service appointments that meet your criteria.

*Set Up Routing for Travel Time Calculations*

Field Service uses aerial routing to estimate travel time between job sites. You can improve the accuracy of these estimates by enabling street-level routing (SLR), which considers real turn-by-turn data. To further fine-tune travel time calculation, enable predictive travel. For even more accurate travel time calculations using the exact service appointment location and incorporating time of day, enable point-to-point predictive routing.

*Enable Multiday Service Appointments*

Chances are that your grander projects require more than a day’s work. Happily, you can schedule service appointments that span multiple days.

*Set Up Optimization*

Configure optimization so that you can schedule appointments, address last-minute challenges, and minimize surprises for your team. You can set up optimization to run regularly, or run it manually.
Customize the Service Appointment Life Cycle

A service appointment life cycle shows the sequence of stages that a service appointment passes through. The life cycle starts when the appointment is created and ends when it reaches its final status.

This is a Field Service managed package feature.

Service appointments come with the following statuses to represent stages in their life cycle.

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

Tip: Update the status names to fit your business by editing the Status picklist values in Setup. Changing the name doesn’t change a status’s automatic transition behavior.

Here’s how to customize your service appointment life cycle.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Click Service Appointment Life Cycle.
3. Click SA Status. Select a status value for each description.
4. Save your changes.
5. Click the Status Transitions tab.
6. Each row represents a flow or transition in the service appointment life cycle. Modify the existing flows, delete flows, or add new ones.

   Note: When a service appointment is unscheduled, its status changes to None.

   Note: Emergency service appointments don’t consider status transitions when their status is changed to any status in the Dispatched status category.

7. Optionally, click More Details to limit the user profiles that can make each status change. You can also select a custom Visualforce page to display when a user tries to make the status change. The status flow diagram at the bottom of the page shows your status flows, but doesn’t show profile-based restrictions.
8. Save your changes.
Customize Appointment Booking Settings

Users can schedule service appointments for a work order, work order line item, or other record by using the Book Appointment Chatter action. Customize this scheduling experience from the Field Service Admin app.

This is a Field Service managed package feature.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Select Global Actions > Appointment Booking.
3. Configure your settings.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| Default scheduling policy   | The scheduling policy used to generate a list of arrival windows or time slots when a user clicks Book Appointment or Candidates in the feed. By default, these actions use the Customer First scheduling policy. This policy aims first to use the customer’s preferred service resources, then to schedule the appointment as soon as possible, and finally to minimize the resource’s travel time. Tip:  
  - You can also change this setting on the Customize Appointment Booking page in Guided Setup.  
  - Optionally, create a custom Scheduling Policy lookup field for an object and map it to the object on the Derivations tab in Global Actions. This way, records of that object type use the policy you selected rather than the default policy. |
| Default operating hours     | The operating hours that determine the arrival window time slots that are offered to customers. Each appointment’s scheduled start falls within the arrival window requested by the customer.  
  By default, the Gold Appointments Calendar operating hours are used, which consist of two-hour time slots, Monday–Friday, from 9 AM to 5 PM. You can change the arrival window operating hours on the Customize Appointment Booking page in Guided Setup—which also lets you quickly define and preview your hours—or from the Operating Hours tab. |
### Field Name

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tip:</strong> If different appointment booking windows are needed for different level of service—for instance, standard customers get 4-hour booking windows while VIP customers get 2-hour windows—add entitlements to your work orders. In the Operating Hours field on the entitlement, select the appropriate appointment booking window operating hours.</td>
<td></td>
</tr>
<tr>
<td>Ideal grading threshold</td>
<td>An appointment’s grade represents its adherence to the scheduling policy’s service objectives. Enter a value 0–100. When potential appointments are shown in the Book Appointment action, appointments with a grade equal to or higher than the ideal grading threshold have an Ideal flag.</td>
</tr>
<tr>
<td>Recommended grading threshold</td>
<td>An appointment’s grade represents its adherence to the scheduling policy’s service objectives. Enter a value 0–100. When potential appointment times are shown in the Book Appointment action, appointments with a grade below the ideal grading threshold and equal to or higher than the recommended grading threshold have a Recommended flag.</td>
</tr>
<tr>
<td>Minimum Grade</td>
<td>An appointment’s grade represents its adherence to the scheduling policy’s service objectives. Enter a value 0–100. Appointments below this value aren’t shown in the list.</td>
</tr>
<tr>
<td>Number of hours for initial appointment search</td>
<td>If the difference between the earliest start permitted and due date is greater than this value, the appointment is displayed in an initial list while the search continues for additional candidates.</td>
</tr>
<tr>
<td>Show grades explanation</td>
<td>When this option is selected, clicking the info icon next to an option shows its score for each service objective in the applied scheduling policy. These scores are averaged to form the overall score.</td>
</tr>
<tr>
<td>Custom CSS (cascading style sheet)</td>
<td>To customize the appearance of the Book Appointment and Candidates actions, enter a name of a CSS file.</td>
</tr>
<tr>
<td>Disable service territory picker in appointment booking</td>
<td>Hide the service territory field in the Book Appointment action.</td>
</tr>
<tr>
<td>Pin three highest graded time slots to the top</td>
<td>Highlight the three highest-graded time slots and pin them to the top of the list in a Golden Slots section.</td>
</tr>
<tr>
<td>Open extended view by default</td>
<td>Display appointment details in the extended view. When this option isn’t selected, users must click <strong>Show More Options</strong> to see the Earliest Start Permitted and Due Date fields.</td>
</tr>
<tr>
<td><strong>Note:</strong> For an appointment to be scheduled, the following information is required: scheduling policy, work type, earliest start permitted, and due date. While a service territory isn’t required, it’s recommended.</td>
<td></td>
</tr>
</tbody>
</table>
IN THIS SECTION:

**Time Zones and Appointment Booking**

In large field service operations, the service appointment’s support agent, assigned resource, and customer could all be in different time zones. Field Service’s appointment booking process shows each user’s appointment details in their own time zone.

**Time Zones and Appointment Booking**

In large field service operations, the service appointment’s support agent, assigned resource, and customer could all be in different time zones. Field Service’s appointment booking process shows each user’s appointment details in their own time zone.

This is a Field Service managed package feature.

If your operation spans multiple time zones, follow these guidelines when creating records.

- For work orders, complete the Service Territory field. A service appointment inherits its parent record’s service territory when the parent is a work order or work order line item, but you can set a unique service territory on an appointment.
- For service territories, select operating hours that are associated with the territory’s time zone. For example, for a New York service territory, select operating hours with the New York time zone.
- Create operating hours in Guided Setup that represent the arrival windows offered in the Book Appointment action.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Select Go to Guided Setup > Customize Appointment Booking.
3. Update the operating hours, and save your changes.

You can also update the operating hours from Field Service Settings > Scheduling > Appointment Booking.

When the Book Appointment action is used, Field Service doesn’t consider the time zone defined on the arrival windows operating hours record. Instead, it uses the time zone of the service appointment’s service territory’s operating hours. This way, when a customer selects a time slot, the appointment is scheduled according to the customer’s time zone.

**Example:**

- The support agent’s time zone is Eastern Time (ET).
- The service resource’s time zone is Mountain Time (MT) on both the user record and the primary service territory.

A customer in Nevada calls the company for an appointment, and the support agent creates a work order. The work order sets the customer’s service territory to the match the site address. The service territory uses the customer’s time zone—in this case, Pacific Time (PT).

On the Book Appointment page, the customer selects an arrival window of 1–3 PM. The arrival window is in the customer’s time zone (PT) because it uses the work order’s service territory’s time zone.

After the appointment is booked, each person involved can view its details in their time zone.

- When the customer (PT) receives an email confirmation, the arrival window is listed as 1–3 PM.
- When the support agent (ET) views the service appointment, the arrival window is listed as 4–6 PM.
- When the assigned resource (MT) checks the schedule in the Field Service mobile app, the arrival window is listed as 2–4 PM.
Reserve Time Slots for Designated Types of Work

Create specific time slots dedicated to service appointments that meet your criteria.

This is a Field Service managed package feature.

Any time slot on an operating hours record can be designated for a specific type of work. The type of work is determined by any checkbox field on service appointments. For example, you can designate a time slot to support only appointments whose Emergency field is selected.

1. Decide which service appointment fields can be used to reserve time slots.
   a. From the Object Manager, find the Service Appointment object and click Field Sets.
   b. Open the Designated Work Fields field set.
   c. Drag any checkbox field into the field set.
   
   Note: You can customize a field by adding it to the service appointment object.

2. Add the TimeSlot Designated Work work rule to one or more scheduling policies. When the policy is in use, the scheduling optimizer respects your designated time slot preferences during scheduling.
   a. Click the Scheduling Policies tab and select a policy.
   b. In the Scheduling Policy Work Rules related list, click New.
   c. In the Work Rule field, select New Work Rule.
   d. Select Field Service - TimeSlot Designated Work and click Next.
   e. Add a name and description.
   f. Save your changes.

3. Reserve a time slot for service appointments of a specified type.
   a. From the operating hours tab, select an operating hours record.
   b. From the detail view, right-click a time slot.
   c. Hover over Designate Work and select a checkbox.
If an appointment doesn’t meet the criteria of your designated time slot, the scheduling optimizer won’t schedule it within the time slot.

Set Up Routing for Travel Time Calculations

Field Service uses aerial routing to estimate travel time between job sites. You can improve the accuracy of these estimates by enabling street-level routing (SLR), which considers real turn-by-turn data. To further fine-tune travel time calculation, enable predictive travel. For even more accurate travel time calculations using the exact service appointment location and incorporating time of day, enable point-to-point predictive routing.

This is a Field Service managed package feature.

Point-to-point predictive routing is gradually replacing predictive travel (beta) and street-level routing and is available in all scheduling and optimization operations. As of Spring ’21, new Salesforce orgs get point-to-point predictive routing by default. Salesforce orgs before this retain predictive travel (beta) and their configuration but can switch to point-to-point predictive routing.

Per-appointment travel time is one of the most important KPIs that a field service organization tracks. A small improvement can give a mobile worker more time to work, drive less, reduce their carbon footprint, and promptly reach the customer. Accurate route planning helps your mobile workforce perform at the highest level.

Field Service uses routing to calculate and minimize travel time and distance between appointments, and shares this information with users. Travel time also factors into the scores assigned to available time slots and service resources during scheduling. Several routing options are available:

- **Aerial routing:** Computes the shortest distance between two locations based on a straight-line route.

- **Street-level routing:** Computes the distance along roads or transportation routes. SLR is based on actual road speed measurements and the expected travel speed based on road type. SLR calculation takes a bit longer than aerial routing calculation. You must be registered to use SLR. Registration is automatic. A **Register** button appears if necessary, for example, after you refresh a sandbox for Field Service.

- **Predictive travel (beta):** Builds on SLR by incorporating time-of-day data into the calculation. Predictive travel applies only to optimization operations; scheduling operations like the Book Appointment and Candidates actions don’t use it.
• **Point-to-point predictive routing**: Estimates travel time using the exact service appointment location and considers time of day. This routing is used across all scheduling and optimization operations.

Emergency work uses Real-Time Travel provided by Google.

To set your travel time calculation preferences, open the Field Service Admin app from the App Launcher. Select **Field Service Settings > Scheduling > Routing**.

**Considerations**

• Point-to-point predictive routing considers using toll roads when relevant. SLR and Predictive travel (beta) avoid toll roads, which can result in longer travel times.

• Service resources must have their home base location geocoded so that the scheduling engine knows the resource’s start and end points.

• When you switch from aerial routing to SLR, scheduling recalculates travel times, including times for already scheduled appointments.

• When SLR is activated, resource travel speed isn’t considered. However, if the calculation returns to aerial routing, travel speed is considered.

• The Street Level Routing Cache custom object improves SLR calculation time for distances that were calculated in the previous 30 days between two given points. Don’t delete this object.

• The travel time is based on the Driving profile in Google maps and can’t be changed.

• SLR creates a grid of 200-meter squares. Every service appointment within the grid gets the same geolocation for routing purposes.

• When a service appointment is dragged onto the Gantt to be scheduled, the routing calculation depends on the chosen start time. The time of day can affect typical road speed measurements, for example.

• If you’re scheduling work using Queueable Apex, use the Database.AllowsCallouts annotation to estimate travel time with SLR. If you don’t include this annotation, aerial routing is used instead. For more information, see [Queueable Apex: More Than an @future](#).

• The Travel From field on service appointments displays Aerial as the calculation method for all appointments, except for the last appointment of the day. Because Travel From is calculated only for the last service appointment of the day, its value is zero for every other appointment. The last appointment of the day is calculated with SLR.

• If a service appointment requires a travel distance of more than 100 kilometers, aerial routing is used.

• Multiday work scheduling doesn’t support SLR and uses aerial routing instead. Predictive travel isn’t supported with complex work.

• Any scheduling action that is triggered in a transaction with data manipulation language (DML) uses aerial routing. When SLR is enabled and scheduling requires SLR travel results that are not primed locally, you must use a callout to retrieve the results. If DML occurs in the same transaction as the callout, it causes an exception, for example, an Uncommitted Work Pending error. To avoid an exception, allow the system to use aerial routing or ensure that DML is completed in a separate transaction. If you want transactions of this type to cause an exception rather than a switch to aerial routing, from the App Launcher, find and open the **Field Service Admin** app, and then click **Field Service Settings > Scheduling**. Select **Avoid aerial calculation upon callout DML exception**.

• Optimization can use aerial, SLR, or predictive travel, and can report which routing method was used.

**Additional Considerations for Point-to-Point Predictive Routing**

• In Salesforce orgs before Spring ‘21, if you haven’t turned on point-to-point predictive routing, you can still switch to SLR or predictive travel (beta).

• Unlike SLR, which creates a grid of 200-meter squares, point-to-point predictive routing uses the exact locations of objects for scheduling.

• In multiday work scheduling, the exact departure time for each day is unknown, so the average travel time is used. Complex work uses point-to-point predictive routing in optimization, and average travel time for platform scheduling.
For a location (source or destination) that is more than 1.5 kilometers from the nearest road, aerial routing is used instead of point-to-point predictive routing.

Check which territories are fully covered by point-to-point predictive routing in the list of navigable countries.

**Important:** When you switch to point-to-point predictive routing, scheduling and optimization recalculate travel times, including times for already scheduled appointments. You may incur an overlap of appointments because of the more accurate, slightly longer, travel times. Use resource schedule optimization to fix overlaps locally (for specific resources), or run global or in-day optimization to reoptimize the whole schedule (this takes longer). Apply the Fix Overlaps scheduling policy.

---

**Enable Multiday Service Appointments**

Chances are that your grander projects require more than a day’s work. Happily, you can schedule service appointments that span multiple days.

1. **This is a Field Service managed package feature.**
   - From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
   - Click Scheduling > General Logic.
   - In the Multi-day service appointment field field, select Is MultiDay.
   - In Setup, add the Is MultiDay field to your service appointment page layout and save your changes.
   - From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets under Users.
   - Click Field Service Dispatcher Permissions.
   - In the Apps section, click Custom Permissions.
   - Click Edit.
   - Add the Longterm View custom permission to the Field Service Dispatcher permission set. This permission lets dispatchers select the Long-Term view in the Gantt, which displays up to 6 months at a time. The Long-Term view displays up to 1000 service appointments. The Long-Term view comes with filtering options, including the option to show only multiday appointments. Customize your Long-Term view settings from the Gantt filter’s Hours tab.
   - **Note:** The Long-Term view replaces the Multiday view, which displays 5 weeks at a time but doesn’t include filtering options.

2. Click Save.

3. To indicate that a service appointment must span multiple days, select Is Multiday on the appointment.

The length of the multiday appointment is based on its duration and the assigned resource’s availability.

**Example:** Let’s say you want to find the best resource to complete a multiday service appointment in San Francisco. Your service resources in San Francisco have operating hours from 9:00 AM to 6:00 PM, and their Resource Availability Work Rule gives them 30 minutes of travel time to and from appointments.

You need to schedule a multiday service appointment that lasts 10 hours. Given your service resources’ travel and time constraints, the Dispatcher Console finds the best service resource for the job. In this example, Alan Reed is the service resource who’s most available for this service appointment.
The Dispatcher Console automatically takes your service resources’ travel and break times into account to optimize your multiday appointments.

Set Up Optimization

Configure optimization so that you can schedule appointments, address last-minute challenges, and minimize surprises for your team. You can set up optimization to run regularly, or run it manually.

This is a Field Service managed package feature.

Note: Setting up optimization consumes one Salesforce license, so check that a license is available.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Click Optimization > Activation. Click Create Optimization Profile to create an optimization profile and an optimization user that submits optimization requests.
3. When you’re prompted, switch to the newly created optimization user.
   a. From Setup, navigate to the Users page and locate the optimization user.
   b. Click Edit next to the user and select Active on their profile.
      If you deactivate the optimization user, you can’t use optimization.
   c. Select Generate new password and notify user immediately.
   d. Log out.
4. When you receive the password reset email, click the link and complete the steps to log in as the optimization user.
5. When you’re logged in, click the + icon in the tab bar to see your full list of tabs. Click the Field Service Settings tab.
6. Click **Activate Optimization**.

7. Click **Allow** to allow remote site access and be redirected back to Field Service Settings.

8. Log out as the optimization user and log back in with your regular username and password.

   Optimization is now ready to use in your org.

Optimization includes these scheduling features.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
<th>Learn More</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-day optimization</td>
<td>Last-minute changes can derail your team’s schedule. Create scheduling policies that swiftly optimize the day’s schedule so that you can get your team back on track.</td>
<td>Optimize Today’s Schedule</td>
</tr>
<tr>
<td>Scheduling recipes</td>
<td>Tackle common scheduling challenges with optimization “recipes” that adjust your schedule after appointment cancellations, time changes, and overlaps. Cover all scenarios by creating multiple recipes in each category</td>
<td>Create Scheduling Recipes for Common Events</td>
</tr>
<tr>
<td>Predictive travel (beta)</td>
<td>Predictive travel builds on the street-level routing service by incorporating time-of-day route data into travel time estimates. Predictive travel applies only to optimization operations. This routing option is unavailable from Spring ’21. Point-to-point predictive routing replaces predictive travel.</td>
<td>Set Up Routing for Travel Time Calculations</td>
</tr>
<tr>
<td>Point-to-point predictive routing</td>
<td>Point-to-point predictive routing estimates travel time using the exact service appointment location and considers time of day. This routing is used across all scheduling and optimization operations.</td>
<td>Set Up Routing for Travel Time Calculations</td>
</tr>
<tr>
<td>Shift availability</td>
<td>Shifts let you assign workers for time periods that don’t follow a recurring pattern.</td>
<td>Manage Shifts</td>
</tr>
</tbody>
</table>

**Note:** If the Fix Overlaps feature is in use, the “Reshuffle other assignments” option is only partially supported for the setting: **When unable to find a valid schedule for an appointment**. If more than one appointment is dropped from the schedule during a Fix Overlaps operation, only one of the appointments is reshuffled.
Set Up Field Service in Experience Cloud Sites

Keep customers, partners, and contractors in the loop about field service work by adding field service objects to your Experience Cloud site.

If you use an Experience Cloud site to connect with your business partners, employees, or customers, keeping the communication lines open is key to field service success. For example, add work orders and service appointments to a partner site to stay in sync with contractors. Or, add return orders and return order line items to a site to coordinate customer returns. Field service objects are supported in Experience Builder sites and in Salesforce Tabs + Visualforce sites.

1. To set up field service objects in an Experience Builder site:
   a. Create an object page in the Pages menu in Experience Builder.
   b. When prompted to choose a Salesforce object, choose a field service object. Three related pages are automatically created for the new object page: a record detail page, a record list page, and a related list page. To use a Visualforce Lightning component in an Experience Builder site, add the Visualforce page from the managed package to the record detail page.
   c. To expose the field in your customer-facing site add it to the Navigation Menu.

2. To set up field service objects in a Salesforce Tabs + Visualforce site, add the objects as tabs. For help adding tabs and giving users access to them, see Add Tabs to Your Experience Cloud Site.

3. Optionally, configure guest user access to work orders. By default, guest users in sites can’t view or create work orders.
   a. From Setup, enter Digital Experiences in the Quick Find box, then select All Sites.
   b. Select Builder next to the site whose guest users need access to work orders.
   c. In the left-hand panel, click Settings, and then click the name of the guest user profile.
   d. In the Standard Object Permissions section, configure access to work orders and save your changes.

Note: Linked articles, which are knowledge articles attached to supported field service records, aren’t supported in Experience Builder sites.

IN THIS SECTION:
Add the Dispatcher Console to an Experience Builder Site
Hand over the dispatching reins to a field service contractor manager by embedding the dispatcher console in an Experience Builder site.
Add the Dispatcher Console to an Experience Builder Site

Hand over the dispatching reins to a field service contractor manager by embedding the dispatcher console in an Experience Builder site.

Notably, this is a Field Service managed package feature.

1. Add the dispatcher console to your Experience Builder site.
   a. In Experience Builder, open the Pages menu on the top toolbar.
   b. Click New Page at the bottom of the Pages menu.
   c. Click Standard Page, and follow the prompts to create your page. Give it a helpful name, like Dispatcher Console.
   d. Assign the page a one-column layout.
   e. From the Components menu, drag a Visualforce Page component to the Content section of the page. Set the component’s properties as follows:
      - VF Page name: vf001_ServiceExpert
      - Height: Any value (we suggest 800 pixels)
      - Record ID: Leave unchanged — {!recordId}
   f. Open the navigation menu and add a menu item. Use the following settings:
      - Name: Any value (for example, Dispatcher Console)
      - Type: Community Page
      - Page: Select the page you created earlier
   g. In the Members section, select the Field Service Community Dispatcher Permissions to be allowed in the site.
   h. Publish your changes.

2. Give site users access to the new dispatcher console page.
   a. Confirm that the site users who need access to the dispatcher console have a Partner Community user license.
   b. Confirm that a service territory has been created for the contractor. For details, see Guidelines for Setting Up Field Service Contractors.
   c. Create the site dispatcher permission sets. From the App Launcher, find and open the Field Service Admin app, and then click Field Service Settings. Then, click Getting Started > Permission Sets.
   d. Find the Field Service Community Dispatcher tile. Confirm that the tile shows a message indicating that the permission set is current. If it doesn’t, click Create Permissions.
   e. Assign two permission sets to the site users who need access to the dispatcher console:
      - Field Service Community Dispatcher License permission set
      - Field Service Community Dispatcher Permissions permission set

Note: Site dispatchers can’t access the complex work feature—for details, see Create Scheduling Dependencies Between Service Appointments—or Live Gantt updates.
Test Your Field Service Configuration with Health Check

Use the Field Service Health Check to run a suite of automated tests on your Field Service settings and configuration data. When Health Check identifies a problem, you get on-the-spot recommendations to align your Field Service configuration with our best practices.

⚠️ This is a Field Service managed package feature.

To get the most useful results from this Health Check, complete setting up Field Service.

You can run two types of validations with the Field Service Health Check: general and horizon based.

- A general validation checks your org for incorrect configurations, such as out-of-date permission sets or incomplete scheduling policies.
- A horizon-based validation checks the service appointments, resources, and territory memberships for a given time frame and service territory. It makes sure that these records don’t have any issues that could result in scheduling errors.

For both types of validations, results are grouped as critical tests and important tests. A critical test failure can result in immediate performance degradations. An important test failure can impact performance, or it can be caused by a deliberate customization that goes against our typical best practices.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Click Health Check.
3. Run Health Check on your Field Service configuration.
a. Under General Validations, view the results of the last Field Service Health Check run. The tests are rerun each time you open the page. If you make any changes, click Re-Run All Tests.

b. Under Horizon Based Validations, enter information for the scheduling horizon that you would like to check, and click Run Tests. Horizon Based Validations can take a little while to complete.
   • For Horizon Start and Horizon End, select the date range to validate.
   • For Service Territories, select at least one territory. You can also choose whether to validate service appointments that aren’t assigned to a territory.
   • Select a scheduling policy to validate your configuration against.
   • Optionally, select a filter. For example, validate only pinned appointments. You can filter validations using only boolean fields.

---

4. View your results. To get more information on failed tests, select More Info in the Actions dropdown menu.
Report on Field Service

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

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

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

   Note: This table doesn’t include feed objects that are available as secondary objects.

<table>
<thead>
<tr>
<th>Primary Object</th>
<th>Description</th>
<th>Available Secondary Objects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>View accounts’ maintenance plans, product requests, return orders, resource preferences, and work orders.</td>
<td>Field service objects: Maintenance Plans, Product Requests, Product Request Line Items, Resource Preferences, Return Orders, Work Orders</td>
</tr>
<tr>
<td>Assets</td>
<td>View assets’ maintenance plans, replacements, and work orders.</td>
<td>Field service objects: Asset Relationships, Maintenance Assets, Work Orders</td>
</tr>
<tr>
<td>Cases</td>
<td>View cases’ work orders, return orders, and product requests.</td>
<td>Field service objects: Product Requests, Product Request Line Items, Return Orders, Work Orders</td>
</tr>
<tr>
<td>Contacts</td>
<td>View contacts’ maintenance plans, service appointments, return orders, and work orders.</td>
<td>Field service objects: Maintenance Plans, Return Orders, Service Appointments, Work Orders</td>
</tr>
<tr>
<td>Locations</td>
<td>View locations’ maintenance plans, parts, part transfers, and more.</td>
<td>Addresses, Assets, Maintenance Plans</td>
</tr>
<tr>
<td>Primary Object</td>
<td>Description</td>
<td>Available Secondary Objects</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Maintenance Plans</td>
<td>View maintenance plans’ work orders and assets.</td>
<td>Maintenance Assets</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Work Orders</td>
</tr>
<tr>
<td>Operating Hours</td>
<td>View the operating hours of service territories and their members.</td>
<td>Service Territories</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Time Slots</td>
</tr>
<tr>
<td>Orders</td>
<td>View an order’s associated return orders.</td>
<td>Field service objects:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Return Orders</td>
</tr>
<tr>
<td>Product Items</td>
<td>View the transfer, consumption, and replenishment of parts in your inventory.</td>
<td>Product Transfers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Products Consumed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Product Item Transactions</td>
</tr>
<tr>
<td>Product Request Line Items</td>
<td>View the transfers related to parts in your inventory.</td>
<td>Product Transfers</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product Requests</td>
<td>View the line items and return orders associated with product requests.</td>
<td>Product Request Line Items</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Return Orders</td>
</tr>
<tr>
<td>Products</td>
<td>View product requirements, transfers, requests, return order line items, and parts.</td>
<td>Field service objects:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Assets</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Product Items</td>
</tr>
<tr>
<td><strong>Primary Object</strong></td>
<td><strong>Description</strong></td>
<td><strong>Available Secondary Objects</strong></td>
</tr>
<tr>
<td>--------------------</td>
<td>----------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Products Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product Request Line Items</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product Transfers</td>
<td>View product quantity, origin and destination locations, and owner of product transfers.</td>
<td>None</td>
</tr>
<tr>
<td>Return Order Line Items</td>
<td></td>
<td>Return Order Line Items</td>
</tr>
<tr>
<td>Service Appointments</td>
<td>Compare the differences between scheduled and actual appointment times, and analyze trends in resource assignment on appointments.</td>
<td>Assigned Resources</td>
</tr>
<tr>
<td>Service Contracts</td>
<td>View service contracts' maintenance plans and work orders.</td>
<td>Field service objects: Maintenance Plans, Work Orders</td>
</tr>
<tr>
<td>Service Crews</td>
<td>View appointments that crews are assigned to and information about crew members.</td>
<td>Assigned Resources, Service Crew Members</td>
</tr>
<tr>
<td>Service Resources</td>
<td>Compare service resources' capacities, absences, and skills, and view the territories they belong to and service appointments and crews they are assigned to. And, see which accounts or work orders list resources as preferred.</td>
<td>Assigned Resources, Resource Absences, Resource Capacities, Resource Preferences, Service Crew Members, Service Resource Skills, Service Territory Members, Time Sheets</td>
</tr>
<tr>
<td>Service Territories</td>
<td>Compare the number and types of service appointments, work orders, and work order line items across service territories, and view the service resources that belong to each territory.</td>
<td>Service Appointments, Service Territory Members, Service Territory Locations, Work Orders, Work Order Line Items</td>
</tr>
<tr>
<td>Shipments</td>
<td>View shipment address and transfer information.</td>
<td>Product Transfers</td>
</tr>
<tr>
<td>Time Sheets</td>
<td>View time sheets' owners, entries, and duration.</td>
<td>Time Sheet Entries</td>
</tr>
<tr>
<td>Primary Object</td>
<td>Description</td>
<td>Available Secondary Objects</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------</td>
<td>----------------------------</td>
</tr>
</tbody>
</table>
| Users          | View field service records created by, modified by, or associated with users. | Field service objects:  
- Assets (Asset Owner, Created By, Last Modified By)  
- Locations (Created By, Last Modified By)  
- Maintenance Plans (Created By, Last Modified By)  
- Operating Hours (Created By, Last Modified By)  
- Product Items (Created By, Last Modified By)  
- Product Requests (Created By, Last Modified By)  
- Product Request Line Items (Created By, Last Modified By)  
- Product Transfers (Created By, Last Modified By)  
- Return Orders (Created By, Last Modified By, Returned By)  
- Service Appointments (Created By, Last Modified By)  
- Service Crews (Created By, Last Modified By)  
- Service Resources (User, Created By, Last Modified By)  
- Service Territories (Created By, Last Modified By)  
- Shipments (Created By, Last Modified By)  
- Time Sheets (Created By, Last Modified By)  
- Work Orders (Owner, Created By, Last Modified By)  
- Work Types (Created By, Last Modified By) |
| Work Orders    | Compare information such as the number of appointments or line items per work order, or work order service territories. And, analyze how resource preferences and skill requirements vary between work orders. | Object Milestones  
- Products Consumed  
- Product Requests  
- Products Required  
- Product Request Line Items  
- Resource Preferences  
- Service Appointments |
3. Complete the required fields and click **Next**.

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

4. Click **Save**.

5. As needed, remove and rearrange fields from your report layout.

Salesforce also offers the Field Service Analytics App, which is bundled with the Service Analytics App. To learn more, see [The Field Service Analytics App](#).

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

### Manage Data Integration Rules for Field Service

Set up data integration rules to ensure that service resource travel time is accurately calculated. When you add a street address to certain types of field service records, Salesforce calculates the address’s latitude, longitude, and location accuracy. You can reference this data, which is visible only in the API, in any custom field service applications. Geolocation information is used to calculate service resource travel times if the Field Service managed package is installed.

This geolocation data feature, known as “geocoding”, is enabled for all supported field service objects when you enable Field Service. The API contains values for the three fields in the following table on:

- Work orders
- Work order line items
- Service appointments
- Service territories
- Resource absences
- Service territory members

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in **Enterprise, Unlimited, and Developer** Editions.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Latitude</td>
<td>The latitude of the street address.</td>
</tr>
<tr>
<td>Longitude</td>
<td>The longitude of the street address.</td>
</tr>
</tbody>
</table>
| GeocodeAccuracy | The accuracy of the latitude and longitude. This field contains one of the following values, listed in order from most to least accurate:  
  - Address: In the same building  
  - NearAddress: Near the address  
  - Block: Midway point of the block  
  - Street: Midway point of the street  
  - ExtendedZip: Center of the extended ZIP code area  
  - Zip: Center of the ZIP code area  
  - Neighborhood: Center of the neighborhood  
  - City: Center of the city  
  - County: Center of the county  
  - State: Center of the state  
  - Unknown: No match for the address was found (for instance, the address is invalid) |

**Note:** Because Google Maps is restricted in China, Field Service features that depend on Google Maps don't work there. To minimize errors and customize access for users in China, see [Disable Google Maps-based Field Service features for China users](#).

### Keep Geocoding Data Current
Salesforce uses data integration rules to periodically refresh these three fields. A refresh occurs when:

- The record is created or updated
- The record type’s data integration rule is deactivated and reactivated

Allow some time for the geocoding fields to refresh. The processing time varies based on the number of records being updated.

**Note:** If bulk geocoding is turned off for a data integration rule, deactivating or reactivating the rule doesn’t refresh the geocoding fields. Bulk geocoding is enabled by default.

To keep an eye on the status of a record’s geocoding data:

- **In Lightning Experience:** On the record, select **Check for New Data** in the action menu.
- **In Salesforce Classic:** Add the Data Integration Rules related list to the detail page layout of the records you’d like to track. The related list includes:
  - The time the record’s geocoding data was last refreshed.
  - The record’s geocoding status. To learn what each status means, see **_statuses for Data Integration**. A status of In Sync means that your geocoding data is current.
  - An **Update** link that lets you manually run an instant refresh.
Opt out of Geocoding

If you’re already using another geocoding service, opt out of Field Service geocoding.

1. From Setup, enter *Data Integration* in the Quick Find box, then select *Data Integration Rules*.
2. Click **Deactivate** next to the following rules.
   - Geocodes for Work Order Address
   - Geocodes for Work Order Line Item Address
   - Geocodes for Service Appointment Address
   - Geocodes for Service Territory Address
   - Geocodes for Service Territory Member Address
   - Geocodes for Resource Absence Address

Manage Work Orders for Field Service

Work orders, which track work to be performed for customers, are the heart of Field Service. Learn how to create and customize work orders and maintenance plans.

**IN THIS SECTION:**

- **Create Work Orders for Field Service**
  - Create work orders to track work that your team does for customers.

- **Create Maintenance Plans**
  - Create preventive maintenance plans for assets so your customers never miss a beat. With maintenance plans you define how often maintenance visits occur and generate work orders for future visits.

**EDITIONS**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.
Create Work Orders for Field Service

Create work orders to track work that your team does for customers.

1. From the Work Orders tab or the Work Orders related list on a record, click **New**.
2. Optionally, select a work type. Work types are templates that auto-populate these settings on work orders:
   - Duration
   - Duration Type
   - Minimum Crew Size
   - Recommended Crew Size
   - Service Report Template
   - Skill Requirements
   - Products Required
   - Auto-creation of a service appointment
   - Attached knowledge articles
3. Enter the address for the work order. The work order’s service appointments and line items inherit its address, though the address on line items can be updated.
4. Optionally, link each work order line item to a price book entry (product), select a price book.
5. To track pricing on work orders, enter the tax amount. For example, in a work order whose total price is $200, enter \(0.20\) to apply a 10 percent tax. You can enter a number with or without the currency symbol and use up to two decimal places.
6. Complete the remaining fields as needed.
7. Save your work.
8. Optionally, add details in the work order’s related lists.
   - **Work Order Line Items**: Subtasks or steps that must be performed to complete the work order. Line items can be marked as completed one by one, and can each have their own active service appointment, work type, and required skills and products. Pricing details like discounts and unit price are set at the line item level.
   - **Child Work Orders**: Child records of the work order, which are useful in complex jobs.
   - **Service Appointments**: Records of visits to the customer. Work orders and work order line items can have multiple service appointments. To create a service appointment at the same time as the work order, select **Auto-Complete Service Appointment** on the associated work type.
   - **Products Required**: Inventory required to complete the work order. For details, see **Track Required Inventory**.
   - **Skill Requirements**: Skills required to complete the work order. For help, see **Add Required Skills to Work Orders or Work Types for Field Service**.
   - **Articles**: Relevant knowledge articles.
   - **Resource preferences**: Service resource for the work order that’s preferred, required, or excluded. Resource preference is set based on the resource preference on the work order’s asset, location, or account, in that order. Salesforce sets the preference using the first resource preference it finds on asset, then location, then account. If a resource preference exists, Salesforce doesn’t create a new one.
IN THIS SECTION:

Add Service Resource Preferences in Field Service
Designate certain service resources as preferred, required, or excluded on accounts, assets, locations, work orders, and work order line items. Ensure great customer service by matching the best worker to the job.

Add Required Skills to Work Orders or Work Types for Field Service
Ensure that every field service appointment is assigned to a service resource with the right skills. Add skill requirements to work types, work orders, and work order line items so they can be checked against a service resource’s assigned skills.

Attach Knowledge Articles to Work Orders or Work Types
Learn how to interact with knowledge articles on work orders, work order line items, and work types.

Guidelines for Creating Work Orders for Field Service
Work orders help you track tasks to be performed on a product. Learn how to create and manage work orders.

Work Order Pricing Guidelines for Field Service
Work orders and work order line items have several price-related settings. Learn about these settings and how to apply them to your business.
Add Service Resource Preferences in Field Service

Designate certain service resources as preferred, required, or excluded on accounts, assets, locations, work orders, and work order line items. Ensure great customer service by matching the best worker to the job.

Work orders (and work order line items) inherit the resource preference from one of the work order’s related records: asset, location, or account. The system looks for a resource preference first on asset, then location, then account, and copies the first preference it finds. For example, if the location and account have a resource preference, but the asset doesn’t, then a resource preference is created from the location’s resource preference. If you don’t want to establish resource preferences at the account level, add them to individual work orders or work order line items.

To enforce resource preferences during schedule optimization, use the Required Resources and Excluded Resources work rules, which are included in the Customer First scheduling policy. The Resource Priority service objective also measures an appointment’s adherence to resource preferences of the Preferred type. If you’re not using the Field Service managed package, resource preferences serve as a suggestion rather than a requirement.

1. On a work order or account, click New in the Resource Preferences related list.
2. Select a service resource. You can’t add preferences for service resources who are inactive or dispatchers.
3. Select a preference type: Preferred, Excluded, or Required.
4. Save your changes.

Example:

- If your customer had a positive experience with Alicia, a service resource, create a resource preference on the customer’s account that designates Alicia as Preferred.
- If your customer had a bad experience with Nigel, a service resource, create a resource preference on the customer’s account that designates Nigel as Excluded.
- If your customer purchased a complex piece of equipment that was installed by Evan, a service resource, create a resource preference on the customer’s account that designates Evan as Required.

The customer’s work orders automatically list those three preferences. This helps the dispatcher know to assign their service appointments to Evan and, if a second worker is needed, to Alicia if she is available. The dispatcher also knows never to assign the account’s service appointments to Nigel.
Add Required Skills to Work Orders or Work Types for Field Service

Ensure that every field service appointment is assigned to a service resource with the right skills. Add skill requirements to work types, work orders, and work order line items so they can be checked against a service resource’s assigned skills.

Adding required skills to work types saves you time and keeps your business processes consistent. Work orders and work order line items inherit their work type’s required skills. For example, a refrigeration company can add a skill requirement of Refrigerator Maintenance—skill level 50—to their Annual Maintenance work type. When an agent creates a work order for their customer’s annual fridge maintenance, selecting that work type on the work order adds the required skill.

If the Field Service managed package is installed, you can use Guided Setup to add required skills to work types. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab. Then, click Go to Guided Setup, select Create Work Types and Skills, and enter skills in the Skill Requirements field of any work type.

You can also add required skills to work orders, work order line items, or work types from the Skill Requirements related list, outside of Guided Setup.

1. Navigate to the record that needs required skills.
2. In the Skill Requirements related list, click New.
3. Select a skill. When you’re not using Guided Setup, skills must be created before they can be added as a requirement; to learn how, see Guidelines for Creating Skills for Field Service.
4. Enter a skill level from 0 to 99.99 based on how your business measures skill level.
5. Click Save. The skill now appears in the Skill Requirements related list on the record.

You can enforce skill requirements during schedule optimization using the Match Skills work rule. This rule ensures that appointments are assigned only to service resources who possess the required skills listed on the parent record. If you’re not using the Field Service managed package, skill requirements serve as a suggestion rather than a rule.

Attach Knowledge Articles to Work Orders or Work Types

Learn how to interact with knowledge articles on work orders, work order line items, and work types.

Attach an Article

Search for and attach articles to a record from the Articles related list, the Knowledge One console widget, or the Knowledge component in Lightning Experience.

- In Salesforce Classic: In the Articles related list on a record, click Find Article to search for an article, and then attach it.
- In the Salesforce Classic console: To attach articles to work types, use the Articles related list on the work type. To attach articles to work orders or work order line items, use the Knowledge One widget or the Articles related list.
- In Lightning Experience and the Lightning Experience console: In the Knowledge component on a record, search for the article and then attach it.
View an Attached Article
Attached articles appear in the Articles related list, Knowledge Lightning component, and Knowledge One console widget. View an article by clicking its title. If feed tracking for related lists is enabled, you can navigate to attached articles from the record feed.

On article detail pages in Salesforce Classic, the Linked Work Orders and Linked Work Order Line Items related lists show the records that an article is attached to. A Linked Work Types related list isn’t available.

Update an Attached Article
To publish a new version of an article, open the article and click Edit.

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

Note: Only one version of an article can be attached to a record.

Detach an Article
Detach articles from the Articles related list or Knowledge One console widget in Salesforce Classic, and from the Knowledge component in Lightning Experience.

Note: Linked articles have the following limitations.

• Quick actions and global actions aren’t supported for linked articles.
• The Article widget and Feed Articles Tool aren’t available in the feed view.
• In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic. In the Salesforce mobile app, linked articles can’t be accessed from feed items.
• The Linked Work Types related list isn’t available on articles in any platform.
• The Knowledge One widget isn’t available on work types in the console. To manage linked articles on work types in the console, use the Articles related list.
• Linked articles are read-only in the Salesforce mobile app.

Guidelines for Creating Work Orders for Field Service
Work orders help you track tasks to be performed on a product. Learn how to create and manage work orders.

View Work Orders
View work orders from the Work Orders tab or the Work Orders related list on the following types of records:

• Accounts
• Assets
• Cases
• Contacts
• Entitlements
• Maintenance plans

EDITIONS
Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

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Create Work Orders

Create and edit work orders from the Work Orders tab or the Work Orders related list. When you create a work order, add line items to the work order from the Work Order Line Items related list. Work order line items are tasks that a mobile worker must perform to complete a work order. They can be marked as completed one by one, and they make it easier to track and improve field service processes. Pricing details like discounts and unit price are set at the line item level on work orders.

Delete Work Orders

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

Create Work Order Hierarchies

Work orders can have child work orders, which are standalone records that can be scheduled, given statuses, and assigned. Child work orders help you account for cancellations. When work is canceled, you can set the work order status to Canceled and create a child work order. This lets you track first-time rates and analyze cancellation reasons.

Share Work Orders

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

To see who has access to a work order, click Sharing on the work order’s detail page. Work order line items inherit their parent work order’s sharing settings. To learn more, see Limit Access to Field Service Records.

How Work Orders and Service Appointments Intersect

Service appointments on work orders and work order line items represent service visits to the customer. While work orders and work order line items let you enter general information about a task, service appointments track details about when, where, and how a visit occurs. Schedule optimization is based on service appointment data.

Work orders and work order line items provide important capabilities, including price book association and Salesforce Knowledge integration. The Field Service mobile app experience is also optimized for service appointments whose parent record is a work order or work order line item.

Service Resource Preferences

The resource preference related list stores a preferred, required, or excluded resource. When a work order or work order line item is created, the resource preference is copied from the record’s asset, location, or account. Salesforce sets the preference using the first resource preference it finds on asset, then location, then account. If a resource preference exists, Salesforce doesn’t create a new one.
Work Order Pricing Guidelines for Field Service

Work orders and work order line items have several price-related settings. Learn about these settings and how to apply them to your business.

If you’ve set up a product catalog in Salesforce to track the goods and services that you offer, 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 a work order lists a price book, you can link each work order line item to a price book entry (product) from the price book.

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

Work orders contain these price-related fields.

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

Work order line items contain these price-related fields.

<table>
<thead>
<tr>
<th>Work Order Line Item Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount</td>
<td>The percent discount to be applied to the line item’s subtotal. You can enter a number with or without the percent symbol and you can use up to two decimal places.</td>
</tr>
<tr>
<td>Subtotal</td>
<td>(Read only) The line item’s unit price multiplied by the quantity.</td>
</tr>
<tr>
<td>Total Price</td>
<td>(Read only) The line item’s subtotal with discounts applied. This field is blank until you add a unit price and save the line item.</td>
</tr>
<tr>
<td>List Price</td>
<td>(Read only) The price of the line item (product) as listed in its corresponding price book entry. If a product isn’t selected, the list price defaults to zero.</td>
</tr>
</tbody>
</table>

Note: When you select a product to link to the line item, you can see the product’s list price next to its name and ID in the lookup window. The list price field populates when you save the line item.
<table>
<thead>
<tr>
<th>Work Order Line Item Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Product                   | The name of the product associated with the line item. The lookup only lists products that are included in the parent work order’s price book. When you select a product and save the line item, the following fields are populated on the line item:  
  • List Price  
  • Unit Price  
  • Subtotal  
  • Total Price  
  Note: Inline editing isn’t supported on the Product field. To change the product on a line item, click Edit. Adding a product updates the list price, unit price, subtotal, and total price based on the related entry in the work order’s price book. |
| Unit Price                 | By default, the unit price for a work order line item is the line item’s list price from the price book, but you can change it. |

**Completing Price Fields**

- When completing work order price fields, complete only the Price Book and Tax fields. The Discount, Subtotal, Total Price, and Grand Total fields are automatically calculated based on line item fields.
- When completing work order line item price fields, complete only the Product and Discount fields. The Subtotal, Total Price, List Price, and Unit Price fields are automatically calculated based on other line item fields.
- Apply discounts to work orders at the line item level. If your work order doesn’t have line items, its discount is zero.
- Work order line items don’t have to be linked to a product. For example, perhaps you use line items only to track tasks. Just keep in mind that if the Product field is blank, you can’t use the List Price, Unit Price, Discount, Quantity, Subtotal, or Total Price fields.
- If you plan to use price books for work orders, users need “Use” sharing access to the price book object to complete the following actions:
  - Create or edit work orders with the Price Book field completed
  - Create work order line items with the Product field completed
  - Create products consumed with the Price Book Entry field completed

**Deleting Products and Price Books**

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

**USER PERMISSIONS**

<table>
<thead>
<tr>
<th>To create maintenance plans:</th>
<th>Create on maintenance plans</th>
</tr>
</thead>
<tbody>
<tr>
<td>To view maintenance assets:</td>
<td>Read on maintenance plans and assets</td>
</tr>
<tr>
<td>To create, update, or delete maintenance assets:</td>
<td>Edit on maintenance plans</td>
</tr>
<tr>
<td>To generate work orders for a maintenance plan:</td>
<td>Read on assets and work types AND Create on work orders and service appointments</td>
</tr>
<tr>
<td>To edit page layouts:</td>
<td>Customize Application</td>
</tr>
</tbody>
</table>

**EDITIONS**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

Create preventive maintenance plans for assets so your customers never miss a beat. With maintenance plans you define how often maintenance visits occur and generate work orders for future visits.

**Note:** The fields displayed depend on your page layout settings.

1. From the Maintenance Plans tab or related list, click **New**.
2. Enter a start date, if applicable, enter an end date, for example, where you’ve a service contract that entitles the customer to two years of maintenance visits. All work orders related to the plan must fall within this date range.
3. Select a work type. Maintenance work rules for and maintenance assets covered by the plan inherit the same work type, though you can update them to use a different work type.
4. Select an account and contact that represent the customer.
5. If the maintenance plan tracks work that’s outlined in a service contract, select the service contract. You can associate assets covered by the maintenance plan with contract line items on the service contract.
6. If the maintenance visits are at a location that’s tracked in Salesforce, such as a customer site, select the location.
7. To use standard maintenance recurrence, in the Frequency and Frequency Type fields, enter the desired amount of time between the maintenance plan’s work orders.
   For example, if you’ve agreed to perform monthly maintenance visits, you need a work order for each visit, so enter 1 and select Months.
8. In the Generation Timeframe and Generation Timeframe Type fields, enter how far in advance you want work orders to be generated at one time.
   For example, to generate 3 months’ worth of work orders at a time, enter 3 and select Months.
9. Enter the date of the first work order in the next batch, which corresponds to the work order’s Suggested Maintenance Date.
   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 shows a Suggested Maintenance Date of May 1. The dates on the later work orders are based on the Generation Timeframe, Frequency, and End Date settings. Also, batch timing is calculated at the maintenance asset level or at the work rule level. So if the maintenance plan includes assets or work rules, after each batch is run, the Suggested Maintenance Date auto-updates on:
   - if assets have no work rules, the maintenance assets
   - if assets have work rules, on the work rules.
10. Optionally, enter the days for the maintenance window start and end. These settings impact the Earliest Start Permitted and Due Date fields on the maintenance plan’s work orders’ service appointments. If the maintenance window fields are left blank, the service appointment date fields list their work order’s suggested maintenance date.

For example, enter 3 for both the maintenance window start and end. The Earliest Start Permitted and the Due Date will be, respectively, 3 days before and 3 days after the Suggested Maintenance Date on each work order.

11. To automatically generate a batch of work orders when the current batch nears completion, select **Auto-generate work orders**. If this option isn’t selected, you must click **Generate Work Orders** on the maintenance plan to generate a new batch.

A separate work order is created for each maintenance asset for each maintenance date. Therefore, batch size reflects the generation timeframe, frequency, and the number of assets covered by the plan. For example, if the plan covers two assets and has a generation timeframe of 2 months and a frequency of 1 month, four work orders are generated at a time.

12. If you selected the option to auto-generate work orders, you can add details about when new batches are generated:
   - To run batch generation before the maintenance plan’s Date of the first work order in the next batch, enter a generation horizon. For example, a generation horizon of 5 means that a new batch of work orders is generated 5 days before the maintenance plan’s Date of the first work order in the next batch. If you don’t specify a generation horizon, it defaults to zero.
   - If you don’t want a new batch of work orders to be generated until the final work order in the current batch is completed, select **Generate new batch upon completion**. A work order is considered completed when its status falls into one of the following status categories: Cannot Complete, Canceled, Completed, or Closed.

13. If more than one asset is associated with this maintenance plan, select a Work Order Generation Method: one work order for each asset or one work order line item for each asset.

14. If work order generation method is **One work order line item per asset**, select a Service Appointment Generation Method: one service appointment for the parent work order or one service appointment for each work order line item.

To learn more about work order and service appointment generation, see [How Do Generation Methods Work?](#).

15. Enter a title and description for the maintenance plan.

16. Save your changes.

17. Add assets covered by the plan in the Assets related list. Maintenance assets inherit their plan’s work type and date of the first work order in the next batch.

   **Tip:** To control which fields appear in the related list, edit the Related List on the Maintenance Assets page layout in Setup.

18. To use advanced recurrence, add maintenance work rules in the Maintenance Work Rules related list to schedule maintenance for all of the plan’s assets, these rules act as the default for any assets without their own maintenance work rule. If not all assets are covered by the same maintenance schedule, add maintenance work rules to those assets to override the maintenance work rules on the maintenance plan.

19. If you didn’t select the option to auto-generate work orders, click **Generate Work Orders** on the maintenance plan to generate a batch of work orders. Otherwise, they’re automatically generated for you.

Generation can’t create a combined total of more than 2,600 work orders and work order line items at a time. To decrease the number of work orders and work order line items generated, make one of these changes:

- Increase the Frequency value
- Decrease the Generation Timeframe value
- Remove assets from the maintenance plan
Guidelines for Generating Work Orders from a Maintenance Plan

Maintenance plans offer a quick way to automate the creation of work orders for periodic maintenance visits. Learn how to generate work orders from a maintenance plan using the maintenance plan frequency fields.

Note: Refer to Guidelines for Working with Maintenance Work Rules for details on how work orders are generated from maintenance work rules.

How Many Work Orders Are Generated at a Time?

Maintenance plan work orders are generated in batches. The number of work orders in a batch is based on several maintenance plan settings:

- Generation timeframe: determines how far into the future work orders are generated
- Frequency: determines the amount of time between work order dates
- Number of maintenance assets: work order is created per asset, per suggested maintenance date

For example, with a generation timeframe of 1 year, a frequency of 2 months, and two maintenance assets, one batch contains 14 work orders that cover 1 year’s worth of maintenance visits. Work orders are also generated for the final day of the timeframe. If the generation timeframe is 1 year and the Date of the first work order in the next batch is January 1, 2020, work orders are also generated for January 1, 2021.

How Do I Generate Work Orders?

You can manually generate each batch of work orders or choose to have a new batch generated automatically. If frequent changes are needed after each visit, manual generation gives you more control. Automatic generation provides the assurance that you’re delivering the maintenance you promised to your customer.

To manually generate work orders from a maintenance plan:

- Confirm that Auto-generate work orders isn’t selected.
- Click Generate work orders. When the Work order generation status on the maintenance plan changes to Complete, the generated work orders appear in the Work Orders related list.

To turn on automatic generation, select Auto-generate work orders.

If Auto-Generation Is Turned On, When Is a New Batch Generated?

Where you’re using maintenance plans without maintenance work rules:

- If the maintenance plan includes assets, a new batch is generated for each maintenance asset on the maintenance asset’s Date of the first work order in the next batch.
- If the maintenance plan doesn’t include any assets, a new batch is generated on the maintenance plan’s Date of the first work order in the next batch.

To further customize batch generation timing, specify a Generation Horizon (Days) or select Generate new batch upon completion. For details, see Maintenance Plan Fields.
Note: If both Auto-generate work orders and Generate new batch upon completion are selected, Salesforce doesn’t generate a new batch of work orders for a maintenance asset until the final work order for that asset in the current batch is completed. If one maintenance asset’s final work order is completed but another’s is stalled, work orders are generated only for the first maintenance asset. This behavior results in a staggered batch generation schedule for the maintenance plan.

Can I Get a Report of the Work Orders Generated?

Enable Chatter and Feed-tracking to receive a Chatter post detailing the work orders, work order items, and service appointments generated for each maintenance plan.

How Do Generation Methods Work?

Generation methods can help simplify dispatch by combining work for the same day into a parent work order with a work order line item for the relevant asset covered by the maintenance plan. Also, you can choose to create a service appointment for the work order or suite work order line item.

On a maintenance plan, select your generation method preferences.

- Choose whether to create one work order or one work order line item for each maintenance asset. Where you have maintenance work rules on a maintenance asset, it means one work order or one work order line item for each maintenance work rule.
- If you select **One work order line item per asset**, choose whether to create a service appointment for each work order or each work order line item.

To ensure that all assets with the same suggested maintenance date are maintained under one work order, select **One work order line item per asset**. If each asset needs a separate service appointment, select **One service appointment per work order line item**.

When **One work order line item per asset** is set, a work order line item is generated for each relevant asset and maintenance work rule. All work order line items sharing the same Next Suggested Maintenance Date are grouped under a work order.

Tip: To provide guidance on which asset to service first, second, and so on, create guided actions, or flows, in the parent work order.

If **Work Order Generation Method** is left as **None**, the generation is defaulted to one work order per asset.

<table>
<thead>
<tr>
<th>Work Order Generation Method</th>
<th>Service Appointment Generation Method</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>One work order per asset</td>
<td>One work order line item per asset</td>
<td>✔️</td>
</tr>
<tr>
<td>One work order line item per asset</td>
<td>One service appointment per work order</td>
<td>✗</td>
</tr>
<tr>
<td>One service appointment per work order line item</td>
<td>✗</td>
<td></td>
</tr>
</tbody>
</table>

If **Work Order Generation Method** is set to **One work order per asset**, you can’t set a **Service Appointment Generation Method**.

Each asset and relevant maintenance work rule creates a work order. If a work type is associated with auto-create service appointment enabled, a service appointment is created for each work order.

**Example:** A maintenance plan with four assets, a generation time frame of 6 months, and a frequency of 1 month produces:

- Four work orders a month, 24 work orders for 6 months.
<table>
<thead>
<tr>
<th>Work Order Generation Method</th>
<th>Service Appointment Generation Method</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>One work order per asset</td>
<td>One work order line item per asset</td>
<td>A service appointment for each work order, if the auto-create service appointment is enabled on an associated work type.</td>
</tr>
<tr>
<td>One work order line item per asset</td>
<td>One service appointment per work order</td>
<td>Invalid: If Work Order Generation Method is set to One work order line item per asset, you must select a Service Appointment Generation Method.</td>
</tr>
</tbody>
</table>
| One work order line item per asset | One service appointment per work order line item | One parent work order is created, a work order line item is created for each asset and relevant maintenance work rule, and one service appointment is created for the parent work order, even if the associated work type doesn’t have auto-create service appointment enabled.  
Example: A maintenance plan with four assets, a generation time frame of 6 months, and a frequency of 1 month produces:  
• One work order each month, six work orders for 6 months.  
• Four work order line items on each work order.  
• A service appointment for each parent work order, 1 per month, and six work orders for 6 months. |

Why Aren’t Service Appointment Due Dates Following Maintenance Plan Settings? 

When a service appointment is created for a generated work order, the work type Due Date Offset overrides the due date set by the maintenance plan.  

To avoid this override, create two work types, one for non-maintenance plan service appointments and another for maintenance plan service appointments. Leave the Due Date Offset empty in the work type for maintenance plan service appointments. For example, create a Site Survey work type with a Due Date Offset of 5 days and Site Survey - Maintenance Plan with Due Date Offset left empty.
How Do I Change Generation Methods or Maintenance Schedules After Work Orders Are Generated?

If your maintenance plans have work orders or work order line items associated with them, changing their generation schedule on the maintenance asset or in the maintenance work rules isn’t recommended. To change maintenance plan generation frequencies, either delete the incomplete work orders and regenerate them or set an end date to expire the current maintenance plan and create one with the appropriate generation method and recurrences.

Manage Shifts

Shifts in Field Service let you define variable working periods for your shift-based workforce, such as contractors or on-call staff. Create shifts for particular dates and times when you need coverage, and assign them to service resources. When the managed package is installed, scheduling and optimization consider workforce availability during shifts.

IN THIS SECTION:

Create Flexible Work Shifts
Create shifts that define availability for your mobile workers and technicians. Shifts can vary from day to day or week to week so that you can assign workers for time periods that don’t follow a rigid pattern, such as rotating on-call duties or occasional overtime.

Manage Your Shift Schedule
Identify which shifts are covered, and which ones still require a worker to confirm that they’re available. The list view for shifts lets you examine upcoming shifts and their status. Switch to the schedule view to see shifts grouped by service territory or job profile in a calendar.

Guidelines for Shift Availability
Learn how to define valid shifts and show when your workers are available for shift work. Shifts can work alone or alongside operating hours and service territory memberships to define workforce availability. Designate shifts to show availability for specific types of work or tasks, or for specific territories. For example, you can designate an on-call shift for emergency appointments only.
Create Flexible Work Shifts

Create shifts that define availability for your mobile workers and technicians. Shifts can vary from day to day or week to week so that you can assign workers for time periods that don’t follow a rigid pattern, such as rotating on-call duties or occasional overtime.

1. From the App Launcher, click **Shifts**.
2. Do one of the following.
   - Click **New**.
   - From the schedule view, hover in an empty space and click **+ New Shift**.
3. Define the settings for the shift.
   a. Enter a label for the shift.
   b. Select a status.
      - Tentative—The shift is tentatively defined.
      - Published—The shift manager is ready to publish the shift to service resources.
      - Confirmed—The shift has an assigned service resource. The scheduling engine considers confirmed shifts.
   c. Enter dates and times for the shift’s start and end. A second set of time fields show the shift’s start and end in the time zone of the service territory.
   d. Optional: Optionally, select a service territory and a service resource.
      If you assign a service territory to the shift, the assigned service resource must be a member of the service territory.
   e. Optional: Optionally, for Time Slot Type, select the type of working hours included in the shift. Normal hours fall within the service resource’s normal working hours, while extended fall outside those hours (for example, overtime hours).
   f. Optional: Optionally, choose a job profile that defines the skills required to work during this shift.
   g. Optionally, choose a Background Color.
   h. Optionally, mark the shift Non-Standard.
   i. Optional: Optionally, choose a filter in the Recordset Filter Criteria field to limit which service appointments can be scheduled during the shift.

4. Save your changes.

Manage Your Shift Schedule

Identify which shifts are covered, and which ones still require a worker to confirm that they’re available. The list view for shifts lets you examine upcoming shifts and their status. Switch to the schedule view to see shifts grouped by service territory or job profile in a calendar.

1. From the App Launcher, click Shifts.
2. Navigate to a list view other than the Recently Viewed list view, such as the All Shifts list view or a custom list view. Click the dropdown menu next to the list view name, and select the name of the list view that contains the shifts you want to see.
3. Optionally, define filters to change which shifts appear.
4. To view upcoming shifts in a calendar, click ☑️ and select ⌚️.

- To see a calendar of shifts that are assigned to each job profile, click the Shifts tab.
- To see a calendar of shifts that are assigned to each service resource, click the Resources tab.

EDITIONS

Available in: Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

USER PERMISSIONS

To view shifts
- Field Service Standard AND
  View on Shift, Job Profiles, Service Resource, and Service Territory
Keep these considerations in mind when you work with shifts.

**General**

- To create a shift, choose from the New, New from Pattern, and New from Template actions. Or hover in an empty space and select + New Shift.
- In the calendar view, to see shift assignments in the time zone of the resource, turn on the Territory Time Zone toggle. Toggle it off to see the schedule in your time zone.
- If the managed package is installed, availability for confirmed shifts appears on the Gantt.

**Color-coding and icons**

- A horizontal color stripe on each shift shows the status. You can’t customize the status color-coding. The colors are:
  - Tentative—orange
  - Published—blue
  - Confirmed—green

- Background colors can identify or highlight shifts of different types. You set the background color on the shift, or the color is inherited from the shift template.
- Resource absences are shown on the shift schedule. Absence cells are color-coded with a gray background.
- Nonstandard shifts are marked with a red icon.

**Limitations**

- Up to 300 resource absences display in the Shift tab. If a resource belongs to multiple territories, you see an absence for the resource in each service territory.
- In the Shifts tab, you can’t use the quick search box to filter.
- The NOT operator isn’t supported when you define filter logic for shifts. If your filter logic uses NOT, we recommend adjusting the filter type instead, for example by using the does not contain operator.
Guidelines for Shift Availability

Learn how to define valid shifts and show when your workers are available for shift work. Shifts can work alone or alongside operating hours and service territory memberships to define workforce availability. Designate shifts to show availability for specific types of work or tasks, or for specific territories. For example, you can designate an on-call shift for emergency appointments only.

Filter criteria let you match service appointments to shifts, so that only appointments matching the criteria get scheduled. After you set up your shift criteria, you can schedule appointments or use optimization to find the best schedule for your team and customers.

Considerations

For shifts to be valid, they must meet the following criteria.

All shifts

- To create shifts, you must have at least one service territory and one service resource that’s assigned to that service territory. A shift must be fully contained within a primary service territory membership for a service resource in that territory.
- When you schedule designated shifts for secondary service territories, use optimization rather than scheduling operations. Scheduling operations, such as Book Appointments or Get Candidates, don’t consider designated shifts with secondary service territories.
- Add the Timeslot Designated work rule to the scheduling policy for scheduling and optimization to respect shift and time slot designations. The Overtime field in the Service Resource Availability work rule enables scheduling service appointments on Extended shifts. You may need to add the Overtime field to the layout.
- Shift availability (Extended or Normal) must correspond across all of a resource’s service territories.
- Add the Limit Non-Standard Shifts scheduling rule to balance less desirable shifts amongst your team. The Non-Standard field on shifts marks the shift as nonstandard.

Shifts with a specified service territory

- When you create a shift with a specified service territory, the shift’s time span must be fully contained within the service resource’s primary service territory membership for that territory.

Shifts without a specified service territory

- When you want to define workforce availability across many territories, create the shift without a specified territory. A shift without a specified service territory must be fully contained in a primary service territory membership (STM). It adds availability in all territories based on territory memberships; availability is added where the shift intersects service territory memberships.
Scheduling, Optimization, and Shift Availability

When the managed package is installed, scheduling and optimization consider workforce availability during shifts.

- When you schedule work using the dispatcher console or Book Appointments or Candidates global actions, scheduling uses availability from confirmed shifts. Optimization also uses available resources from confirmed shifts.
- Scheduling and optimization ignore job profiles and time slot types (normal or extended) that are defined in shifts.
- Shifts relax time slots for designated work or extended work (overtime). For example, if you assign a time period for emergency work and create a shift that overlaps, scheduling can assign non-emergency appointments during the shift. Or, if you create a shift for weekend on-call duties, you can schedule appointments although the shift is during extended hours.
- For shifts that aren’t territory-specific, you can apply work rules to narrow the territories in which scheduling uses shift availability. To use shift availability in the primary service territory, use a Match Territory work rule in your scheduling policy. To use shift availability in the primary and other territories, use the Working Territories work rule.
- Scheduling and optimization match shifts to service appointments according to the shift’s filter criteria.
- Shifts always add availability.
- Shifts have priority over overlapping time slots.
- When Shifts overlap for a certain resource, territory-specific shifts have priority over shifts that aren’t territory-specific.
- When shifts overlap for a certain resource and the overlapping shifts are both territory-specific or both non territory-specific, the first shift of the day takes precedence.
- When you use the Get Candidates and Mass Shift Update features, the scheduling logic takes into account any scheduling rules and objectives.
- If a service resource is unavailable during the day at a specific time slot or during a specific shift, you must indicate this using Resource Absence, and not split availability. For example, if a resource is available on Wednesday, 6 AM to 12 PM, and again from 1 PM to 6 PM, then extend availability from 6 AM to 6 PM and insert a Resource Absence between 12 PM and 1 PM.

Example: Adding Availability with Shifts

Rotating on-call duties are split into two shifts for Saturday morning and afternoon. The shift is associated with the San Francisco territory and is fully contained in the service territory membership. The shifts are assigned to two workers that have accepted the shift work. The managed package is installed in this org, so the Gantt displays the workers’ additional availability. When the dispatcher looks for candidates, scheduling considers availability from the confirmed shifts (1) and from service territory membership (2).
Manage Service Resources

Service resources are mobile workers that can be assigned to service appointments. Learn how to create time sheets and view a service resource’s travel routes and calendar.

IN THIS SECTION:

Get Started with Time Sheets
Before your mobile workers can start logging their hours using time sheets, lay down the foundation. Enable time sheets on the Field Service mobile app, set up an approval process, and customize time sheet fields.

Create Service Resource Absences for Field Service
Create resource absences to indicate when a service resource is unavailable to work. During schedule optimization, service resources aren’t assigned to appointments that conflict with their absences. View and manage absences from the Absences related list on service resource records.

View a Service Resource’s Daily Travel Route
The scheduling optimizer uses street-level routing to schedule your mobile worker’s day appropriately. On the day of service, the Field Service mobile app’s geocoding feature tracks the actual route taken. You can see both the planned and actual routes together on the resource map view.

View a Service Resource’s Calendar
Resource detail pages include a customizable calendar that shows the resource’s scheduled appointments and absences. The calendar gives dispatchers a snapshot of the resource’s availability, and helps resources stay on top of their schedule.
Get Started with Time Sheets

Before your mobile workers can start logging their hours using time sheets, lay down the foundation. Enable time sheets on the Field Service mobile app, set up an approval process, and customize time sheet fields.

1. **Enable mobile time sheets.**
   a. From Setup, enter *Field Service Mobile Settings* in the Quick Find box, then select *Field Service Mobile Settings*.
   b. Click *Edit* next to your Field Service Mobile Settings configuration.
   c. Select *Enable mobile time sheets*.
   d. Click *Save*.

2. **Create an approval process.**
   a. From Setup, enter *Approval Processes* in the Quick Find box, then select *Approval Processes*.
   b. Select *Time Sheet* from the drop-down menu.
   c. Click *Create New Approval Process > Use Jump Start Wizard*.
   d. Create an approval process with the Jump Start Wizard.

   **Note:** When a mobile worker submits a time sheet, it initiates your approval process. If you don’t have an approval process set up, workers can’t submit their time sheets.

3. **Customize fields for time sheets.**
   a. In the Object Manager, enter *Time Sheet* in the Quick Find box, then select *Time Sheet*.
   b. Select *Page Layout > Time Sheet Layout*.
   c. Under Time Sheet Detail, add or remove fields. Up to four fields can be shown on the Field Service mobile app.
   d. Click *Save*.

4. **Create time sheet templates** on page 104.

**Considerations for time sheets:**
- Users can view up to 100 past time sheets offline on their mobile devices.
- The first field on Time Sheet Detail displays as the header. Three more fields can be displayed as details below the header.

**IN THIS SECTION:**

*Create Time Sheet Templates*
You can automatically create time sheets from a template so that service resources can track their time and work. Specify the time period each time sheet covers, such as a week or month, and track specific tasks, travel time, and break time. Time sheets are created one day before their start date. You can only create time sheets for service resources of the type Technician.
Create Time Sheet Templates

You can automatically create time sheets from a template so that service resources can track their time and work. Specify the time period each time sheet covers, such as a week or month, and track specific tasks, travel time, and break time. Time sheets are created one day before their start date. You can only create time sheets for service resources of the type Technician.

1. From Setup, enter Time Sheet Settings in the Quick Find box, then select Time Sheet Settings.
2. Click New and enter details for the time sheet template.

- For Label, enter a descriptive name for the template so that you can distinguish it from others.
- For Name, enter an API name for the template, which uses underscores instead of spaces.
For Start Date, enter the date that you want the time sheet template to take effect. Because the time sheet autocreation job runs once per day, we recommend setting a start date that is at least 24 hours in the future.

For Frequency, select the time range that you want each time sheet to cover. New time sheets are automatically created on the frequency you specify. For example, if you select Daily, a time sheet is created every day. If you select Monthly, each time sheet covers an entire month, beginning on the start date that you entered.

For Work Week Start Day, select the day that you want each work week to begin on.

For Work Week End Day, select the day that you want each work week to end on.

Enter a description for the time sheet template.

Mark the time sheet template as Active.

Important: Time sheets are automatically created only if the template is marked Active.

3. Assign the time sheet template to user profiles.
   a. Click Assign to Profiles.
   b. Select at least one user profile that you want to assign the time sheet template to, and click Change Assignments.
   c. Under Time Sheet Setting, select the time sheet template you want the profiles to use, and click Save.

The template name appears next to each profile that you assigned it to.

To confirm that time sheets were created successfully, navigate to Time Sheets in the App Launcher, and create list view filters. If the autocreation process can’t create a time sheet, it doesn’t retry. If a time sheet isn’t created as expected, you can manually create it.

Important: Editing the frequency of an existing time sheet template isn’t recommended. To avoid errors, first deactivate the existing template. Then create a template with the correct frequency, mark it as active, and assign it to the desired user profiles.

Considerations for time sheets:
  • If you add a required custom field that uses custom values, time sheets aren’t automatically created.
  • Using the same work week start day and work week end day results in a work week that is one day long.
• The Twice a month frequency uses days 1–15 as the first half of the month and days 16–31 as the second half of the month.
• Start date defines the day your time sheet begins. So if your time sheet template's start date is on a Tuesday, your work week start day is Monday, and you set the frequency to every two weeks, the first time sheet starts on Tuesday. The time sheet autocreation job creates the first batch of time sheets when it runs on Monday. Thereafter, time sheets start on Mondays, and they are automatically created when the job runs on Sundays.
• Time sheet templates aren't included in updates to the managed package.

Create Service Resource Absences for Field Service

Create resource absences to indicate when a service resource is unavailable to work. During schedule optimization, service resources aren’t assigned to appointments that conflict with their absences. View and manage absences from the Absences related list on service resource records.

1. From the Absences related list on a service resource, click New. To create a set of regularly scheduled absences, click New Recurring Absence and fill out the form.
2. *Select Non Availability as the record type. The Break record type is used to automatically create breaks during schedule optimization.
3. Select an absence type: Vacation, Meeting, Training, or Medical.
   Tip: Add more absence types by updating the Type picklist on the resource absence object in Setup. Don’t use Break as a picklist value; the managed package uses that name.
4. Enter a start and end time and description.
5. *Optionally, add a Gantt label. The Gantt label appears on the absence in the Gantt. For example, Bahamas or Driver Training.
   Note: Gantt labels aren’t visible on Break resource absences.
6. Optionally, enter an address, such as a training location. For absences that don’t span an entire shift—like a morning medical appointment—the absence address is used to determine travel time to and from adjacent service appointments. Appointments aren’t scheduled during dedicated travel time.

To view resource absences:
• Read on service resources
To create and update resource absences:
• Read and edit on service resources
To add or edit picklist values:
• Customize Application
To customize the Field Service managed package:
• Customize Application

*If the Field Service managed package isn’t installed, you don’t see options to select a record type or enter a Gantt label.

The Gantt shows breaks to the left of travel to appointments. If a break is planned during travel time, optimization can still schedule the appointment. The resource can drive, take the break at the specified time, and then complete the travel.

If an absence doesn’t have an address, optimization uses the resource’s home base to calculate travel time to the next service appointment. For a more precise travel estimate, add an address to the absence, such as the location of the previous appointment or an address for the break.

Non Availability absences are shown on the Gantt with a “no entry” icon, while Break absences are shown with a teacup icon. Update the Gantt Color field on a resource absence to customize its color on the Gantt.
Note: If a service resource of type Crew has resource absences, those absences are considered in scheduling and shown on the Gantt. Absences associated with individual crew members’ corresponding service resources aren’t considered.

View a Service Resource’s Daily Travel Route

The scheduling optimizer uses street-level routing to schedule your mobile worker’s day appropriately. On the day of service, the Field Service mobile app’s geocoding feature tracks the actual route taken. You can see both the planned and actual routes together on the resource map view.

This is a Field Service managed package feature.

Important: To view travel routes, enable street-level routing.

To navigate to a service resource’s map, start from the dispatcher console resource list. Click Details in a resource’s action menu, and then click the Map tab. You can also view a service resource’s scheduled appointments on the main dispatcher console map by selecting the service resource in the Map Layers settings.
At the top of the map, select which date to show, and choose one or more types of data to display: **Route** (shown in blue), **Actual Route** (shown in pink), and **Traffic**. The actual route can be shown only if history tracking is set on the service resource’s Last Known Location field and geolocation tracking is turned on for them.

The truck icon signifies an appointment. The X icon signifies a resource absence with a valid address, meaning its latitude and longitude can be calculated.

**Note:** To show or hide resource absences on the map, from the App Launcher, find and open the **Field Service Admin** app, and then click **Field Service Settings**. Then, click **Dispatcher Console UI > Gantt Configurations** and select or deselect **Show absences on resource map**.

On the right-hand side of the map, you can show or hide the route details pane. To zoom in on an appointment, hover over the appointment number in the pane and click **Center on Map**.

**Note:** If a service resource has more than 23 stops in a period of 24 hours (including starting point, ending point, appointments, and absences), the resource map shows only the first 23 stops on the route and displays an error. This is a Directions API limitation.

### View a Service Resource’s Calendar

Resource detail pages include a customizable calendar that shows the resource’s scheduled appointments and absences. The calendar gives dispatchers a snapshot of the resource’s availability, and helps resources stay on top of their schedule.

**Note:** This is a Field Service managed package feature.

To view a service resource’s calendar, navigate to their detail page from the Service Resources tab and scroll to the Calendar tab. Click a field on a calendar entry to open the corresponding record in a new tab.

**Note:** If you don’t see the calendar on resource pages, add the VF079_ResourceCalendar Visualforce component to the service resource page layout.
Here’s how to control which information appears in the calendar.

1. To control which fields appear in calendar entries for service appointments and resource absences, customize field sets.
   - The Service Appointment Resource Calendar Display field set controls what information appears on the calendar entry.
   - The Service Appointment Resource Calendar Tooltip field set controls what information appears in a tooltip when you hover over the calendar entry.
   - The Resource Absence Resource Calendar field set controls what information appears on a resource absence calendar entry.
   - The Absence Resource Calendar Tooltip field set controls what information appears in a tooltip when you hover over the calendar entry.

   For more details, see Customize the Dispatcher Console with Field Sets.

2. To color-code resource absences on the calendar, update the Gantt Color field on resource absences with a 6-digit hex code.
   This field lets you represent different types of absences with different colors—for example, lunch breaks in red and internal meetings in green.

   **Tip:** Use Process Builder to automate the color-coding of resource absences.
Manage Service Crew Membership

Efficiently manage your service crews to accommodate a fast-changing field service schedule. Create crews, find and add members with the right skills, adjust membership dates to match appointment times, and view all crews’ schedules and members in one place.

While you can manually manage service crew membership from the Service Crew Members related list on service crew records, we recommend using the drag-and-drop crew management tool.

This is a Field Service managed package feature.

1. **Create your service crews.** The crew management tool only shows crews with an active service resource of type Crew.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in **Enterprise, Unlimited, and Developer** Editions.

USER PERMISSIONS

To view service crew members:
- Read on service crews
  - Read on service resources

To create service crews using the crew management tool:
- Create on service crews
  - Create on service resources
  - Edit on service territories

To create, update, or delete service crew members:
- Edit on service crews
2. Open the crew management tool by clicking the **Crew Management** tab or opening the Lightning page that contains it.

   **Note:** If you have trouble finding it, ask your admin to follow the steps in Set Up Crew Management and let you know where the tool is located.

3. In the top-right corner, select a date and number of days to display.

4. In the sidebar, click the map icon to view a list of territories with active service crews. Select territories whose crews you want to see and click **Save**. After you select territories, each crew’s schedule and members appear in the chart.

Now that your dates and service territories are selected, it’s time to manage crew membership.

**View Crew Details**

Hover over a crew name in the chart to see the skills that its members need. To update these skills, navigate to the associated service resource record of type Crew and update the Skills related list.
Hover over a service crew membership in the chart to view the membership start and end dates. Crew leaders appear with a star.

**View Appointment Details**

In any Crew Schedule row, hover over an appointment to view its details. A red flag icon means that the assigned service crew doesn’t yet comply with the minimum crew size or skill requirements listed on the appointment’s parent record. View skill and crew size alerts at the bottom of the hover window.

Double-click an appointment to open a window that shows the appointment’s fields and its parent record’s fields and related records.

**Find the Right Crew Member**

If the territory filter is visible in the sidebar, click the map icon to hide it and show the service resource list. The sidebar shows service resources who are members of the selected service territories during the dates shown on the chart.

- Click a service resource’s name in the sidebar to view their skills, service territory membership, and service crew membership.
- Click the card icon to the right of their name to view the service resource record.
- Select a scheduling policy using the Policy dropdown menu.
- Filter service resources by skill in one of two ways:
  - Click the filter icon in the resource list to select skills to filter for.
  - Click **Match Crew Skills** on a crew to show only service resources with the skills listed on the crew’s service resource record of type Crew.
• If an appointment shows missing skills or members, right-click the appointment and click **Get Candidates** to filter the resource list based on skills, availability, and operating hours. If the crew just needs members, all available resources are shown. If skills are missing, available service resources with the missing skills are shown first. Select one or more resources and click **Assign Selected** to add them to the crew for the appointment’s time frame.
Add a Service Resource to a Crew

Add service resources to crews by dragging them from the resource list. To add multiple resources at once, select them in the list before dragging.

- Drag a resource onto a crew’s name to add them to the crew for the dates shown on the chart. A window opens where you can update crew membership dates and make the resource the crew leader.
- Drag a resource onto another resource’s service crew membership to create an identical crew membership.
- Drag a resource onto an appointment to create a crew membership for the appointment’s time frame.
Edit or Delete Crew Membership
Double-click a crew membership in the chart to edit its dates, make the resource the crew leader, or delete the membership.

Manage Service Appointments

Learn how to create, schedule, reschedule, and unschedule service appointments. Tighten up your schedule by fixing overlaps, grouping nearby appointments, and filling schedule gaps.

IN THIS SECTION:

Create Service Appointments for Field Service
Service appointments represent field service visits to customers. While work orders describe the work to be performed, service appointments provide the scheduling and assignment details.

Schedule Service Appointments for Field Service
Schedule service appointments from the record feed or from the appointment list in the dispatcher console. You can also create scheduling dependencies between service appointments to organize larger jobs, or schedule an appointment by manually updating its status.

Unschedule Service Appointments
Unschedule service appointments from the dispatcher console or a service appointment record.

Reschedule Service Appointments
To reschedule service appointments, use the Book Appointment Chatter action or the Reshuffle action in the Gantt.

Fix Scheduling Overlaps
If a service appointment overlaps with other appointments or absences, use the Fix Overlaps feature to harmoniously reschedule appointments.

Group Nearby Appointments
To minimize travel time or gaps between appointments, use the Group Nearby Appointments action on a service appointment. This feature unschedules appointments that were scheduled later that day and replaces them with appointments that are close in location to the source appointment.

Fill Schedule Gaps
To fill gaps in a service resource's schedule, use the Fill-In Schedule feature. This feature creates a list of appointments for a mobile worker and finds the optimal schedule.

Customize Service Appointment Chatter Settings
Control whether custom Gantt Chatter posts, dispatch posts, and emergency posts are shared on service appointments or on service appointment parent records.
Dispatch Service Appointments
Dispatch scheduled service appointments to your mobile workers. You can dispatch appointments from the console, or set up jobs that automatically dispatch or drip feed the next appointments.

Create Service Appointments for Field Service

Service appointments represent field service visits to customers. While work orders describe the work to be performed, service appointments provide the scheduling and assignment details.

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

1. From the Service Appointments tab or the Service Appointments related list on a record, create a service appointment.

2. Fill out the General Information section.
   a. Add an appointment subject and description.
   b. If needed, update the duration. If the parent record is a work order or work order line item, the appointment inherits its duration from its parent.
   c. Fill out the Earliest Start Permitted and Due Date, which together represent the window during which the appointment must be completed. These fields typically represent terms in the customer’s service-level agreement.
   d. In the Service Note field, add notes such as an appointment summary or recommendations. Depending on your settings, these notes can appear on customer-facing service reports.

3. Fill out the Scheduled Times section.
   a. Add scheduled start and end times. If you’re using the Field Service managed package with schedule optimization, these fields are populated when the appointment is scheduled.
   b. Optionally, define an arrival window, which is the window of time when the mobile worker is expected to arrive at the site. This window is typically larger than the scheduled start and end window to allow time for delays and scheduling changes. You may choose to share the arrival window start and end with the customer, but keep the scheduled start and end internal-only.

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

Note:

- Service resource who are dispatchers can’t be assigned to service appointments.
- In the Gantt, service appointments are labeled using their appointment number. To customize a service appointment’s label, fill in the Gantt Label field on the appointment record.
- If an assignment is made during scheduling or optimization—Field Service managed package features—assigned resource records are automatically created.
- If an appointment has more than one assigned resource, only the first created assigned resource is recognized in scheduling and in the dispatcher console. However, if the appointment is assigned to a service resource of type Crew, assigned resource records are auto-created for the crew members, and the assignment details are displayed correctly in the dispatcher console.
5. When the mobile worker completes the appointment, have them fill out the Actual Times section to indicate when the appointment started and ended. In addition, they can enter the minutes it took to travel to the appointment in the Actual Travel Time field on their assigned resource record.

If Auto-Create Service Appointment is selected on a work type, a service appointment is created when a work order or work order line item lists that work type. For details, see Create Work Types for Field Service.

IN THIS SECTION:
Guidelines for Creating Service Appointments for Field Service

A service appointment tracks field service work to be performed for a customer, and is typically associated with a work order or work order line item. Learn how to create and manage service appointments.

Guidelines for Creating Service Appointments for Field Service

A service appointment tracks field service work to be performed for a customer, and is typically associated with a work order or work order line item. Learn how to create and manage service appointments.

View Service Appointments
View service appointments in the following places:
- Service Appointments tab
- Service Appointments related list on work orders, work order line items, or service resources
- Dispatcher console

Create Service Appointments
Create service appointments from the Service Appointments tab or related list, or with the Book Appointment, Candidates, and Emergency Chatter actions in a record feed.

Note: On the Service Appointments related list on a service resource record, you can’t create appointments, but you can assign the resource to existing appointments.

Delete Service Appointments
If an appointment is canceled, you can delete the appointment or change its status to Canceled. Deleting a parent record, like a work order, deletes its child service appointments.

Associate Service Appointments with Other Records
Service appointments always have a parent record, which can be a work order, work order line item, opportunity, account, or asset. The 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 track scheduling and ownership. If you select Auto-Create Service Appointment on a work type, a child service appointment is added to all work orders or work order line items that use the work type. In scheduling and optimization, service appointments are scheduled according to your settings.
- 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.
Schedule Service Appointments for Field Service

Schedule service appointments from the record feed or from the appointment list in the dispatcher console. You can also create scheduling dependencies between service appointments to organize larger jobs, or schedule an appointment by manually updating its status.

IN THIS SECTION:

Schedule Appointments from the Record Feed
Use the Book Appointment or Candidates Chatter actions to schedule and reschedule service appointments for work orders, work order line items, accounts, assets, leads, and opportunities, or from a service appointment itself. To reflect different visits, you can schedule one or more service appointments for a record.

Schedule Appointments from the Dispatcher Console
You can schedule service appointments from the Field Service dispatcher console by using the mass schedule action or by dragging them onto the Gantt.

Schedule an Appointment Automatically
Schedule an appointment in a hurry with Auto Schedule—right from the appointment itself. Auto Schedule finds the best available slot based on your scheduling policy.

Create Scheduling Dependencies Between Service Appointments
To stay on top of complex projects, create scheduling dependencies between related service appointments. For example, ensure that a particular appointment can’t start until a related appointment is complete.

Schedule Emergency Appointments
Swiftly schedule, dispatch, and track emergency appointments with the help of a real-time map view. The Emergency Chatter action on a service appointment shows a map view of your closest field resources so that you can dispatch work immediately.

Schedule Appointments Using Priorities
Schedule critical service appointments over less urgent visits. When a scheduling action can’t find an available time slot, it overlaps lower priority appointments with services that you specify as high priority.

Update an Appointment’s Status
You can schedule or unschedule an appointment by updating its status. An appointment’s status can be updated from several places in Salesforce.
## Schedule Appointments from the Record Feed

Use the Book Appointment or Candidates Chatter actions to schedule and reschedule service appointments for work orders, work order line items, accounts, assets, leads, and opportunities, or from a service appointment itself. To reflect different visits, you can schedule one or more service appointments for a record.

- **This is a Field Service managed package feature.**
- **Tip:** For help scheduling emergency appointments, see Schedule Emergency Appointments.

<table>
<thead>
<tr>
<th>Action</th>
<th>Used By</th>
<th>Options Provided</th>
</tr>
</thead>
</table>
| Book Appointment | Support agents or customers. For example:  
  - Agents can use it to book an appointment for a customer over the phone  
  - Customers can use it if the action is embedded in your Experience Builder site  
  - **Note:** To ensure that Experience Builder site users have sufficient access to the data required to perform appointment booking, we recommend using the Appointment Booking Communities Lightning component, and not the standard Visualforce component. | Arrival windows, which are based on the default operating hours selected in your appointment booking settings.  
  - **Note:** If you’ve added customer-specific operating hours to an entitlement on the related work order, the options provided are based on those hours. |
| Candidates    | Typically, only support agents. | Appointment time slots, organized by service resource. The time slots are based purely on empty space in mobile worker schedules, not arrival windows, making this action ideal for appointments where no coordination is needed with the customer. |
1. Open the record that requires an appointment.

2. In the Chatter feed, select either **Book Appointment** or **Candidates** based on your needs. If the action isn’t available, select the page layout and add the quick action. For appointment booking, we recommend that you add the action; don’t add the AppointmentBookingVf Visualforce page using Lightning App Builder.

   **Note:** Avoid putting the **Book Appointment**, **Candidates**, and **Emergency** chatter quick actions in Salesforce Classic Publisher and Salesforce Mobile and Lightning Experience as the first actions in your page layout to prevent triggering these actions every time a record is loaded.

3. If you’re creating an appointment for a work order or work order line item, leave the work type as is. It’s defined on the parent record and can’t be updated from the Chatter action window.

   The work type serves as a template that provides skill requirements, duration, and other data used in scheduling the work.

4. Optionally, update the address and service territory, which are typically inherited from the parent record.

   **Note:** When an appointment isn’t geocoded with a latitude and longitude, Book Appointment geocodes it and formats the address as follows.

   - Street number and Street name (the number is always first)
   - City, State, Zipcode
   - Country

5. To view time slots for yourself only, click **Assign to Me**. You see this option if you’re associated with a service resource record and the default scheduling policy includes a **Required Resources work rule**.

6. If you clicked **Book Appointment**:
   a. To change the earliest start permitted and due date, click **Show more options**.
   b. To view a graded list of available arrival windows, click **Get Appointments**. The list considers all scheduling constraints, such as the current schedule and work rules, and is graded according to the service objectives. Depending on your **appointment booking settings**, arrival windows can be flagged as Ideal or Recommended or shown in yellow to indicate a prime window. To see how each window ranks against the scheduling policy’s service objectives, click its information icon.
   c. To view a wider range of service appointment dates, click **Extend Dates**.
   d. To create the service appointment, select an arrival window. You can then view its details.

7. If you clicked **Candidates**:
   a. Click **Get Candidates** to view a list of available service resources.
   b. Click a resource’s name to view their open time slots, which are scored 0–100 based on how well the slot matches the applied scheduling policy.
   c. To schedule the appointment, select a time slot in a resource’s list and click **Schedule to [name]**.

8. To rerun the search using a different scheduling policy than the default policy, select a policy in the **Change Scheduling Policy** field.

   **Book Appointment Window**
Candidates Window
Note: Booking from objects other than work orders or work order line items creates a work order, and the service appointment is created for that work order. For instance, booking an appointment from an asset record creates a related work order and service appointment.

Note: Choosing the same or adjacent appointment slots at the same time can create overlaps on the dispatch console. Service appointment overlaps can occur if there are long-running customizations. We recommend such customizations be asynchronous. Travel or lunch break overlaps can also occur. Contact your Salesforce rep to change the custom setting that checks for appointment changes during the entire day, and prevents travel overlaps. In this case, false positive errors can occur if there’s no real overlap.

Schedule Appointments from the Dispatcher Console
You can schedule service appointments from the Field Service dispatcher console by using the mass schedule action or by dragging them onto the Gantt.

This is a Field Service managed package feature.

Drag an Appointment from the Appointment List to the Gantt
Schedule an appointment by dragging it from the appointment list into any service resource’s row on the Gantt.
If the assignment causes a rule violation (for example, if the resource doesn’t possess the required skill), the appointment is marked with a yellow triangle. Hover over the appointment to view its details and rule violations.

Note: Rule violations occur only when a service appointment is scheduled using the dragging method.

Customize the drag settings from the Field Service Admin app.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Click Dispatcher Console UI.
3. In the Drag jumps on Gantt field, enter the minutes segment. For example, if you enter 15, you can drag an appointment into slots starting at 0, 15, 30, and 45 minutes after the hour.
4. Save your changes.

Schedule an Appointment from the Map

Schedule an appointment directly from the dispatcher console map. First, pop out the map by clicking on the Map tab, and then click an appointment icon (1) to display its details. Click Schedule (2) to schedule the appointment, or drag the shaded appointment icon (3) from the details window into any service resource’s row on the Gantt. If you use the dragging method, the information above about rule violations applies.

Schedule an Appointment from the Mini View

Click a service appointment in the appointment list to show a mini view of the appointment. At the bottom of the mini view, click Schedule. The service appointment is scheduled according to the scheduling policy selected at the top of the appointment list.

If no candidates are available, you can bypass the scheduling policy’s rules and objectives or select a different scheduling policy.

Use the Mass Schedule Action

Select one or more appointments in the appointment list, and click Schedule above the appointment list search field. Appointments are scheduled in priority order. A progress bar appears in the bottom right corner during the scheduling process.

When scheduling is complete, click View Service Appointments to review the details.
Schedule an Appointment Automatically

Schedule an appointment in a hurry with Auto Schedule—right from the appointment itself. Auto Schedule finds the best available slot based on your scheduling policy.

⚠️ This is a Field Service managed package feature.

To grade available time slots, Auto Schedule uses rules and objectives in a scheduling policy. In the Field Service Admin app, specify the default policy in Field Service Settings > Dispatcher Console UI > Gantt Configurations. To override the default, add the Scheduling Policy Used field to the service appointment layout. Before you auto-schedule the appointment, select a scheduling policy in this field.

1. Customize the service appointment page layout, and add the Auto Schedule field. Optionally, add the Scheduling Policy Used field.

2. Open the service appointment that you want to schedule, and select Auto Schedule. Optionally, select a scheduling policy to use instead of the default policy.

3. Click Save.

If Auto Schedule is selected on a service appointment, wait until the appointment’s location is geocoded before scheduling it. In the Field Service Admin app, under Field Service Settings > Scheduling > General Logic, select Delay auto-scheduling until appointments are geocoded and save your changes.

Note:

- The Delay auto-scheduling until appointments are geocoded setting doesn’t apply to appointments without an address (such appointments are scheduled without delay). Auto Schedule uses the scheduling policy listed in the appointment’s Scheduling Policy Used field. If no policy is listed, the default scheduling policy in your Appointment Booking settings is used.

- Delay auto-scheduling until appointments are geocoded works only if the Data Integration Rule for Service Appointment Address has Bypass triggers turned off.

- We recommend waiting for the Auto Schedule to complete before updating a service appointment, otherwise your update could trigger the Auto Schedule before the service appointment is geocoded.

Auto Schedule tries to find the best slot for the appointment. It’s then deselected in the appointment record regardless of whether scheduling is successful.
Create Scheduling Dependencies Between Service Appointments

To stay on top of complex projects, create scheduling dependencies between related service appointments. For example, ensure that a particular appointment can’t start until a related appointment is complete.

This is a Field Service managed package feature.

Prepare to Create Dependencies

Enable the scheduling dependencies feature, known as complex work, and update page layouts.

1. Enable complex work. If it isn’t enabled, you can still create relationships between appointments, but simultaneous scheduling isn’t guaranteed.
   a. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
   b. Click Scheduling > General Logic.
   c. Under Complex Work, select Enable complex work.
   d. If you want related service appointments to always be scheduled in the same scheduling operation, select Use all-or-none scheduling for related appointments. This setting prevents two service appointments with a dependency between them from being scheduled separately. It doesn’t apply to chains of three or more appointments.

2. Customize the service appointment page layout to show complex work features.
   a. In the layout editor, open the service appointment page layout.
   b. Add a single-column section to the layout. Name it Scheduling Dependencies or something similar.
   c. Select Visualforce Pages and drag the vf739_ComplexWork page to the new section.
   d. Click the wrench icon on the Visualforce page to display its properties. Set the height in pixels to 600.
   e. Remove the following fields from the service appointment page layout. These fields were used before complex work was available, and aren’t needed. If these fields appear in their own section, remove the section.
      • Time Dependency
      • Same Resource
      • Same Day
      • Related Service
   f. Save your changes.

3. From the Object Manager in Setup, open the Appointment Dependency object. Under Fields & Relationships, select the Dependency field. Activate the dependency values that you want to be available for complex work.

Create Dependencies

You can create dependencies between two or more existing service appointments. Each appointment’s parent record must be a work order.

1. On a service appointment detail page, find the Scheduling Dependencies section.
2. Select two appointments to relate to each other.
3. Select a dependency type:
• Same Start: The appointments must start together.
• Start After Finish: One appointment cannot start until the other is completed.
• Start After Finish and Same Day: One appointment cannot start until the other is completed, and they must be scheduled for the same day.
• Immediately Follow (beta): The appointments must be scheduled back-to-back on the same day without any interruption, and they must be scheduled to the same resource.

4. Optionally, require the appointments to be assigned to the same service resource.

5. Click Create Dependency.

For example, suppose a customer calls to report a leaking skylight that has damaged a section of the ceiling. The support agent creates a work order to address the problem, and adds two service appointments: one to fix the skylight (SA-0064), and one to repair the ceiling (SA-0063). The skylight must be fixed before the ceiling is repaired, so the agent creates the following dependency.

![Add Dependencies](image)

After the agent adds the dependency, it's visible in a diagram and in a list at the bottom of the Scheduling Dependencies section.

![Scheduling Dependencies](image)
You can now schedule the appointments. Appointments with dependencies can be scheduled in the usual ways—scheduling quick actions, the dispatcher console, and optimization—or by clicking Schedule Appointments in the Scheduling Dependencies section.

IN THIS SECTION:

Considerations for Scheduling Dependencies
Keep these considerations in mind when you schedule dependencies between service appointments.

Considerations for Scheduling Dependencies
Keep these considerations in mind when you schedule dependencies between service appointments.

This is a Field Service managed package feature.

General Considerations
When you set up appointments with scheduling dependencies, known as complex work, keep these points in mind.

• Except for consecutive work, you can create dependencies between more than two appointments. However, when you schedule a chain of appointments, dependencies are enforced for two appointments at a time, even if you select Use all-or-none scheduling for related appointments. For a chain of more than two appointments, we can’t guarantee that scheduling and optimization schedule all appointments in the chain. For example, for a chain of four appointments, the first two appointments might be scheduled but not the third or fourth.

• To view a service appointment’s related appointments, right-click the appointment on the Gantt and select Show related.

• To control which fields are shown in the search results, modify the Service Appointments List Columns field set.

• Capacity-based resources can’t be assigned to appointments that are part of an appointment chain.

• If a chain of appointments spans multiple service territories, you must select all territories in the optimization request for the appointments to be scheduled.

• The combination of multiday scheduling and complex work isn’t supported. If a multiday service appointment is part of a chain of appointments, its scheduled end date isn’t calculated when the appointment is scheduled.

• To be considered for Same Resource dependencies, each service resource must have a single service territory membership. A chain of appointments in complex work can’t span different service territory memberships.

• Experience Builder site dispatchers can’t access this feature.

Consecutive Work Considerations
You can create consecutive work with an Immediately Follow dependency (beta). Be aware of the following considerations and limitations.

• We prevent the creation of Immediately Follow dependencies for chains of more than two service appointments.

• Optimization enforces this dependency for chains of two service appointments.

• Scheduling and optimization don’t support predictive travel, crews, resource efficiencies, reshuffle actions, fixed gaps, or multiday work with consecutive work appointments.

• Breaks aren’t supported; scheduling and optimization overlap breaks with consecutive appointments and may result in rule violations.

• The org-wide setting for travel speed is used to calculate travel time between consecutive appointments.
• If you reschedule consecutive appointments, the scheduling logic doesn’t consider the second appointment’s original slot as an available slot.
• If the first appointment is scheduled successfully but not the second, scheduling and optimization don’t unschedule the first appointment.

Schedule Emergency Appointments

Swiftly schedule, dispatch, and track emergency appointments with the help of a real-time map view. The Emergency Chatter action on a service appointment shows a map view of your closest field resources so that you can dispatch work immediately.

This is a Field Service managed package feature.

Schedule an Emergency Appointment

1. From any standard or custom object record, click the Emergency action in the Chatter feed. If you don’t see the action, ask your admin to add it to the page layout.
2. Select a work type, address, and service territory, and click Emergency Dispatch to generate a list of available service resources and display a map of your team. Click a resource on the map to see:
   • Their route to the emergency service and ETA.
   • The data (breadcrumb) that their location is based on. The Last known location validity field in the emergency booking settings controls the location logic.
   • A Dispatch button, which assigns the appointment to them.
3. If you’re having trouble finding a candidate, select a different scheduling policy directly on the map or modify your emergency booking settings.

Tip:
• If you want a candidate to complete their current appointment before heading to the emergency appointment, change the dispatcher setting on the map from “as soon as possible” to “after current Service Appointment”. Changing this setting updates the candidates’ ETA.
• Click Candidates to view a list of all candidates organized by ETA. Hover over a resource name in the list to see options to dispatch them or view them on the map.
• Quickly spot emergency appointments in the Gantt by looking for the lightning icon.

Note: Emergency service appointments don’t consider status transitions when their status is changed to any status in the Dispatched status category.

Customize Emergency Booking Settings

From the App Launcher, find and open the Field Service Admin app, and then click Field Service Settings. Then, click Global Actions > Emergency Wizard.
<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency scheduling policy</td>
<td>The default policy that is used to find resources to assign to an emergency appointment. We recommend using an Easy policy with softer rules to ensure that more candidates are returned.</td>
</tr>
<tr>
<td>Last known location validity</td>
<td>The number of minutes after which a data breadcrumb—like resource location or geolocation—is no longer valid. For example, if the breadcrumb validity is 20 minutes and the Last Known Location of resource X was last updated 30 minutes prior, the emergency dispatcher calculates the resource’s ETA based on the location of the last appointment they completed, or (if no appointments were completed that day) their home base. The home base is the resource’s service territory member address, or if not applicable, their service territory address.</td>
</tr>
<tr>
<td>Ideal availability grade</td>
<td>The grading of candidates, which is color-coded. In the breadcrumbs example:</td>
</tr>
<tr>
<td>Good availability grade</td>
<td>• Resources who can reach the appointment in less than 30 minutes are ideal candidates.</td>
</tr>
<tr>
<td></td>
<td>• Resource who can reach the appointment between 30 and 60 minutes are good candidates.</td>
</tr>
<tr>
<td></td>
<td>• Resources who can reach the appointment after 60 minutes are bad candidates.</td>
</tr>
<tr>
<td>Emergency search timeframe</td>
<td>The amount of time you have to resolve the emergency, not counting the appointment duration. The Earliest Start Permitted on the appointment is set to the current time, and the Due Date is the current time + appointment duration + Emergency Search Timeframe.</td>
</tr>
<tr>
<td></td>
<td>For example, if an appointment requires 1 hour of work and the Emergency Search Timeframe is 360 minutes (6 hours), the emergency wizard shows only resources who can travel to and complete the task in the next 7 hours.</td>
</tr>
<tr>
<td>Allow Chatter post</td>
<td>In an emergency appointment dispatch, the dispatcher is shown the option to make a custom Chatter post or not post at all. If this option isn’t selected, no Chatter post is made.</td>
</tr>
<tr>
<td>Emergency Chatter Post Destination</td>
<td>Choose whether the Chatter post notifying the assigned resource about the appointment is added to the appointment’s feed or its parent record’s feed.</td>
</tr>
<tr>
<td>Pin After Dispatch</td>
<td>Pin the appointment after it is dispatched.</td>
</tr>
</tbody>
</table>

**Note:** If the Emergency Chatter action is used for an appointment with a scheduling dependency, the dependency isn’t considered during scheduling.
Schedule Appointments Using Priorities

Schedule critical service appointments over less urgent visits. When a scheduling action can’t find an available time slot, it overlaps lower priority appointments with services that you specify as high priority.

This is a Field Service managed package feature.

If you have just a few urgent appointments, you can use priorities with scheduling actions, such as Get Candidates, Book Appointments, or Schedule. Identify what drives your priorities first. Then you’re ready to configure Field Service so that scheduling actions can prioritize visits.

1. Specify a priority field.

In the Field Service Admin app, under Field Service Settings > Scheduling > General Logic, select a priority field. You can choose one or more fields on service appointments, work orders, and work order line items.

- Assign a fixed priority. For example, the managed package provides the Scheduling Priority field on parent work orders and work order line items. By default, Scheduling Priority values are 1–4, where 1 is Critical and 4 is Low.

- Create a dynamic priority field using a custom formula field. For example, create a formula that sets appointment priorities based on the difference between today’s date and the due date.

Scheduling and optimization look at the service appointment priority field first. If that field is not defined or empty, then the appointment’s priority is derived from the field on the parent work order or work order line item.

2. Select a priority scale.

The default priority range is a 1–10 scale, where 1 is the highest priority and 10 is the lowest priority. The 1–10 scale works well for most priority cases. If your use case requires a broad range of values, go to Field Service Settings > Scheduling > General Logic in the Field Service Admin app, and select the optional 1–100 scale.

3. Customize the service appointment page layout, and add the field Schedule over lower priority appointment.

When you select this Boolean field on an appointment, scheduling actions consider the appointment’s priority.

4. Schedule appointments and resolve any overlaps.

You can create a scheduling recipe to fix overlaps or use In-Day optimization.

Example: To schedule an urgent break-fix, create a work order and set its priority to 1. Open the related service appointment, and click Schedule over lower priority appointment. Then, in the dispatcher console, select the critical break-fix appointment from the appointment list. You can use any of the scheduling actions, such as Book Appointments or get Candidates.

Scheduling ignores lower priority appointments, even if an overlap results. For example, when you click Candidates, the Gantt shows available time slots, including slots that overlap lower priority appointments. For an appointment with a priority of 2 (High), scheduling considers slots that overlap appointments with a priority of 3 (Medium), 4 (Low), or a higher value.
Considerations:

- When scheduling considers slots for the appointment, it protects already scheduled appointments that have Schedule over lower priority appointment set.

- When you have many high priority appointments to schedule, use In-Day or Global optimization. Optimization considers priority fields and reschedules lower priority appointments if possible. Optimization doesn’t use the Schedule over lower priority appointment field.

Update an Appointment’s Status

You can schedule or unschedule an appointment by updating its status. An appointment’s status can be updated from several places in Salesforce.

This is a Field Service managed package feature.

From the Gantt

In the Gantt, select one or more appointments whose status you want to change. To select multiple appointments, hold down Command or Control while clicking the appointments. Then, right-click your selection, hover over Change status, and select a new status.

From a Service Appointment Record

Open a service appointment record or click Details on an appointment from the Gantt. From here, you can change the status in two ways:
From the Feed tab, click the **Change Status** Chatter action and select a status. Only status values that are permitted in your service appointment life cycle settings are shown.

- Manually update the appointment's Status field. All status values are shown, but the status change works only if it follows your service appointment life cycle settings.

**From a Scheduled Job**

The Auto Dispatch scheduled job allows the automatic dispatch of assigned appointments. It changes the status of the chosen appointments from Scheduled to Dispatched.

To modify this job, from the App Launcher, find and open the **Field Service Admin** app, and then click **Field Service Settings**. Then, click **Dispatch > Scheduled Jobs**.

**Unschedule Service Appointments**

Unschedule service appointments from the dispatcher console or a service appointment record.

> **Note:** Deleting the assigned resource record associated with a service appointment, or unscheduling a service appointment from the Gantt causes the service appointment status to switch to the **None** default value shown for New Service Appointment in the managed package **Field Service Settings > Service Appointment > Service Appointment Life Cycle > SA Status**.

- In the Gantt, right-click an appointment and select **Unschedule**. To select multiple appointments, hold down Control or Command while clicking appointments. Unscheduling an appointment from the Gantt is the same as deleting the assigned resource record.

- From a service appointment details page, update the Status field to **None**.

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

The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.
Reschedule Service Appointments

To reschedule service appointments, use the Book Appointment Chatter action or the Reshuffle action in the Gantt.

This is a Field Service managed package feature.

To manually reschedule a service appointment, use the Book Appointment Chatter action.

1. Open the parent record—typically a work order or work order line item—of the service appointment that you want to reschedule.
2. In the Chatter feed, select Book Appointment.
3. Update the appointment settings as needed.
4. Click Get Appointments to view a list of available slots.
5. Select your new appointment window.

To make space in a full schedule for a high-priority appointment, use the Reshuffle action in the Gantt. This action postpones lower-priority appointments.

1. Customize your reshuffle preferences.
   a. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
   b. Click Scheduling > Dynamic Gantt.
   c. Under Reshuffle Assignments, define the time period in which lower-priority appointments can be postponed. When appointments are rescheduled, lower-priority appointments are rescheduled during the time period between their Earliest Start Permitted—or the current date, if the Earliest Start Permitted has passed—and this many days later.
   d. Save your change.
2. Reshuffle your schedule to accommodate a high-priority appointment.
   a. To open the dispatcher console, from the App Launcher, find and open the Field Service app, and then click Field Service.
   b. Find the appointment in the appointment list (or on the Gantt, if it’s already scheduled). Right-click the appointment and select Reshuffle. This action can reschedule or unschedule lower priority appointments and reschedule higher priority appointments (though not past their due date).

Fix Scheduling Overlaps

If a service appointment overlaps with other appointments or absences, use the Fix Overlaps feature to harmoniously reschedule appointments.

This is a Field Service managed package feature.

Customize Overlap Settings

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab. Then, click Scheduling > Dynamic Gantt.
2. Under Fix Overlaps, configure the following settings.
### Setting

<table>
<thead>
<tr>
<th>Description</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>If this option is selected, overlaps are automatically fixed whenever an appointment overlaps with another appointment or an absence.</td>
<td>Automatically fix overlaps when an appointment overlaps with another appointment or absence</td>
</tr>
<tr>
<td>Assign rescheduled appointments only to the original assigned resource.</td>
<td>Schedule to original resource only</td>
</tr>
<tr>
<td>Consider all qualified service resources when rescheduling appointments.</td>
<td>Schedule to all resources</td>
</tr>
<tr>
<td>Choose whether unscheduled appointments are rescheduled in order of priority or in the original schedule’s order.</td>
<td>After unscheduling services reschedule them by</td>
</tr>
<tr>
<td>If an appointment can’t be rescheduled without breaking work rules, leave the appointment in its original time slot with an In Jeopardy flag.</td>
<td>When unable to find a valid schedule for an appointment</td>
</tr>
<tr>
<td>If an appointment can’t be rescheduled without breaking work rules, unschedule the appointment and remove it from the Gantt.</td>
<td>Leave on Gantt and set In-jeopardy:</td>
</tr>
<tr>
<td>Use the Reshuffle action. This action reschedules appointments to favor high-priority appointments. To learn more, see Reschedule Service Appointments.</td>
<td>Reschedule other assignments:</td>
</tr>
</tbody>
</table>

**Note:** The Fix Overlaps feature in the managed package dynamic Gantt is used to reschedule overlapping appointments according to your configured settings. For example, when unable to find a valid schedule for an appointment, you can select to put the appointment in jeopardy, unschedule it, or reschedule other assignments. This is not to be confused with the Fix Overlaps option in the scheduling policy. In this case, if Fix Overlaps is selected, existing service appointment overlaps are addressed during in-day or global optimization (overlaps with Resource Absences are ignored). When overlaps are being fixed, the overlapping appointments are unscheduled. If the optimization engine is unable to find a valid schedule for any appointments, these appointments remain unscheduled. If Fix Overlaps isn’t selected, overlaps are left as is.

### Considerations

- Fix Overlaps respects the original order of scheduled appointments. The earliest appointment remains the earliest and the last remains last.
- If an appointment is pinned, Fix Overlaps doesn’t reschedule it. However, appointments with a pinned status can be rescheduled.
- Fix Overlaps reschedules appointments only within the given day. If the operation progresses to use the Reshuffle action, appointments can be rescheduled to another day.
- Fix Overlaps doesn’t automatically reschedule appointments when you create or update a resource absence that overlaps with a service appointment.
- Fix Overlaps considers only service appointments in the **Scheduled** or **Dispatched** Status Category.
- Fix Overlaps doesn’t run on past service appointments.
- Fix Overlaps isn’t supported for capacity-based resources.
- Fix Overlaps doesn’t update service appointment status.
- When a service appointment is scheduled by Fix Overlaps, the appointment’s Schedule Mode is set to **Automatic**.

## Group Nearby Appointments

To minimize travel time or gaps between appointments, use the Group Nearby Appointments action on a service appointment. This feature unschedules appointments that were scheduled later that day and replaces them with appointments that are close in location to the source appointment.

*This is a Field Service managed package feature.*

### Customize Appointment Grouping Settings

1. From the App Launcher, find and open the **Field Service Admin** app, and then click the **Field Service Settings** tab. Then, click **Scheduling > Dynamic Gantt**.
2. Under **Group Nearby Appointments**, configure the following settings.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Appointment candidate Boolean field</td>
<td>Select any standard or custom checkbox field, including formula fields. This field must be selected (set to True) for an appointment to be a candidate in appointment grouping.</td>
</tr>
<tr>
<td>Work Order candidate Boolean field</td>
<td>Select any standard or custom checkbox field, including formula fields. If a service appointment’s parent record is a work order, this field must be selected (set to True) for the appointment to be a candidate in appointment grouping.</td>
</tr>
<tr>
<td>Work Order Line Item candidate Boolean field</td>
<td>Select any standard or custom checkbox field, including formula fields. If a service appointment’s parent record is a work order line item, this field must be selected (set to True) for the appointment to be a candidate in appointment grouping.</td>
</tr>
<tr>
<td>Max appointments to schedule</td>
<td>When searching for nearby appointments, the scheduling engine ends its search after finding this many candidate appointments. The maximum is 50 appointments.</td>
</tr>
<tr>
<td>Max runtime (seconds)</td>
<td>The scheduling engine spends this many seconds searching for nearby service appointments. The maximum is 60 seconds. The search ends after either the max runtime or max appointments to schedule is reached.</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| When attempting to schedule the unscheduled service after the nearby services | - **Schedule to original resource only**: Assign rescheduled appointments only to the original assigned resource.
- **Schedule to all resources**: Consider all qualified service resources when rescheduling appointments. |
| When unable to arrange schedule                  | - **Leave on Gantt and set In-jeopardy**: If an appointment can’t be rescheduled without breaking work rules, leave the appointment in its original time slot with an In Jeopardy flag.
- **Unschedule the appointment(s)**: If an appointment can’t be rescheduled without breaking work rules, unschedule the appointment and remove it from the Gantt.
- **Reshuffle other assignments**: If an appointment can’t be rescheduled without breaking work rules, use the Reshuffle action. This action reschedules appointments to favor high-priority appointments. To learn more, see Reschedule Service Appointments. |
| Radius for nearby appointments                   | The radius around the originating service appointment, which determines the number of appointments affected by Group Nearby Appointments. The distance unit—kilometers or miles—is set on the Routing tab in the Scheduling section of Field Service Settings. |

After customizing your appointment grouping settings, right-click an appointment on the Gantt and select **Group Nearby**.

**Considerations**

- In order to run Group Nearby Appointments successfully, service appointments must have the same address as their parent work order.
- Group Nearby Appointments uses the parent work orders’ latitude and longitude values.
- In Group Nearby Appointments, only unscheduled service appointments can be candidates.
- Group Nearby Appointments only schedules appointments within the given day, which is the first day on the Gantt.
- By default, the Is Fill In Candidate field on service appointments, work orders, and work order line items is selected. This means that all service appointments are considered as candidates when grouping appointments.
- When a service appointment is scheduled by Group Nearby Appointments, the appointment’s Schedule Mode is set to **Automatic**.
Fill Schedule Gaps

To fill gaps in a service resource’s schedule, use the Fill-In Schedule feature. This feature creates a list of appointments for a mobile worker and finds the optimal schedule.

This is a Field Service managed package feature.

Customize Fill-In Schedule Settings

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab. Then, click Scheduling > Dynamic Gantt.
2. Under Fill-In Schedule, configure the following settings.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Appointment Candidate Boolean field</td>
<td>Select any standard or custom checkbox field, including formula fields. This field must be selected (set to True) for an appointment to be a candidate in fill-in scheduling.</td>
</tr>
<tr>
<td>Work Order Candidate Boolean field</td>
<td>Select any standard or custom checkbox field, including formula fields. If a service appointment’s parent record is a work order, this field must be selected (set to True) for the appointment to be a candidate in fill-in scheduling.</td>
</tr>
<tr>
<td>Work Order Line Item Candidate Boolean field</td>
<td>Select any standard or custom checkbox field, including formula fields. If a service appointment’s parent record is a work order line item, this field must be selected (set to True) for the appointment to be a candidate in fill-in scheduling.</td>
</tr>
</tbody>
</table>
| Order candidate appointments by            | • **Priority**: Sort candidates based on their priority field, which is set in Scheduling > General Logic. Distance is a secondary consideration.  
  • **Distance**: Sort candidates based on their proximity to the previous appointment, or if it’s the first appointment of the day, on their proximity to the mobile worker’s home base. After an appointment is scheduled, its location is used to calculate distance. Priority is a secondary consideration. |
| Max appointments to schedule                | When searching for nearby appointments, the scheduling engine ends its search after finding this many candidate appointments. The maximum is 50 appointments. |
The scheduling engine spends this many seconds searching for nearby service appointments. The maximum is 60 seconds. The search ends after either the max runtime or max appointments to schedule be reached.

Considerations

- Fill-In Schedule only schedules appointments for the given day, which is the first day shown on the Gantt.
- By default, the Is Fill In Candidate field on service appointments, work orders, and work order line items is selected. This means that all service appointments are considered as candidates when filling in a schedule.

You might want to limit which appointments are considered as candidates. For example, perhaps repair appointments require a phone booking before a mobile worker is sent to the site. To limit candidate appointments, try one of the following approaches.

- Using Process Builder or an Apex trigger, set the value of the Is Fill In Candidate field to False if specified criteria aren’t met.
- Create a checkbox formula field that evaluates whether a record is a candidate. Then, change the three settings that control which fields are evaluated when searching for candidates so that your custom field is considered instead of Is Fill In Candidate.

- If candidate appointments are sorted by distance, appointments without a geolocation are sorted last.
- Only unscheduled appointments or appointments that are scheduled on a future date are considered as candidates.
- When a service appointment is scheduled by Fill-In Schedule, the appointment’s Schedule Mode is set to Automatic.

Customize Service Appointment Chatter Settings

Control whether custom Gantt Chatter posts, dispatch posts, and emergency posts are shared on service appointments or on service appointment parent records.

This is a Field Service managed package feature.

The Field Service mobile app’s Feed tab is supported for work orders and work order line items, but not for service appointments. This means that app users can’t see posts on a service appointment’s feed unless they know to navigate to the appointment from its associated work order. Posting Chatter posts to the parent record’s feed boosts their visibility for mobile app users.

Customize Dispatch Chatter Settings

When an appointment’s status category changes to Dispatched, the assigned resource is notified in a Chatter post. Control where these messages are posted.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Click Dispatch > Scheduled Jobs.
3. In the Dispatch Chatter Post Destination field, select Service Appointment Feed (the default option) or Parent Record Feed.
4. Save your changes.
Customize Emergency Chatter Settings

When a service resource is assigned to an emergency service appointment, they're notified in a Chatter post. Control where these messages are posted.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Click Global Actions > Emergency Wizard.
3. In the Emergency Chatter Post Destination field, select Service Appointment Feed (the default option) or Parent Record Feed.
4. Save your changes.

Customize Gantt Chatter Settings

A dispatcher can write a Chatter message for a service appointment from the Gantt by selecting Chatter > Custom message in the appointment's action menu. Control where these messages are posted.

Note: To access Chatter from the Gantt, feed tracking must be enabled for the Service Appointment object. See Customize Chatter Feed Tracking.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Click Dispatcher Console UI.
3. In the Gantt Chatter Post Destination field, select Service Appointment Feed (the default option) or Parent Record Feed.
4. Save your changes.

Tip: To turn on in-app notifications for mobile app and Lightning Experience users, see Enable Field Service.

Dispatch Service Appointments

Dispatch scheduled service appointments to your mobile workers. You can dispatch appointments from the console, or set up jobs that automatically dispatch or drip feed the next appointments.

IN THIS SECTION:

Auto-Dispatch Service Resources
Set up scheduled jobs that dispatch your resources auto-magically.

Drip Feed Service Appointments
Dispatch appointments to your mobile workers at a steady pace. When your schedule changes frequently, drip feed helps to prevent confusion because it waits to dispatch another appointment until the current one is complete.
Auto-Dispatch Service Resources

Set up scheduled jobs that dispatch your resources auto-magically.

**User Permissions**

To set up a job for dispatching: One of these custom permission sets:
- FSL Admin Permissions
- FSL Dispatcher Permissions

**Editions**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

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1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.

2. Click Dispatch.

3. Optionally, click Drip Feed and set up drip feed dispatching. Drip feed waits and dispatches another appointment after the current appointment is complete.

4. Click Scheduled Jobs.
   a. Select the option to mention assigned resources when they’re dispatched for an appointment.
   b. Select the Chatter feed where the mention should appear.
   c. Edit the provided Auto Dispatch job, or create a new one.
   d. Select territories that the job should use in dispatching service resources to appointments. The job dispatches resources based on service territory memberships, not territories of service appointments. A job considers primary and relocation service territory memberships.
   e. Create a schedule when the job runs.
   f. Set filter criteria that selects which service appointments to consider.
   g. Set a job horizon; that is, the number of days in advance to dispatch.
   h. Enter a username that’s notified when the job runs. Field Service replaces this username with the corresponding user’s email.
   i. Click Save.

5. Optionally, select the job and click Run now.
   When the job runs, it changes the status of the dispatched appointments from Scheduled to Dispatched. If you customize statuses for the service appointment lifecycle, the job changes status from the Service Appointment is tentatively scheduled setting to the status for the Service appointment is sent to its resource setting.

**Example:** Create a job that runs daily at 6AM and dispatches resources in Los Angeles for appointments that are In Jeopardy. The job dispatches resources with a primary or relocation service territory membership of Los Angeles for the selected In Jeopardy appointments.
Drip Feed Service Appointments

Dispatch appointments to your mobile workers at a steady pace. When your schedule changes frequently, drip feed helps to prevent confusion because it waits to dispatch another appointment until the current one is complete.

This is a Field Service managed package feature.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Click Dispatch.
3. Click Drip Feed and turn on drip feed dispatching.
4. Set the default number of appointments to drip feed.

Tip: When you want a service territory to use a different drip feed rate, set the value in a field on that territory. A drip feed setting on a service territory overrides the default value.

For example, if the value is set to two, drip feed tries to maintain two appointments in each worker’s queue. When the first appointment completes, drip feed dispatches another. Drip feed is triggered to dispatch another appointment only if a Dispatched or In-Progress appointment in the queue is Canceled, Completed, or Cannot Complete.

5. Click Scheduled Jobs, and create a job that dispatches appointments using your drip feed settings.

All scheduled jobs respect drip feed settings and don’t dispatch more appointments if doing so exceeds the drip feed value. If you disable drip feed, edit scheduled jobs so that dispatching works the way you want.

Manage Your Field Service Inventory

Stay on top of the movement of inventory in your field service operation. Learn how to request and transfer products, track consumption, and process customer returns.

In this section:

Common Inventory Management Tasks
Learn how to perform everyday tasks in field service inventory management.

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

Request Inventory
When your stock gets low or you need a part for a particular work order, create a product request.

Product requests can be associated with work orders, work order line items, cases, and accounts. You can specify when and where the parts are needed, and divide the request into line items that each represent a needed part.

Transfer Inventory
To fulfill a product request, create a product transfer. Product transfers track the movement of inventory from one field service location to another. The inventory numbers at your storage locations update automatically to reflect transfers.
**Track Inventory Consumption**
Create *products consumed* to track the use or consumption of items from your inventory.

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

**Track Customer Returns**
Create *return orders* to facilitate the return and repair of items that were sold to customers or supplied to field service workers.

## Common Inventory Management Tasks

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

For more detailed step-by-step instructions, refer to the provided links.

<table>
<thead>
<tr>
<th>I Want To…</th>
<th>How To Do It</th>
<th>Example</th>
</tr>
</thead>
</table>
| Track the quantity of a particular product stored at a particular location | Create a product item record associated with the product and the location, and specify the quantity stored there. Helpful links:  
  • Create Product Items to Represent Inventory | To track the number of wheelbarrows stored at Warehouse B, create a product item whose Location is Warehouse B and Product is Wheelbarrow. |
| Find out what’s in a particular location’s inventory | Look at the Product Items related list on the location record. Helpful links:  
  • Create Inventory Locations for Field Service | To find out what is stored in Warehouse A, look at the Product Items related list on the Warehouse A location record. |
| Find out the quantity of a particular part across all inventory locations | Look at the Product Items related list on the product record. Helpful links:  
  • Create Product Items to Represent Inventory | To learn the number of wheelbarrows in your inventory and their locations, look at the Product Items related list on the Wheelbarrow product record. |
| Review changes to the stock of a particular product at a particular location | Look at the Product Item Transactions related list on the product item. Helpful links:  
  • Guidelines for Transferring Inventory | To review the use, transfer, and restock of extra-large bolts at Warehouse C, look at the Product Item Transactions related list on the product item whose Product is Extra-Large Bolt and Location is Warehouse C. |

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</tr>
</thead>
<tbody>
<tr>
<td>Specify that a certain part is needed to complete a work order</td>
<td>Create a record in the Products Required related list on the work order.</td>
<td>To let the assigned technicians know that they need a forklift to complete work order #00046982, create a product required for the Forklift product on the work order.</td>
</tr>
<tr>
<td></td>
<td>Helpful links:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Track Required Inventory</td>
<td></td>
</tr>
<tr>
<td>Request more parts from another inventory location when my stock gets low</td>
<td>Create a product request to indicate what’s needed. Create a product request line item for each product requested.</td>
<td>To request a restocking of 20 boxes of nails and 10 hammers for your service vehicle, Van A, create a product request for the Van A location. Include one product request line item for the nails, and another for the hammers.</td>
</tr>
<tr>
<td></td>
<td>Helpful links:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Request Inventory</td>
<td></td>
</tr>
<tr>
<td>Transfer parts between inventory locations</td>
<td>1. Create a product transfer. Make sure to specify the quantity, source location, destination location, and source product item (which represents the stock that the items are being transferred from).</td>
<td>To transfer 25 tires from Warehouse A to Warehouse B, create a product transfer with these settings:</td>
</tr>
<tr>
<td></td>
<td>2. Create a shipment to track the transfer’s shipping details.</td>
<td>• Source Location: Warehouse A</td>
</tr>
<tr>
<td></td>
<td>3. Mark the product transfer received when the items arrive.</td>
<td>• Source Product Item: Warehouse A Tires</td>
</tr>
<tr>
<td></td>
<td>Helpful links:</td>
<td>• Destination Location: Warehouse B</td>
</tr>
<tr>
<td></td>
<td>• Transfer Inventory</td>
<td>• Quantity: 25</td>
</tr>
<tr>
<td></td>
<td>• Guidelines for Transferring Inventory</td>
<td>• Quantity Unit of Measure: Each</td>
</tr>
<tr>
<td>Transfer parts from an outside vendor to an inventory location</td>
<td>1. Create a product request, listing the outside vendor as the account.</td>
<td>Create a shipment to track the shipping details for the tire transfer. Select <strong>Received</strong> on the product transfer when the tires arrive at Warehouse B.</td>
</tr>
<tr>
<td></td>
<td>2. Create a product transfer. Make sure to specify the quantity, destination location, and product.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Create a shipment to track the transfer’s shipping details.</td>
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<td>4. Mark the product transfer received when the items arrive.</td>
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<tr>
<td></td>
<td>Helpful links:</td>
<td></td>
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<tr>
<td></td>
<td>• Request Inventory</td>
<td></td>
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<tr>
<td></td>
<td>• Transfer Inventory</td>
<td>• Guidelines for Transferring Inventory</td>
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<tr>
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<td>• Guidelines for Transferring Inventory</td>
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</tr>
<tr>
<td></td>
<td>To transfer 20 safety glasses from your safety equipment provider to Service Van A, create a product request that lists your outside vendor as the Account. Then, create a product transfer with these settings:</td>
<td>To transfer 20 safety glasses from your safety equipment provider to Service Van A, create a product request that lists your outside vendor as the Account. Then, create a product transfer with these settings:</td>
</tr>
<tr>
<td></td>
<td>• Product: Safety Glasses</td>
<td>• Product: Safety Glasses</td>
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<tr>
<td></td>
<td>• Destination Location: Service Van A</td>
<td>• Destination Location: Service Van A</td>
</tr>
<tr>
<td></td>
<td>• Quantity: 20</td>
<td>• Quantity: 20</td>
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<td></td>
<td>• Quantity Unit of Measure: Each</td>
<td>• Quantity Unit of Measure: Each</td>
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<tr>
<td></td>
<td>Because the items are coming from outside of your inventory, leave the Source Location and Source Product Item blank. Create a shipment to track the shipping details for the glasses transfer.</td>
<td>Because the items are coming from outside of your inventory, leave the Source Location and Source Product Item blank. Create a shipment to track the shipping details for the glasses transfer.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select <strong>Received</strong> on the product transfer when the glasses arrive at Service Van A.</td>
</tr>
</tbody>
</table>
## I Want To...

<table>
<thead>
<tr>
<th>Task</th>
<th>How To Do It</th>
<th>Example</th>
</tr>
</thead>
</table>
| Indicate that parts from your inventory were consumed while completing a work order | Create a product consumed record on the related work order.  
Helpful links:  
- Track Inventory Consumption  
- Guidelines for Consuming Inventory | You used 15 bolts from your service van, Service Van A, to complete work order #00046982. To track the consumption, create a product consumed record on the work order with these settings:  
- Product Item: Service Van A Bolts  
- Quantity Consumed: 15  
The product item quantity is automatically reduced by 15 to reflect that the bolts are no longer in stock. |
| Track the return of a customer product | Create a return order that lists the related case, order, or product.  
Helpful links:  
- Track Customer Returns  
- Guidelines for Tracking Customer Returns | A customer creates a case from the customer site to return a glass door. To track the return, create a return order which lists the related Order. Add a return order line item that lists the corresponding Order Product for the glass door.  
Create a product transfer to track the return of the product to the warehouse. Upon its arrival, increase the quantity on the glass door product item by 1. |
| Track the repair of a customer product | 1. Create a work order to repair the product.  
2. Create a return order that tracks the return of the product to the repair workshop.  
3. When the product is repaired, create a product transfer to track the return of the product back to the customer.  
Helpful links:  
- Track Customer Returns  
- Guidelines for Tracking Customer Returns | A customer calls your company to request a repair of their front gate. Create a work order, and then create an associated return order that tracks the return of the gate to the workshop.  
After the gate is repaired, mark the work order complete. Create a product transfer to track the return of the gate from the workshop to the customer. |
| Track the return of unused inventory from my stock back to the warehouse | Create a return order that lists the unused inventory in the Product or Product Item field.  
Helpful links:  
- Track Customer Returns  
- Guidelines for Tracking Customer Returns | To prepare for an on-site installation appointment, create a product request for three motors. Upon arriving at the site, you learn that only two motors are needed. To return the unwanted motor to the main warehouse, create a return order with one line item that lists the motor in the Product field.  
After the motor is returned to the warehouse, increase the quantity of the motor product item by 1. |
Track Required Inventory

If a work order needs to be completed by a carpenter with a hand saw, don’t assign it to an electrician with a voltmeter! Add products required 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.

Here’s how to add a required product to a work order, work order line item, or work type.

1. Navigate to the record that needs required products.
2. In the Products Required related list, click New.
3. Use the lookup field to select a product.
4. Enter the quantity required.
5. Select a quantity unit of measure.
6. Click Save.

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.

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1. Navigate to the record that needs required products.
2. In the Products Required related list, click New.
3. Use the lookup field to select a product.
4. Enter the quantity required.
5. Select a quantity unit of measure.
6. Click Save.
Request Inventory

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

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

1. From the Product Requests tab or the Product Requests related list on a work order or work order line item, click New.
2. If the request is being made for a particular job, select the related work order or work order line item.
3. Optionally, select the related account or case.
4. Enter the destination location, which is where the parts are needed.
   
   Tip: Service vehicles can also be locations. Mobile locations like vehicles have Mobile Location selected on their detail page.
5. Enter the address where the parts should be shipped; for example, the mailing address of the warehouse that is requesting them.
6. Select a shipment speed, and enter the Need By Date.
7. If the parts are being transferred from another location such as a warehouse, enter the source location.
8. Add a description.
9. Assign the product request a status:
   - Draft: Finalizing the product request details.
   - Submitted: The product request is ready for processing.
   - Received: The department in charge of fulfilling the request is working on it.
10. Save your changes.
11. Create one product request line item for each product needed.
    a. From the Product Request Line Items related list, click New.
    b. Select the product that is needed, and enter a quantity and unit of measure. These values are inherited from the Quantity Unit of Measure field on products.
    c. Fill in the rest of the fields as needed. The parent product request’s shipping and related record information is auto-populated on its line items.
    d. Save your changes.

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

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

**Note:** To allow the creation of product transfers for serialized product items (a beta functionality), contact Salesforce.

Create one product transfer for each product request line item so that you can track the status of each part. The Product Transfers related list on a product request shows all product transfers associated with the request’s line items. Product request line items have their own Product Transfers related list.

Typically, you create product transfers in response to a product request. You also can create a series of product transfers to track the initial stocking of a new mobile worker’s service vehicle.

1. From the Product Transfers tab or the Product Transfers related list on a product request, product request line item, product item, location, or shipment, click New.
2. Enter a source product item or product.
   - If you’re transferring the parts from a location within your inventory such as a warehouse, enter a source product item. The source product item shows where the parts are being transferred from and updates the quantity at the source location. For example, to transfer five hammers from Warehouse A to Warehouse B, select the product item record that tracks the hammers stored at Warehouse A.
   - If you’re transferring products from outside your inventory, such as from a manufacturer, enter a product name.
3. Enter the quantity to transfer and the Quantity Unit of Measure. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
4. If it’s not already populated, enter the related product request line item.
   - Tip: Set the status of the related product request line item to Received to indicate that the request is being processed.
5. Use the lookup field to select the shipment that includes the product items’ transfer.
6. Enter the destination, and if applicable, the source location.
7. Enter the expected pickup date.
8. Add a description.
9. After the transferred parts are received, select Received and update these fields:
   - Received By
   - Quantity Received
   - Status
   - After you mark a product transfer received, you can’t undo it.
10. Save your changes.

When a product transfer is marked received, several records are updated or created to keep your inventory numbers accurate. To learn more, see Guidelines for Transferring Inventory.
IN THIS SECTION:

**Guidelines for Transferring Inventory**

Product transfers track inventory movement between locations in field service. Learn how manage inventories with product transfers, and how product transfers interact with other inventory management records.

**Associate Product Transfers with Product Requests**

Typically, you create product transfers in response to a product request. You also can create a series of product transfers to track the initial stocking of a new mobile worker’s service vehicle.

If a product transfer is fulfilling a product request, create one product transfer for each product request line item so that you can track the status of each part. The Product Transfers related list shows all product transfers associated with the request’s line items. And, product request line items have their own Product Transfers related list.

**Associate Product Transfers with Shipments**

To monitor inventory movement, create shipments and link them to product transfers. Shipments contain information about the products on board, the shipping carrier, and the expected delivery date.

For example, you create a product request for 50 hammers and 40 boxes of nails at Warehouse C. The product request has two line items: one for hammers, and one for nails. To fulfill the request, your inventory manager creates two product transfers—one for each line item—that indicate that the hammers and nails are to be transferred from Warehouse B. The manager creates a shipment to track the transfer and then enters it in the Shipment field on both product transfers. The product request shows the related product transfers.

You can associate a shipment with multiple product transfers in the Product Transfers related list. A shipment’s product transfers can each be related to different product request line items from one or more product requests.

**Update or Delete Product Transfers**

If a product transfer isn’t marked received, you can edit it normally. You can’t update received transfers, but you can delete them. When you delete a transfer:

- The Quantity on Hand of the source and destination product items reverts to the pretransfer quantity.
- Product item transactions with a transaction type of Adjusted are added to the source and destination product items.

**Transfer Serialized Inventory**

For higher-value inventory such as computers, you can create one product item record per item so that you can record each item’s serial number on the product item record and then track the item’s movement.

Product transfers for serialized product items is in beta and is permitted only if you enroll in the beta program. When a product transfer for a serialized product item is marked received, the product item’s location automatically updates to reflect the transfer. This functionality has these limitations:

- The Location field on serialized product items can’t be updated manually.
• When a product transfer associated with a serialized product item is marked received, no product item transaction is created.
• Partial transfers of serialized product items aren’t permitted. A product transfer whose source product item is serialized can be marked received only if the product transfer’s Quantity Sent and Quantity Received are equal to the product item’s Quantity On Hand.

Mark Product Transfers Received

Selecting Received on a product transfer indicates that the items were added to the inventory at their destination. Marking a product transfer prompts these actions.

• **Product items are updated or created.** Product items track the quantity of a particular product at a particular location. For example, a product item can represent all the hammers at Warehouse A. When a product is transferred from one location to another, the quantity at the source location decreases to reflect the transfer.
  – If there’s a product item for the transferred products that are stored at the destination, the quantity increases to reflect the transfer.
  – The first time that a product is stored at the location, a product item is automatically created that reflects the quantity transferred there.

For example, if Service Van B never contained hammers, there’s no hammer product item record at Service Van B. When hammers are transferred to Service Van B, a product item is created that shows the number of hammers transferred.

• **Product item transactions are created.** When you mark a transfer received, a product item transaction with a type of Transferred is created to represent the increase in stock at the destination. If a source location or source product item is specified, a second transaction is created to represent the decrease of stock at the source. The first transaction’s quantity is positive because stock is added; the second transaction’s quantity is negative. These transactions appear in the Product Item Transactions related list on the related product transfer, source product item, and destination product item so that you can quickly review past transactions at your inventory locations.

**Example:** Warehouse A has 100 hammers in stock. Your new mobile worker, Jessica, has her service van, and you created a location to represent the van in Salesforce. You create a product transfer to track the transfer of five hammers from Warehouse A to Jessica’s van. Because Jessica’s van contains no hammers, selecting Received on the transfer causes these events.

• The quantity on the existing product item for hammers stored at Warehouse A decreases from 100 to 95
• A second product item is created that has these settings:
  – Product: Hammer
  – Quantity: 5
  – Location: Jessica’s Van
• A product item transaction is created for the hammer product item with a transaction type of Transferred and a quantity of 5.
Track Inventory Consumption

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

When an item leaves your inventory because it was used during a field service appointment, create a product consumed record so your inventory numbers are adjusted accordingly. You can add products consumed to work orders or work order line items. Track product consumption at the line item level if you want to know which products were used for each line item’s tasks.

1. In the Products Consumed related list on a work order or work order line item, click New.
2. If applicable, enter a work order line item. The work order is auto-populated.
3. In the Product Item field, select the product item where the part originated. For example, if 10 bolts that were stored in Warehouse B were used to complete the work order, select the product item that represents all bolts stored in Warehouse B.
4. Enter the quantity consumed.
5. To link the consumed product to a price book entry, select a price book entry and enter the unit price.
   
   **Note:** To create a product consumed that lists a price book entry, you need “Use” sharing access to price books.

6. Add context in the Description field.
7. Save your changes.

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

IN THIS SECTION:

**Guidelines for Consuming Inventory**

When inventory is consumed as part of a work order, logging the consumption kicks off several behind-the-scenes changes. Learn how product consumption fits into your field service operation.

**Track Product Consumption**

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

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

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

Note: If you want to track product consumption but don’t need to track the movement of inventory between locations, you can skip creating locations and product items. Instead, complete the Price Book Entry field on product consumed records to indicate which product was consumed. However, this approach offers a limited view of your inventory.

Viewing Updates to Product Consumed Records

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

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

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

- **Deleting a product consumed:** Deleting a product consumed is considered an adjustment. A product item transaction of type Adjusted is created with a positive quantity equal to the quantity consumed.

Track Inventory Shipments

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

Link shipments to product transfers so your team always knows the status of part transfers. While shipments are an optional feature, they help you stay informed about the coming and going of items in your inventory.

1. From the Shipments tab, click New.
2. In the General Information section, add details about the shipment’s origin and destination. If applicable, select the field service locations where the shipment departs or arrives.
3. In the Tracking Information section, add details about the shipping provider and delivery date.
4. Add a description explaining what is being shipped.
5. Save your changes.
6. From the Product Transfers related list, create product transfers to track the movement of product items that were included in the shipment.
Track Customer Returns

Create return orders to facilitate the return and repair of items that were sold to customers or supplied to field service workers.

1. From the Return Orders tab or the Return Orders related list on a record, click New.
2. Enter an account and contact associated with the return order.
3. Enter an associated product request. For example, if a mobile worker is returning an unused item, select the related product request that the product was intended to fulfill.
4. In the Returned By field, select the user returning the items.
5. Enter a source and destination location, if applicable. For example, if the return order tracks the return of products from a customer’s facility to your main warehouse, select the warehouse as your destination location.
6. Enter a shipment type, address, and the date the returned products are expected to arrive at the destination location. The Ship From Address represents the location of the items at the start of the return or repair. For example, if a customer is returning an item, enter the customer’s address.
7. Add notes or context about the return in the Description field.
8. Save your changes.
9. In the Return Order Line Items related list, add a line item for each product being returned.
   a. Click New.
   b. To represent the items being returned, fill out one of more of the following fields: Asset, Order Product, Product, Product Item, and Product Request Line Item.
      Tip: If you enter a product item, select the product item associated with the source location of the returned items.
   c. Enter a quantity and unit of measure. If a product or product item is selected, the unit of measure is autopopulated.
   d. Select a reason for the return.
   e. In the Processing Plan field, indicate what should happen to the returned item.
   f. In the Repayment Method field, indicate how the owner should be reimbursed for the return. If the return order is tracking the return of items from van stock to an inventory location, you’ll probably leave this field blank.
   g. If needed, update the source and destination location. These are inherited from the return order, but can be updated.
   h. Add notes or context about the returned items in the Description field.
   i. Save your changes.

IN THIS SECTION:
Guidelines for Tracking Customer Returns

You can use return orders to track customer returns, customer repairs, or the return of inventory from a mobile worker’s van stock to a warehouse or supplier. Learn about common return scenarios and how to log them in Salesforce.
Guidelines for Tracking Customer Returns

You can use return orders to track customer returns, customer repairs, or the return of inventory from a mobile worker's van stock to a warehouse or supplier. Learn about common return scenarios and how to log them in Salesforce.

Return orders are available in Lightning Experience, Salesforce Classic, the Salesforce mobile app, the Field Service mobile app for Android and iOS, and Experience Cloud sites built using Salesforce Tabs + Visualforce. Customers can initiate a return from a site, or agents can create return orders in response to a customer call or mobile worker request.

Create Return Orders

Create return orders from the Return Orders tab or the Return Orders related list on accounts, contacts, product requests, cases, orders, or locations.

You can associate return orders with product requests, cases, accounts, contacts, orders, work orders, and more. This versatility lets you use return orders to track a wide range of return scenarios. It’s up to you to decide how return orders fit into your field service processes. For example, to minimize processing time, don’t associate return orders with product transfers.

When you create a return order, add return order line items to track the specific items being returned or repaired. Each line item must list one or more of the following: product, product item, asset, product request line item, and order product. If you select more than one of these fields on a return order line item, make sure they all link to the same product.

Common Return Order Scenarios

Customer Returns

When a customer wants to return a product, create a return order. Follow these guidelines.

- On the return order:
  - If a customer case was created to address the return, select it in the Case field.
  - In the Source Location field, select the customer's site where the product is located at the start of the return. You may need to leave this field blank if the customer's site isn’t tracked as a location in Salesforce.
  - In the Destination Location field, select the inventory location where the item is returned for restocking, or the workshop where the item is salvaged or discarded.
  - In the Ship From address, enter the customer’s address where the product is at the start of the return.

- On the return order line item:
  - To represent the items being returned, fill out one or more of the following fields: product, product item, asset, product request line item, and order product. For customer returns, you’ll likely use the Asset or Order Product fields.

For example, a customer of a hypothetical robotic arms company, Rockin' Robotics, purchased a small hydraulic arm by mistake. To return it, they create a case from the customer site. The assigned agent creates a return order for the customer which lists the related order and order product. The agent then creates a product transfer to track the return of the arm to the warehouse. Upon its arrival, the on-site worker updates the quantity on the appropriate product item to indicate that the warehouse has gained a small hydraulic arm.

Customer Repairs

When a customer wants their product repaired or retrofitted, use a return order to track the repair and return of the product. Follow these guidelines.

- On the return order:
– Link the return order to related work orders in the Work Orders or Work Order Line Items related lists. Most repairs involve a work order that was created for the customer.
– If a customer case was created to address the repair, select it in the Case field
– In the Source Location field, select the customer’s site where the product is at the start of the return. You may leave this field blank if the customer’s site isn’t tracked as a location in Salesforce.
– In the Ship From address, enter the customer’s address where the product is at the start of the return.
– In the Destination Location field, select the workshop where the product is repaired. You can use product transfers to track the movement of the product to and from the workshop.

• On the return order line items:
  – In the Repayment Method field, if the item will be returned to the customer after repair, select Return.
  – To represent the items being repaired, fill out one or more of the following fields: product, product item, product request line item, and order product. For customer repairs, you’ll likely use the Asset or Order Product fields.

For example, a Rockin’ Robotics customer wants their eight-year-old hydraulic arm retrofitted to use the most current technology. They call Rockin’ Robotics and the support agent creates a work order to have the arm retrofitted. The agent then associates the work order with a return order that tracks the return of the arm to the Rockin’ Robotics Workshop. After the arm is retrofitted, the work order is marked complete and a product transfer is created to track the return of the arm from the workshop to the satisfied customer.

**Mobile Worker Returns**

When a product is requested for a field service job but ends up going unused for any reason, use a return order to track the return of the product to the supplier or an inventory location. Follow these guidelines:

• On the return order
  – In the Product Request field, select the product request that the product was intended to fulfill. You can also associate the return order line items with the product request’s line items.
  – In the Account field, select the account that the product was intended for.
  – In the Source Location field, select the product’s location at the time of the creation of the return order. For example, a mobile worker’s service vehicle.
  – In the Destination Location field, select the product’s intended destination. For example, an inventory location such as a warehouse, or a supplier’s site.
  – In the Ship From address, enter the starting address of the return.

• On the return order line items
  – If the return order lists a product request, select the relevant product request line item in the Product Request Line Item field.
  – If the return doesn’t involve reimbursement (which is likely), set the Repayment Method to None.
  – In the Processing Plan field, select Restock if the item is returning to your inventory.
  – To represent the items being returned, fill out one or more of the following fields: product, product item, product request line item, and order product. For mobile worker returns, you’ll likely use the Product Request Line Item, Product, or Product Item fields. If you select a product item, choose the product item that is associated with the product’s source location.

• If needed, create an associated product transfer to track the transfer of the product from its current location back to your inventory.

For example, to prepare for an on-site installation appointment, a Rockin’ Robotics mobile worker creates a product request for three large hydraulic arms. Upon arriving at the site, the worker learns that only two arms are needed. To return the unwanted arm to the main warehouse, the worker creates a return order with one line item that lists the arm in the Product field. After the arm is returned to the warehouse, the warehouse product item can be updated to reflect the change in inventory numbers.
Manage Service Reports

Make your customers happy with service reports delivered to their in-boxes. Mobile workers and dispatchers can create reports for work orders, work order line items, or service appointments and email them directly to the customer. Use standard templates or create variations of your own.

Note: Service report PDFs don’t support right-to-left text layout. For more information, see Right-to-Left (RTL) Language Support.

IN THIS SECTION:

Create Service Report Templates
A service report summarizes a work order or service appointment in a PDF that your customers and team members can sign. To control what appears in your service reports, create service report templates.

Create Service Reports
Create service reports to give your customers summaries of the work that your field service team performed.

Create Service Report Templates

A service report summarizes a work order or service appointment in a PDF that your customers and team members can sign. To control what appears in your service reports, create service report templates.

Users generate a service report for a record by clicking Create Service Report on a record. A record’s service reports appear in the Service Report related list. If you choose not to specify a service report template on a work order, it uses the service report template listed on its work type. If the work type doesn’t list a template or no work type is specified, the work order uses the default service report template. The same is true for work order line items.

Important: To avoid errors when service reports are generated, don’t deactivate the default service report template.

There’s an issue with service report templates when they’re saved in IE: the header can overlap the body in reports generated from these templates. Use Chrome or Firefox to save service report templates instead.

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

   a. Navigate to the Setup page.
   
   • In Salesforce Classic, from Setup, enter Digital Signatures in the Quick Find box, then select Fields under Digital Signatures.
   • In Lightning Experience, go to Digital Signature in the Object Manager, then click Fields and Relationships.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

USER PERMISSIONS

To edit page layouts and picklist values:
• Customize Application

To create service report templates:
• Modify All Data, Customize Application, and View Setup and Configuration
1. Click **Signature Type**.

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

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

3. Create a service report template.
   a. From Setup, enter **Service Report** in the Quick Find box, then click **Service Report Templates** under Field Service.
   b. Click **New**, or click **Edit** next to a report template you’d like to adjust. You already have one active template named Standard.
   c. If you’re creating a template, select an existing template as its base and give it a name.
   d. In the Related Templates dropdown menu, at the top of the template editor, select a subtemplate.

   ![Service Report Template](image)

   Each template comes with four subtemplates, which enables service reports for multiple record types:
   - Service Appointment for Work Order
   - Service Appointment for Work Order Line Item
   - Work Order
   - Work Order Line Item

   The Related Templates field shows the subtemplate that you’re editing. We recommend customizing all four subtemplates so you’re confident that your service reports contain the right information.

   e. Drag fields, sections, and related lists onto your layout.
   f. Click **Save**.

   **Note:** When you preview the report template, it shows the System Administrator profile view. The data shown is simulated, except for images and rich text. If the person creating the service report doesn’t have Read permission on objects or fields in the service report template, those fields don’t appear on the report they create.

   g. (Recommended) Select another subtemplate in the Related Templates field, and customize its layout. Repeat until you’ve reviewed the layout of all four subtemplates.

   h. Click **Activate** next to the template name on the Service Report Templates home page.

**IN THIS SECTION:**

- **Guidelines for Creating Service Report Templates**
  Service report templates in field service determine the type and order of data in service reports. Learn how to customize your service report templates to suit your needs.

- **Guidelines for Using Signatures on Service Reports**
  Field service workers can capture signatures from customers and partners on service reports. On the service report template, you define the number and type of signatures allowed.
Guidelines for Creating Service Report Templates

Service report templates in field service determine the type and order of data in service reports. Learn how to customize your service report templates to suit your needs.

Adding Fields

Service reports can contain fields from multiple objects. To add a field, select the object in the top-left section of the editor, then locate and drag the field onto your layout.

Use the Section element to organize fields on your layout. Your template comes with several default sections, which you can modify, rename, or delete. Click the wrench icon in a section to change the number of columns, edit or hide the title, and more.

Adding Related Lists

To add a related list to your template, drag the List element onto the layout. Enter a title, select the object, and select fields to display in the related list.

Filter a Related List

To hide unwanted records from a related list on generated service reports, create a filter. For example, filter the Work Order Line Items related list on work order service reports so it only shows completed line items.

Related list filters on service report templates work just like regular list view filters. You can create up to five filters per related list.

1. From the service report template editor, check the Related Templates field to make sure that you’re editing the desired sub-template.
2. On the related list you want to filter, click the wrench icon and select the Filters tab.
3. To define the filter, select a checkbox or picklist field, and choose an operator.
4. To select one or more values click the lookup icon, or enter values manually, separated by commas. Only records that list a selected value in the filter field appear in service reports that use the template. (Deactivated picklist values don’t appear in the lookup, but you can enter them manually.)
5. Click OK and save your changes. The filter you created is reflected in service reports that use your template.

Note:
- The Status field on contract line items isn’t available for filtering.
- The Filters tab isn’t available in Internet Explorer 8.
- If the user generating the service report doesn’t have access to a field used to filter the related list, the filtering doesn’t occur.

Sort a Related List

To customize the order of records in a related list, sort the list by any number or date field. For example, order the records in the Work Order Line Items related list from earliest to latest completion date.

1. From the service report template editor, check the Related Templates field to make sure that you’re editing the desired sub-template.
2. On the related list you want to filter, click the wrench icon and select the Sorting tab.
3. Select a field to sort by, and choose ascending or descending order.
4. Click OK and save your changes. The sorting logic you added is reflected in service reports that use your template.
Adding Signatures

To let mobile workers collect signatures on a service report, drag the Signature element onto your layout. You can add up to 20 signature blocks to a sub-template. Every signature block needs a different signature type. To learn more about signatures, see Guidelines for Using Signatures on Service Reports.

Adding Other Design Elements

- To add your company logo to service reports, drag the Text/Image Field element onto the layout and upload your logo. A 220-pixel wide logo is optimal, wider images are cropped. If the uploaded logo is wider than 220 px, resize the image by dragging its sizing handles in the Text/Image Field element. Images can be added to the header, footer, and body of a service report template.
- To customize the footer and add page numbers, click the wrench icon in the footer section. For example, add the Work Order Number field.
- To add space between fields or sections in the template, use the Blank Space field. Each Blank Space field adds 5 pixels of vertical space to the report PDF.

Guidelines for Using Signatures on Service Reports

Field service workers can capture signatures from customers and partners on service reports. On the service report template, you define the number and type of signatures allowed.

Set Up Signature Types

The Signature Type field specifies the role of the person signing a service report. The type ensures that the right person signs your service reports.

For example, when your company performs preventive maintenance, you want both the customer and the mobile worker to sign the final service report. The signatures confirm that both parties agree on the work that was completed.

Your org comes with one signature type called Default. A service report template can contain only one signature per type. If you want to collect more than one signature on a service report, you can add more signature types. In Setup, edit the Signature Type picklist field on the Digital Signature object. Create at least one value for each role that can sign a service report. For example, Technician, Customer, Supervisor, and Supplier. If you expect multiple people in one role—for example, all mobile workers who are at the appointment—to sign a service report, create numbered types: Technician 1, Technician 2, and so forth.

Note: You can create up to 1,000 signature types. You can’t delete a signature type, but you can deactivate it. When a signature type is deactivated, it can’t be added to a new service report template. However, the signature type still appears in the service report templates that include it.

Add Signature Blocks to Service Report Templates

A signature block on a service report template contains one signature.

To add a signature block to a service report template, navigate to the Service Report Templates page in Setup. Open a service report template and drag the Signature element to the template layout. Modify the signature block’s settings as needed. The Type field is
required. Make sure to add the Signature field, which designates the signature space. You can change the title to reflect who is signing, or hide the title and field labels.

You can add up to 20 signature blocks to a service report template. Because each signature block must use a different signature type, you can’t drag extra signature blocks onto a template until you’ve created corresponding Signature Type values. Double-click a signature block’s title to view its settings.

Note: Signature blocks can’t use multiple columns.

Capture Signatures for Service Reports

Signatures are captured from the Field Service mobile app. A captured signature isn’t reused in a future version of the report. For example, a mobile worker generates a service report for an appointment, and the customer signs it. The mobile worker then updates the service notes to add a recommendation. When the mobile worker regenerates the service report, the customer’s signature doesn’t appear on the new report.

If you want to reuse signatures across all service report versions, contact Salesforce.

Note: Signature capture and signature reuse are provided strictly on an "As-Is" basis. Customers are solely responsible for ensuring that the use of signature capture and signature reuse complies with applicable laws.

Find Signed Service Reports

To easily find the service reports that contain signatures, add the Signed checkbox to the Service Reports related list on work orders, work order line items, or service appointments. If a service report contains one or more signatures, this checkbox is automatically selected.
Create Service Reports

Create service reports to give your customers summaries of the work that your field service team performed.

Note:

- You can generate service reports from work orders, work order line items, and service appointments.
- In the Field Service mobile app, you can generate service reports from service appointments only.
- You can’t generate service reports in the Salesforce1 mobile app.
- See Quote Template and PDF Limitations and Visualforce PDF Rendering Considerations and Limitation for information on the limitations that apply to service report PDFs.
- See Considerations for Adding Images to Quote Templates for information on limitations that apply to images added to service reports.

1. From a work order, work order line item, or service appointment, in the action dropdown menu click Create Service Report.

   Tip: If you don’t see this action, ask your Salesforce admin to add it to the page layout. Service reports can’t be created for service appointments whose parent record is an account, asset, lead, or opportunity.

2. Use the lookup to find the template that you want to use.

3. Click Create PDF.

   The service report preview appears.

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

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

   Note: After the service report is created, the signatures collected during the service event are deleted. Use the saved service report to provide a proof of signature.

Service reports are translated in the language selected in the Service Report Language field on the associated work order. If that field is blank, they use the default language of the person generating the report.

Note: If you don’t have Read permission on an object or field in the service report template, it doesn’t appear in the service report that you create.
Optimize Your Field Service Schedule

Use schedule optimization to formulate the optimal schedule for your team and customers. Schedule optimization helps you comply with service-level agreements and minimize travel time, overtime, costs, and no-shows.

This is a Field Service managed package feature.

IN THIS SECTION:

What’s Schedule Optimization?
Manually constructing an efficient field service schedule can drive even the most serene administrator to madness. Field Service’s optimization tool does the work for you by generating an optimal schedule according to your priorities and constraints.

Create and Manage Scheduling Policies
A scheduling policy is a set of rules and objectives that guides the schedule optimizer in its decisions. Use scheduling policies to promote or de-emphasize factors like business priorities, travel time, and customer preferences. Whenever you optimize your team’s schedule, you can select a guiding scheduling policy.

Create and Manage Work Rules
Work rules refine the list of candidates for a service appointment by rejecting service resources that violate any rule. Add work rules to any scheduling policy to guide schedule optimization.

Create and Manage Service Objectives
Add service objectives to a scheduling policy to indicate your scheduling goals. You can weight each objective to indicate its importance. During schedule optimization, each appointment assignment receives a score from 0 to 100 for every service objective based on how fully the objective was met.

Set Up and Run Optimization Jobs
Optimize your team’s schedule for one or more service territories across a specified range of days. You can configure the optimization to run regularly—for example, every night—or run it manually as needed.

Optimize Today’s Schedule
Navigate last-minute schedule upsets by rapidly optimizing your team’s schedule for one or more service territories on the day of service.

Optimize a Single Resource’s Schedule
When last-minute developments occur like canceled jobs, lateness, or emergencies, optimize an individual service resource’s schedule to design the best schedule for them.

Optimize Appointments Using Priorities
When your team’s availability is limited, prioritize critical service appointments over less pressing work. You can assign dynamic priorities, such as values that increase as due dates approach. Optimization can consider priority values when it assigns appointments to time slots.

Create Scheduling Recipes for Common Events
Tackle common scheduling challenges with simple optimization “recipes” that address what happens to your schedule after appointment cancellations, time changes, and overlaps. Cover all scenarios by creating multiple recipes for each category.

Monitor Optimization Requests
Keep an eye on all schedule optimization requests from the Gantt or the Optimization Requests custom tab.
Create Relevance Groups

A relevance group is a group of service appointments or service territory members that require their own work rules or service objectives. For example, use relevance groups to enforce your company policy on breaks and travel time for full-time versus part-time employees.

What’s Schedule Optimization?

Manually constructing an efficient field service schedule can drive even the most serene administrator to madness. Field Service’s optimization tool does the work for you by generating an optimal schedule according to your priorities and constraints.

This is a Field Service managed package feature.

Here’s an example of how schedule optimization can boost your efficiency.

<table>
<thead>
<tr>
<th>Before Optimization</th>
<th>After Optimization</th>
</tr>
</thead>
<tbody>
<tr>
<td>62 scheduled hours</td>
<td>69.5 scheduled hours</td>
</tr>
<tr>
<td>24 minutes average travel</td>
<td>15 minutes average travel</td>
</tr>
<tr>
<td>51 scheduled appointments</td>
<td>56 scheduled appointments</td>
</tr>
</tbody>
</table>

Optimization Options

Define the scope of optimization to include an entire service territory’s schedule or just a single resource’s schedule.

- **Global optimization**—Optimize your team’s schedule for one or more service territories across a specified range of days. You can configure this type of optimization to run regularly—for example, every evening. Or, you can run it manually as needed. Global optimization is the most thorough and powerful type of optimization, and therefore takes the most time to complete.

- **In-day optimization**: Navigate last-minute schedule upsets by rapidly optimizing your team’s schedule for one or more service territories on the day of service.

- **Resource optimization**—Optimize an individual service resource’s schedule on the day of service.

Terms to Know

Schedule optimization is based on several custom components that help you fine-tune your scheduling operations.

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling policy</td>
<td>A set of rules and objectives that guide the schedule optimizer. Use a scheduling policy to promote or de-emphasize factors such as business priorities, travel time, and customer preferences. When you optimize your team’s schedule, you can select a guiding scheduling policy.</td>
</tr>
<tr>
<td>Work rule</td>
<td>A rule that refines the list of candidates for a service appointment by rejecting service resources that don’t match the rule. For example, the Match Skill rule ensures that service appointments are assigned only to service resources with the required skills. A scheduling policy can have one or more work rules.</td>
</tr>
</tbody>
</table>
A scheduling goal or target. You can weight service objectives to prioritize one over another. Every appointment assignment has a score for each service objective. The score indicates how fully the objective was met. The highest-scoring assignments are preferred.

A scheduling policy can have one or more service objectives.

A subset of service resources or service appointments. Use relevance group to apply work rules or service objectives to certain resources—for example, full-time resources only—or service appointments. You can create modified versions of work rules and service objectives for each group and assign them to the group using Visualforce components.

For a given time horizon, optimization grades assignments based on service objectives, and compares overall scores for different schedule iterations. When the optimization is completed, it chooses the schedule with the highest score, and assigns appointments accordingly.

Optimization can move appointments that were previously scheduled. For example, optimization can reassign an appointment when it finds a slot with a better grade or when it tries to fix an overlap. If an optimization unschedules an appointment and can’t find another suitable slot, the appointment remains unscheduled after the optimization is completed.

**Note:** If Fix Overlaps is selected in the scheduling policy, any existing appointment overlaps are addressed during in-day or global optimization. When overlaps are being fixed, the overlapping appointments are unscheduled. If the optimization engine is unable to find a valid schedule for any appointments, these appointments remain unscheduled. If Fix Overlaps isn’t selected, overlaps are left as is. This is not to be confused with the Fix Overlaps feature in the dynamic Gantt, which is used to reschedule overlapping appointments. In the Fix Overlaps managed package feature, you can configure fix overlap settings. For example, when unable to find a valid schedule for an appointment, you can select to put the appointment in jeopardy, unschedule it, or reshuffle other assignments.

**Tip:** Not sure where to start? Create a scheduling recipe to address common scheduling challenges, like appointment cancellations or overlaps.

**Create and Manage Scheduling Policies**

A scheduling policy is a set of rules and objectives that guides the schedule optimizer in its decisions. Use scheduling policies to promote or de-emphasize factors like business priorities, travel time, and customer preferences. Whenever you optimize your team’s schedule, you can select a guiding scheduling policy.

这才是一个Field Service管理包功能。

调度策略由两个部分组成：

- **工作规则**定义一个服务预约的候选名单，并拒绝任何违反规则的服务资源。
- **服务目标**代表策略的目的。你可以权衡每个目标以表示其重要性。
Standard Scheduling Policies

Field Service includes four standard scheduling policies. You can customize these policies or create your own.

<table>
<thead>
<tr>
<th>Scheduling Policy</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer First</td>
<td>Balances great customer service with travel minimization. Appointments are graded first by the customer’s selection of a preferred employee and then by the ability to schedule the appointment as soon as possible. Travel minimization is the second priority.</td>
</tr>
<tr>
<td>High Intensity</td>
<td>Typically used in times of high service volumes, like a storm scenario, where you need employee productivity is higher priority than customer preferences.</td>
</tr>
<tr>
<td>Soft Boundaries</td>
<td>Identical to the Customer First policy, but allows the sharing of employees between territories to enhance service coverage.</td>
</tr>
<tr>
<td>Emergency</td>
<td>Used with the Emergency Chatter action to dispatch emergency service appointments.</td>
</tr>
</tbody>
</table>

Manage Scheduling Policies

Create and manage scheduling policies from Guided Setup or the Scheduling Policies tab. To open Guided Setup, from the App Launcher, find and open the Field Service Admin app. Click Field Service Settings > Go to Guided Setup > Customize Scheduling Policies. Check your page layout settings before you begin; some fields may need to be added to your layout.

Outside of Guided Setup, you can view a policy’s work rules and weighted service objectives in its related lists.

Note: Every scheduling policy automatically includes a Due Date work rule and Earliest Start Permitted work rule. In addition, scheduling policies must include a Service Resource Availability work rule for resource absences to be respected during scheduling.
Apply a Scheduling Policy

You can apply a scheduling policy to your scheduling process in several ways.

<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a policy for scheduled optimization jobs</td>
<td>From the App Launcher, find and open the <strong>Field Service Admin</strong> app, and then click the <strong>Field Service Settings</strong> tab. Then, click <strong>Optimization &gt; Scheduled Jobs</strong>. Update the Scheduling Policy field on any scheduled job to list your preferred policy.</td>
</tr>
<tr>
<td>Select a default scheduling policy for scheduling from the dispatcher console</td>
<td>From the App Launcher, find and open the <strong>Field Service Admin</strong> app, and then click the <strong>Field Service Settings</strong> tab. Click <strong>Dispatcher Console UI</strong> and update the Default scheduling policy field.</td>
</tr>
<tr>
<td>Select a default scheduling policy for the Book Appointment and Candidates actions</td>
<td>From the App Launcher, find and open the <strong>Field Service Admin</strong> app, and then click the <strong>Field Service Settings</strong> tab. Click <strong>Global Actions &gt; Appointment Booking</strong> and update the Default scheduling policy field.</td>
</tr>
<tr>
<td>Select a policy in the dispatcher console appointment list</td>
<td>The Policy field in the appointment list shows the default dispatcher console scheduling policy, but can be updated before a dispatcher optimizes the schedule.</td>
</tr>
</tbody>
</table>

**Note:** To automatically schedule a service appointment, select a scheduling policy using the Scheduling Policy Used field. Then select the checkbox for Auto Schedule. If the Scheduling Policy Used field is blank, Field Service uses your org’s default scheduling policy.

Scheduling Policy Fields

Scheduling policies have the following fields. Some may need to be added to your page layouts.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| Commit Mode              | Choose what happens if a user makes a potentially conflicting change to the schedule while optimization is in progress. This field applies to resource schedule optimization and in-day optimization, and isn’t considered in global optimization. The field has two options:
  * **Always Commit** (default)—If a user tries to make a potentially conflicting change to the schedule while optimization is in progress, warn the user that their change may conflict with the optimization results, but let them opt to complete the change. If the conflicting change is made by automation or a user outside of the dispatcher console, no warning is displayed.
  * **Rollback**—If a potentially conflicting change is made to the schedule for the dates being optimized—with a buffer day before and after—don’t complete the optimization. This choice is a conservative scheduling option that helps you avoid all possible conflicts. |
For example, if you begin a scheduled job to optimize April 2–5, any change made to the April 1–6 schedule causes the optimization to be rolled back. Changes include creating, updating, and deleting resource absences and service appointments.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Description of the policy.</td>
</tr>
</tbody>
</table>
| Fix Overlaps        | (Checkbox) If this option is selected, any existing appointment overlaps are addressed during in-day or global optimization. The way the overlap is addressed depends on:  
  • The start time and priority of the overlapping appointments.  
  • Whether either appointment has a pinned status. To choose which appointments are pinned (excluded from rescheduling) during optimization, from the Field Service Settings tab, click **Optimization > Logic**.  
  If **Fix Overlaps** isn’t selected, overlaps are left as is. |
| In-Day Optimization | (Checkbox) If this option is selected, the scheduling policy uses in-day optimization rather than global optimization. |
| Scheduling Policy Name | Name of the policy. |

**Create and Manage Work Rules**

Work rules refine the list of candidates for a service appointment by rejecting service resources that violate any rule. Add work rules to any scheduling policy to guide schedule optimization.

- **Note:** **Fix Overlaps** in global optimization and in-day optimization addresses only overlaps between service appointments and ignores overlaps with Resource Absences.

**Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.**

**Note:** If a user doesn’t see a particular work rule type, they may need profile-based access to it. Navigate to the user’s profile in Setup. Under Custom Record Type Settings, click **Edit** next to Work Rules and move the record type to Selected Record Types.

**IN THIS SECTION:**

**Work Rule Type: Count Rule**

Use a Count work rule type to restrict appointment scheduling based on assignments, hours worked, or a custom value. It’s a great way to prevent overloading your workers or their vehicles.
**Work Rule Type: Excluded Resources**

Sometimes, customers have a poor experience with a service resource and request not to work with them in the future. The Excluded Resources work rule type ensures that if a service resource is listed as an Excluded resource preference on an appointment’s work order, they won’t be assigned to it.

**Work Rule Type: Extended Match**

Use the Extended Match work rule type to schedule service appointments using custom criteria. It uses a junction, or linking, object to match a field on the Service Appointment object to a related list on the Service Resource object.

**Work Rule Type: Match Boolean**

The Match Boolean work rule type enforces scheduling preferences based on a checkbox (Boolean) field on service resources.

**Work Rule Type: Match Fields**

The Match Fields work rule type matches a field on service appointments with a field on service resources. It’s a great way to enforce requirements based on custom fields.

**Work Rule Type: Match Skills**

The Match Skills work rule type matches a service appointment’s parent record’s skill requirements with a service resource’s assigned skills. It can also be used to enforce skill level requirements.

**Work Rule Type: Match Territory**

The Match Territory work rule type ensures that a service appointment is assigned only to service resources who are Primary or Relocation members of the appointment’s service territory.

**Work Rule Type: Match Time Rule**

The Match Time Rule work rule type limits the scheduling time frame based on an appointment’s date and time properties. For example, the Due Date work rule ensures that the appointment’s scheduled end is before its due date.

**Work Rule Type: Maximum Travel from Home**

The Maximum Travel from Home work rule type lets you set the maximum distance or travel time between a service resource’s home base and any appointment assigned to the resource. It’s a useful way to minimize mobile workers’ travel time.

**Work Rule Type: Required Resources**

The Required Resources work rule type ensures that a service appointment’s parent record’s resource preferences of type Required are respected. If an account or work order lists a particular service resource as required, a Required Resources work rule ensures that the related service appointments are assigned to that resource.

**Work Rule Type: Service Appointment Visiting Hours**

The Service Appointment Visiting Hours work rule type enforces your customers’ operating hours. For example, if an account’s operating hours are weekdays between 8:00 AM and noon, appointments for that customer are scheduled only within those hours.

**Work Rule Type: Service Crew Resources Availability**

The Service Crew Resources Availability work rule type ensures that a service resource of type Crew is assigned to an appointment only if the crew complies with the appointment’s parent record’s minimum crew size.

**Work Rule Type: Service Resource Availability**

The Service Resource Availability work rule type ensures that a service resource is available to perform a service appointment. Every scheduling policy needs a work rule of this type, or resource absences aren’t respected during scheduling.

**Work Rule Type: TimeSlot Designated Work**

Often, field service businesses reserve parts of the day for specific types of work. The TimeSlot Designated Work work rule type ensures that if a time slot is reserved for a specific type of work, only appointments of that type are scheduled in the time slot.

**Work Rule Type: Working Territories**

Sometimes, service resources need to be available to take on work in more than one service territory. The Working Territories work rule type enforces primary and secondary service territory memberships.
Work Rule Type: Count Rule

Use a Count work rule type to restrict appointment scheduling based on assignments, hours worked, or a custom value. It’s a great way to prevent overloading your workers or their vehicles.

⚠️ This is a Field Service managed package feature.

A work rule of this type contains the following settings.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Resolution</td>
<td>Time span for the count. Currently, the resolution is daily.</td>
</tr>
<tr>
<td>Count Type</td>
<td>What the rule counts: assignments, durations, or a custom field value.</td>
</tr>
<tr>
<td>Count Object</td>
<td>Object used in the count. If the rule counts assignments or durations, the object is a service appointment. If the rule counts a custom value, select the object that has the custom field: service appointment, work order, or work order line item.</td>
</tr>
<tr>
<td>Custom Field</td>
<td>Custom field name.</td>
</tr>
<tr>
<td>Default Limit</td>
<td>Default count limit.</td>
</tr>
<tr>
<td>Resource Property</td>
<td>API name of a numeric custom field on a service resource. This field represents the limit on service resources. If this field is null, we use the default limit.</td>
</tr>
</tbody>
</table>

Create a count work rule from the Work Rules tab.

💡 Tip: To create work rules, you need the Field Service Admin custom permission set. If the Count work rule isn’t listed as a work rule type, update the Field Service custom permission sets.

Enter the fields manually, or use the Count Rule custom Lightning component helper.

Add the work rule to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or the Scheduling Policy Work Rule related list.

Scheduling and optimization consider resources for assignments as long as assignments don’t result in overstepping the limit.

When a manual schedule change causes a limit to be exceeded, the Gantt shows rule violations on all appointments that contribute to the count. Violations include rule names, so use meaningful names.

Considerations:

- In a policy, you can add up to four rules that count custom field values. You can also add more rules that count assignments and durations.
- If a resource has reached a count limit, scheduling actions still consider the resource’s availability for appointments in which the count rule doesn’t apply. For example, when an appliance installer has reached their vehicle’s item limit, scheduling can still consider them for other jobs such as maintenance.
- A count rule uses midnight as the Start of Day even if it’s customized to a different value.
• Multiday work and complex work aren’t supported with Count work rules.
• You can use Count rules with relevance groups that consist of service territory members, but not with relevance groups that are based on service appointments.
• You can set up count rules for crews. Count rules don’t apply to individual service resources while they’re part of a crew.
• Count work rules ignore capacity-based resources.

Example: A dispatcher wants to create schedules that respect how many solar panels workers can deliver and install. A custom field on work orders represents the panel quantity for each installation. Because workers drive different vehicles, a resource property indicates how many panels a worker can transport. To set limits for large versus small trucks, you can add workers to relevance groups based on truck size and create rules using those groups.

Work Rule Type: Excluded Resources

Sometimes, customers have a poor experience with a service resource and request not to work with them in the future. The Excluded Resources work rule type ensures that if a service resource is listed as an Excluded resource preference on an appointment’s work order, they won’t be assigned to it.

This is a Field Service managed package feature.

Use this work rule type to enforce customer resource preferences, such as those resulting from a complaint. Other work rules can exclude service resources based on skills, availability, and proximity.

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.

Work Rule Type: Extended Match

Use the Extended Match work rule type to schedule service appointments using custom criteria. It uses a junction, or linking, object to match a field on the Service Appointment object to a related list on the Service Resource object.

This is a Field Service managed package feature.

Because you can use an Extended Match work rule to match appointments to resources using your own customizations, writing a rule requires some prior setup. Before you get started, create a data model or make sure that you have an existing data model with the appropriate fields. We suggest using Schema Builder.

You can apply Extended Match work rules when scheduling appointments. To use them with optimization, set up optimization on page 70.

A work rule of this type contains the following settings.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Appointment Matching Field</td>
<td>The service appointment lookup field value that you’re matching. The field must be of the type Lookup.</td>
</tr>
<tr>
<td>Linking Object</td>
<td>The junction object used to link service resources to the object that the service appointment matching field references.</td>
</tr>
<tr>
<td>Linking Object Reference Field</td>
<td>The reference field on the linking object that is matched with the Service Appointment Matching Field.</td>
</tr>
</tbody>
</table>
### Field Service

#### Create and Manage Work Rules

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time-Phased</td>
<td>Indicates whether the work rule applies only to a certain time period.</td>
</tr>
<tr>
<td>Start Date Field Name</td>
<td>The Date-Time field name on the Linking Object that represents the start time. This field is required when you select Time-Phased.</td>
</tr>
<tr>
<td>End Date Field Name</td>
<td>The Date-Time field name on the Linking Object that represents the end time. This field is required when you select Time-Phased.</td>
</tr>
</tbody>
</table>

After you create the data model for your work rule, finish setting it up by creating a work rule from the Work Rules tab. Enter the fields manually, or use the Extended Match Rule custom Lightning Component helper.

You can add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy. A policy can have up to five Extended Match work rules. Applying more than two Extended Match work rules with complex scenarios, such as multiday or crew scheduling, can affect scheduling performance. The scheduling operation can fail if a Salesforce platform limit is reached.

**Example:** If your mobile workers support specific ZIP codes, use an Extended Match work rule to assign them appointments within their area. Create a ZIP Code lookup field on the Service Appointment object. Then create a ZIP Code Coverage linking object, add the ZIP Code field, and attach it to the Service Resource object as a related list. Use the Extended Match Rule Lightning Component to create a work rule.

The ZIP Code Coverage example has this data model.

![Data Model Diagram](image)

**Note:** In this example, if a service appointment has an empty ZIP Code field, the work rule returns all Service Resources. Define other work rules in your policy, such as Match Skills or Match Territory, that can narrow resources when there’s no ZIP code on the appointment.

**Considerations:**
- Time-phased Extended Match work rules can consume up to 80 records on a service resource during the selected time period. Work rules that aren’t time-phased can consume up to 200 records.
- You can’t use relevance groups with Extended Match work rules.
Work Rule Type: Match Boolean

The Match Boolean work rule type enforces scheduling preferences based on a checkbox (Boolean) field on service resources.

This is a Field Service managed package feature.

Work rules of this type contain two key settings.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Property</td>
<td>The API name of the checkbox field on service resources that defines the scheduling requirement. For example, IsActive.</td>
</tr>
<tr>
<td>Value is True</td>
<td>If selected, the Resource Property must be True (selected) for a service resource to be assigned to a service appointment. If not selected, the Resource Property must be false (deselected) for a resource to be assigned to an appointment.</td>
</tr>
</tbody>
</table>

To control which checkbox fields are available as resource properties:

- Add the API name of any checkbox field as a picklist value in the Resource Property field on the Work Rule custom object in Setup.
- Make sure that the value has been enabled for the record type.

Field Service includes a standard Match Boolean work rule named Active Resources. This work rule:

- Assures that only active service resources are considered for scheduling.
- Lets you preserve historical data on the Gantt. When a service resource leaves your company, their assignment data remains.

![Work Rule: Active Resources](image)

A scheduling policy can contain up to five Match Boolean work rules.

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.
**Work Rule Type: Match Fields**

The Match Fields work rule type matches a field on service appointments with a field on service resources. It’s a great way to enforce requirements based on custom fields.

⚠️ *This is a Field Service managed package feature.*

Work rules of this type contain three key settings.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Property</td>
<td>The API name of the field on service appointments that helps define the scheduling requirement. All primitive data types are supported.</td>
</tr>
<tr>
<td>Boolean Operator</td>
<td>The required relationship between the Service Property and the Resource Property. For example, if =, a service appointment’s Service Property value must equal a service resource’s Resource Property value for the resource to be assigned to the appointment.</td>
</tr>
<tr>
<td>Resource Property</td>
<td>The API name of the field on service resources that helps define the scheduling requirement. All primitive data types are supported.</td>
</tr>
</tbody>
</table>

To control which fields are available as resource and service properties:

- Add the API name of any field as a picklist value in the Resource Property or Service Property fields on the Work Rule custom object in Setup.
- Make sure that the value has been enabled for the record type.

⚠️ **Important:** Match Fields work rules aren’t supported for schedule optimization.

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.
**Work Rule Type: Match Skills**

The Match Skills work rule type matches a service appointment’s parent record’s skill requirements with a service resource’s assigned skills. It can also be used to enforce skill level requirements.

*This is a Field Service managed package feature.*

Work rules of this type have one key field.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Match Skill Level</td>
<td>If selected, service resources whose skill level is lower than the level listed on an appointment’s parent record’s Skill Requirement record aren’t considered as candidates.</td>
</tr>
</tbody>
</table>

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.

**Work Rule Type: Match Territory**

The Match Territory work rule type ensures that a service appointment is assigned only to service resources who are Primary or Relocation members of the appointment’s service territory.

*This is a Field Service managed package feature.*

This rule compares the Service Territory field value on service appointments with the Service Territory field value on service territory member records.

*Note:* A scheduling policy can’t include both a Working Territories work rule and a Match Territory work rule.

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.

**Work Rule Type: Match Time Rule**

The Match Time Rule work rule type limits the scheduling time frame based on an appointment’s date and time properties. For example, the Due Date work rule ensures that the appointment’s scheduled end is before its due date.

*This is a Field Service managed package feature.*

Work rules of this type contain the following settings.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Schedule Time Property</td>
<td>Indicates whether the rule controls the service appointment’s scheduled start time or scheduled end time. Custom date/time fields aren’t supported.</td>
</tr>
</tbody>
</table>
Field Service includes four standard Match Time Rule work rules.

- Earliest Start Permitted: Ensures that a service appointment’s Scheduled Start is equal to or later than the Earliest Start Permitted. This work rule is included in every standard scheduling policy.
- Due Date: Ensures a service appointment’s Scheduled End is equal to or earlier than the Due Date. This work rule is included in every standard scheduling policy.
- Scheduled Start: Ensures that a service appointment’s Scheduled Start is equal to or later than the Arrival Window Start.
- Scheduled End: Ensures that a service appointment’s Scheduled Start is equal to or earlier than the Arrival Window End.

An appointment’s Scheduled Start is based on the travel time recorded for previous appointments. The Scheduled End is calculated by adding the Duration to the Scheduled Start.

Work rules that impose time constraints limit your optimization flexibility. When you create Match Time Rule work rules, consider the commitments that you’ve made to customers and your goals regarding wait time.

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.
Work Rule Type: Maximum Travel from Home

The Maximum Travel from Home work rule type lets you set the maximum distance or travel time between a service resource’s home base and any appointment assigned to the resource. It’s a useful way to minimize mobile workers’ travel time.

*This is a Field Service managed package feature.*

**Important:** To calculate maximum travel time or distance, Field Service uses aerial routing (as the crow flies).

Work rules of this type are particularly useful if your service territories are functional rather than geographical.

Work rules of this type contain the following settings:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Travel From Home Type</td>
<td>Indicates whether the work rule enforces a maximum travel time or maximum distance.</td>
</tr>
<tr>
<td>Maximum Travel From Home</td>
<td>The maximum, which is measured in minutes for travel time and miles or kilometers for distance. The miles or kilometers preference is set in the Field Service Admin app.</td>
</tr>
<tr>
<td>Relevance Groups</td>
<td>Available only if relevance groups are implemented. Relevance groups let you apply the work rule to a subset of service resources. For example, use relevance groups to enforce these policies:</td>
</tr>
<tr>
<td></td>
<td>• Don’t assign resources to maintenance appointments that are more than 20 miles from their home base.</td>
</tr>
<tr>
<td></td>
<td>• Don’t assign highly qualified workers to appointments that are more than 20 miles from their home base.</td>
</tr>
</tbody>
</table>

If a service resource’s home base (address) isn’t specified, the resource isn’t a candidate for any service appointment. If a service appointment lacks geocoordinates (calculated from an address), it can be assigned to any service resource with a home base.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.
Work Rule Type: Required Resources

The Required Resources work rule type ensures that a service appointment’s parent record’s resource preferences of type Required are respected. If an account or work order lists a particular service resource as required, a Required Resources work rule ensures that the related service appointments are assigned to that resource.

This is a Field Service managed package feature.

Required Resources work rules are a useful way to preserve one-on-one customer-provider relationships, such as home healthcare. These work rules are highly restrictive, because they limit the pool of potential assigned resources to consider only those who are listed as required in the Resource Preferences related list on the related work order or account.

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.

Work Rule Type: Service Appointment Visiting Hours

The Service Appointment Visiting Hours work rule type enforces your customers’ operating hours. For example, if an account’s operating hours are weekdays between 8:00 AM and noon, appointments for that customer are scheduled only within those hours.

This is a Field Service managed package feature.

To define a customer’s preferred hours of service, create operating hours for them from the Operating Hours tab. Select the hours in the Operating Hours field on the account. Work orders created for the account use the account’s operating hours, and service appointments use their work order’s operating hours.

Operating hours use the time zone of the service appointment they’re attached to. The service appointment inherits its location’s time zone. If the location has no time zone specified, GMT is used.

Note: Dispatchers can still manually schedule appointments outside a customer’s operating hours, but they’re alerted that they’re doing so.

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.
Work Rule Type: Service Crew Resources Availability

The Service Crew Resources Availability work rule type ensures that a service resource of type Crew is assigned to an appointment only if the crew complies with the appointment’s parent record’s minimum crew size.

This is a Field Service managed package feature.

If the Minimum Crew Size field on work orders, work order line items, and work types is completed, this work rule type comes into play. You can configure the rule to compare this Minimum Crew Size with either of the following:

- Crew Size field on the service crew record
- Actual number of allocated service crew members at the time of assignment

For example, if a work order’s Minimum Crew size is 4 and a scheduling policy is applied with a work rule of this type, the appointment won’t be assigned to a crew with fewer than four members.

Note: For tips on scheduling service crews, see Considerations for Scheduling Service Crews.

Service Crew Resources Availability work rules have the following setting:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consider Service Crew Membership</td>
<td>Select this option if you want to check the actual number of service crew members, rather than the crew size listed on the service crew record.</td>
</tr>
</tbody>
</table>

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.

Work Rule Type: Service Resource Availability

The Service Resource Availability work rule type ensures that a service resource is available to perform a service appointment. Every scheduling policy needs a work rule of this type, or resource absences aren’t respected during scheduling.

This is a Field Service managed package feature.

It’s common to apply scheduling rules differently to different service resources. For example, you may have different policies on breaks, overtime, or before- and after-work travel time for full-time versus part-time employees. Service Resource Availability work rules let you capture these differences.

Work rules of this type consider the following factors:

- The service resource’s operating hours, which are defined on their service territory member record or—if no hours are specified there—on their service territory record
- Travel time
- The scheduled start and end time of other scheduled appointments

Service Resource Availability work rules have the following settings.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| Fixed Gap                | Enforce a minimum amount of break time between service appointments. This setting is useful for remote consultants. For example, you may want to provide twenty minutes between appointments for record-keeping.  
|                          | **Note:** If a fixed gap is defined, travel time isn’t considered during scheduling. However, travel time is still displayed on the Gantt.                                                                      |
| Minimum Gap (minutes)    | The minimum number of minutes between service appointments. The Minimum Gap value applies only if Fixed Gap selected.                                                                                         |
| Break Start              | The preferred time at which a service resource can take their break. If you don’t want to use breaks, leave this field empty. Breaks are inserted in the schedule between appointments. Breaks are scheduled to start as close as possible to the Break Start time without compromising the ability to start and complete appointments.  
|                          | For example, if service resources can take their lunch anytime after 12:00 PM, enter 12:00.                                                                                                                   |
|                          | **Note:** A service resource’s lunch break is created at the time defined in the Resource Availability work rule when the first service appointment is scheduled in the day. When you drag an appointment or schedule a new one, the Service Resource Availability work rule ensures that the service resource takes a break either at the set Break Start time, or immediately after the last appointment that started before the Break Start. The scheduling engine allows for some flexibility.  
|                          | When a service appointment starts before the Break Start time and ends after, then the break is pushed forward to the end of the service appointment. For example, with Break Start set to 12:00 PM, the scheduling engine can schedule a service appointment from 11:30 AM to 12:30 PM, and move the break to 12:30 PM, so that the service resource’s break starts as soon as the resource has completed that appointment. The lunch break can be moved forward as long as there’s availability.  
|                          | If the travel time to the next appointment prevents the break from being scheduled at the set Break Start time, the break is pushed backward up until the end of the first service appointment scheduled on that day. For example, if the Break Start is set to 12:00 PM and lasts 30 minutes, and a service appointment is scheduled at 12:30 PM to 13:30 PM but includes a 30-minutes travel time to the appointment, the break is pushed backward and scheduled from 11:30 AM to 12:00 PM.  
|                          | If there are multiple service appointments after the Break Start and there’s no room for the break, or if an appointment is extended such that the break straight after it overlaps with the next appointment’s travel time, the break defaults to the Break Start time set in the availability rule. This overlap results in a rule violation. For example, if a Break Start is set to 12:00 PM and a service appointment is scheduled from 11:00 AM to 12:00 PM and you drag another service appointment to 12:00 PM until 1:00 PM, the break doesn’t move to 1:00 PM. A resource availability rule violation is displayed. Also, if you drag an appointment to after the break but its travel time overlaps with the break, the scheduling engine doesn’t move the break, and a rule violation is displayed.  
<p>|                          | <strong>Note:</strong> We recommend that you avoid creating manual breaks. Breaks should only be created and modified by the scheduling engine.                                                                           |</p>
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Break Duration</td>
<td>The length of the fixed break.</td>
</tr>
<tr>
<td>Overtime</td>
<td>Allow service appointments to be scheduled during time slots or shifts of the Extended type. You may need to add this field to the layout.</td>
</tr>
<tr>
<td>Travel From Home (minutes)</td>
<td>The number of minutes that the resource has available for travel before the start of the work day (at the resource’s expense). If this field is empty, any amount of travel before the start of the work day is valid.</td>
</tr>
<tr>
<td>Travel To Home (minutes)</td>
<td>The number of minutes that the resource has available for travel after the end of the work day (at the resource’s expense). If this field is empty, any amount of travel after the end of the work day is valid.</td>
</tr>
</tbody>
</table>

**Important:** To create a Service Resource Availability work rule that creates breaks and calculates travel time, enable the *Calculate travel and breaks* setting in Field Service Settings.

Fill out the travel fields according to where service resources are expected to be at the beginning and end of their periods of availability.

- **On-site:** If a service resource is expected to begin work on-site at the beginning of their availability (for example, if they start work at 9 AM), travel must occur before that time. In this case, fill out the Travel To and From Home fields or leave them blank to allow unlimited travel time.

- **Start driving:** If a service resource is expected to start traveling at the beginning of their availability, set the Travel To and From Home fields to zero.

**Note:** During the scheduling of capacity-based service resources, Service Resource Availability work rules fail if one of the following happens.

- The number of scheduled working hours exceeds the resource’s capacity
- The number of scheduled work items exceeds the resource’s capacity
- A capacity record was deleted or updated after the related service resource was assigned to a service appointment

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.

**Work Rule Type: TimeSlot Designated Work**

Often, field service businesses reserve parts of the day for specific types of work. The TimeSlot Designated Work work rule type ensures that if a time slot is reserved for a specific type of work, only appointments of that type are scheduled in the time slot.

**This is a Field Service managed package feature.**

Time slots reservations are based on service appointment checkbox fields. To learn how to reserve time slots for specific types of appointments, see Reserve Time Slots for Designated Types of Work.

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.

**EDITIONS**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.
Work Rule Type: Working Territories

Sometimes, service resources need to be available to take on work in more than one service territory. The Working Territories work rule type enforces primary and secondary service territory memberships.

This is a Field Service managed package feature.

Service resources can have only one primary service territory at a time, but multiple secondary territories. Optimization requests that include a service resource’s secondary territory memberships must also include the corresponding primary territory membership. By default, the Working Territories rule considers only secondary territories. If you want the optimizer to consider the primary territory as well, select Working Location Enable Primary on the work rule.

A scheduling policy can’t include both a Working Territories work rule and a Match Territory work rule. To choose between them, consider the number of service resources and service territories in your field service operation, and how often service resources are called to work in different territories.

If service resources frequently move between service territories, use a Working Territories work rule. Use relevance groups to differentiate between service resources if some resources move less than others.

Create work rules from the Work Rules tab. To view or add work rule fields, open the Object Manager in Setup and select the Work Rule custom object. Add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.

Create and Manage Service Objectives

Add service objectives to a scheduling policy to indicate your scheduling goals. You can weight each objective to indicate its importance. During schedule optimization, each appointment assignment receives a score from 0 to 100 for every service objective based on how fully the objective was met.

This is a Field Service managed package feature.

Create and manage service objectives from the Service Objectives tab. Add service objectives to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or the Scheduling Policy Objectives related list on a policy.

When you create a service objective, select a record type to define the category that the objective falls into. The following categories are available.

<table>
<thead>
<tr>
<th>Objective Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASAP</td>
<td>Measures the ability to schedule an appointment as soon as possible. The latest scheduling option receives a score of zero, and the soonest option receives a score of 100. If multiple appointments are evaluated simultaneously, the score is based on a range of 0–30 days in the future.</td>
</tr>
</tbody>
</table>

Tip: An ASAP objective can contradict other objectives. For example, scheduling an appointment as soon as possible can result in more travel time. Weight your objectives accordingly.
<table>
<thead>
<tr>
<th>Objective Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimize Overtime</td>
<td>Measures the use of overtime hours. The objective’s score compares the number of overtime hours with the service appointment’s estimated duration. For example, if an hour-long appointment is scheduled entirely on overtime, its score is zero. If half of the scheduled time is overtime, its score is 50.</td>
</tr>
</tbody>
</table>
| Minimize Travel               | Measures the travel time required for a service appointment. In optimization operations—global optimization, resource schedule optimization, in-day optimization, and the Reshuffle action—each scheduling option is scored with the assumption that travel time ranges from zero to 120 minutes. For example, an option with a travel time of 120 minutes receives a score of zero, and an option with a travel time of 60 minutes receives a score of 50. You can ask Salesforce to customize this range. In non-optimization scheduling operations—such as the Book Appointment, Candidates, Schedule, Fill-In Schedule, and Group Nearby Appointments actions—this objective’s score is relative to the travel times available. For example, if an appointment has three scheduling options, here’s how the options are scored.  
  - **Option 1:** Schedule it after an appointment at the same site. The travel time is zero minutes, so the objective score is 100.  
  - **Option 2:** Schedule it after an appointment in a neighboring city. The travel time is 60 minutes, and because it’s the appointment’s maximum potential travel time, the objective score is zero.  
  - **Option 3:** Schedule it after an appointment in a site located 30 minutes away. Because it’s exactly in the middle of the previous options, the objective score is 50.  
  To set the scheduling to exclude from minimize travel consideration the first and last travel of the day, to and from the service resource home base, select **Exclude Home Base Travel**. |
| Preferred Resource            | Measures adherence to a work order’s resource preferences of type Preferred. The objective’s score is 100 if an appointment is assigned to the parent work order’s preferred resource, and zero if not. (Excluded and Required resource preferences are enforced using work rules.) |
| Resource Priority             | Ranks appointments based on their assigned resource’s priority, which is defined in the Priority field on service resources. The lower the resource priority, the higher the objective’s score. |
| Skill Level                   | Measures assigned resources’ adherence to a work order’s skill requirements. When creating an objective of this type, select whether to favor least- or most-qualified service resources:  
  - **Least qualified:** Favors the least qualified valid candidate. This option lets you dispatch a resource who is “good enough” to complete an appointment. For example, if a work order requires the Drilling skill at level 50, a resource with a Drilling skill level of 55 is favored over a resource with a Drilling skill level of 80.  
  - **Most qualified:** Favors the most qualified valid candidate.  
  **Tip:** Use this option with relevance groups to assign your most qualified resources only to work orders for high-priority accounts.  
  If a work order has multiple skill requirements, the objective evaluates all skills and calculates an average score. |
Set Up and Run Optimization Jobs

Optimize your team’s schedule for one or more service territories across a specified range of days. You can configure the optimization to run regularly—for example, every night—or run it manually as needed.

This is a Field Service managed package feature.

To run an optimization manually from the dispatcher console, in the appointment list action menu, select Optimize. Define the service territories, scheduling policy, and other information. Or, follow these instructions to set up a scheduled job.

1. Optionally, exclude service appointments with certain statuses from being changed during schedule optimization.
   a. From the App Launcher, find and open the Field Service Admin app, and then click Field Service Settings > Optimization > Logic.
   b. Under Global Optimization, select the service appointment statuses to exclude from schedule optimization.
   c. Save your changes. The settings apply to optimizations that you run manually or in a scheduled job.

2. On the Logic tab, click the Scheduled Jobs tab.

3. Click New Job, and define the optimization scope.
   a. Select the territories to optimize. We recommend including no more than 100 territories in a job.
   b. (Optional) If you selected multiple territories, select Optimize in stages underneath the territory list. In the Territories Per Stage field, enter the number of territories to optimize at a time. These settings help you stay within the scheduled jobs queue maximum of 100 items, and don’t affect optimization time. We recommend keeping this number low to avoid reaching optimization limits.
   c. For the time horizon, enter the number of days to optimize.
   d. To specify the type of appointments that are optimized, select a filter. Only appointments that meet the criteria are optimized.
   e. Select a scheduling policy to guide the optimization.
   f. Enter an email address where you want optimization job failure messages to be sent.
   g. Select the frequency and schedule.
   h. If your optimization is ready to be run, click Active.
   i. Save your changes.
Note: Optimization applies only to service appointments whose parent appointment is a work order or work order line item. Only active territories included in the scheduled optimization job are optimized.

Global optimization doesn’t reschedule appointments that have rule violations. Unschedule those appointments and reschedule them.

Global and In-day optimization validate that for already scheduled service appointments, the Scheduled End - Scheduled Start time = Duration, while taking resource efficiency into consideration. Service appointments that violate this are unscheduled.

To review limits and limitations related to schedule optimization, see Field Service Limits and Limitations.
Optimize Today’s Schedule

Navigate last-minute schedule upsets by rapidly optimizing your team’s schedule for one or more service territories on the day of service.

This is a Field Service managed package feature.

Schedule optimization in Field Service comes in a few different flavors. While global optimization is the most powerful and thorough option, the quicker, more lightweight in-day optimization is ideal for finalizing the schedule on the morning of service. You can use in-day optimization to optimize multiple days of the schedule, but it’s best suited for addressing last-minute issues.

In-day optimization is available only if optimization is turned on.

1. Optionally, exclude service appointments with certain statuses from being changed during in-day optimization.
   a. From the App Launcher, find and open the Field Service Admin app, and then click Field Service Settings > Optimization > Logic.
   b. At the bottom of the page, select service appointment statuses to exclude from in-day optimization. These preferences also apply to resource schedule optimization. Service appointments with a selected status aren’t scheduled, unscheduled, or rescheduled during in-day optimization. We recommend leaving the Dispatch status deselected so dispatched work can be moved if a previous job runs late or emergency work is needed.

2. To configure a scheduling policy to use in-day optimization rather than the default global optimization, select In-Day Optimization on the policy. You may need to add this field to the scheduling policy page layout.

---

New Scheduling Policy

<table>
<thead>
<tr>
<th>Information</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Scheduling Policy Name</td>
<td>Madison Rigby</td>
</tr>
<tr>
<td>Customer First</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
</tbody>
</table>

In-Day Optimization
Optimize a Single Resource’s Schedule

When last-minute developments occur like canceled jobs, lateness, or emergencies, optimize an individual service resource’s schedule to design the best schedule for them.

This is a Field Service managed package feature.

1. Optionally, exclude service appointments with certain statuses from being changed during resource schedule optimization.
   a. From the App Launcher, find and open the Field Service Admin app, and then click Field Service Settings > Optimization > Logic.
   b. At the bottom of the page, select service appointment statuses to exclude from resource schedule optimization. These preferences also apply to in-day optimization.

      Service appointments with a selected status aren’t scheduled, unscheduled, or rescheduled during resource schedule optimization. We recommend leaving the Dispatch status deselected so dispatched work can be moved if a previous job runs late or emergency work is needed.

2. Optimize any service resource’s schedule.
   a. From the dispatcher console, click the action menu of the resource whose schedule you want to optimize.
   b. Click Resource Schedule Optimization.
   c. Define the scope of your optimization. Service appointments are scheduled only within the dates you select, but candidate service appointments can come from outside the time frame. When selecting a category in Keep these appointments scheduled, keep in mind that resource schedule optimization fails if more than 50 appointments must remain scheduled. The optimization can move and reschedule the kept appointments. Resource schedule optimization fails if the resulting schedule doesn’t include all the service appointments marked to keep scheduled. To optimize, give these appointments a much higher priority than the other appointments, or try to run optimization on more days.
   d. Click Optimize.

You can also set up scheduling preferences to automatically run resource schedule optimization in response to common scheduling events, like appointment overlaps or cancellations. To learn how, see Create Scheduling Recipes for Common Events.

Note:

- Complex work information that’s not fully available in the optimization data is considered excluded from resource schedule optimization. For example, a partial chain of a scheduling dependency is excluded.
- Resource schedule optimizations can’t run in parallel for the same service resource on the same time interval.
- You can’t run resource schedule optimization on capacity-based resources.
Optimize Appointments Using Priorities

When your team’s availability is limited, prioritize critical service appointments over less pressing work. You can assign dynamic priorities, such as values that increase as due dates approach. Optimization can consider priority values when it assigns appointments to time slots.

This is a Field Service managed package feature.

How you use priority values in scheduling depends on your business. Service level agreements and other factors can affect how you prioritize work. The type of work, due dates, or a combination of factors can influence appointment priorities.

After you identify what drives your priorities, define settings so that optimization and scheduling can prioritize visits.

1. Specify a priority field.

   In the Field Service Admin app, under Field Service Settings > Scheduling > General Logic, select a priority field. You can choose one or more fields on service appointments, work orders, and work order line items.

   - Assign a fixed priority. For example, the managed package provides the Scheduling Priority field on parent work orders and work order line items. By default, Scheduling Priority values are 1–4, where 1 is Critical and 4 is Low.
   - Create a dynamic priority field using a custom formula field. For example, create a formula that sets appointment priorities based on the difference between today’s date and the due date.

   Scheduling and optimization look at the service appointment priority field first. If that field is not defined or empty, then the appointment’s priority is derived from the field on the parent work order or work order line item.

2. Select a priority scale.

   The default priority range is a 1–10 scale, where 1 is the highest priority and 10 is the lowest priority. The 1–10 scale works well for most priority cases. If your use case requires a broad range of values, go to Field Service Settings > Scheduling > General Logic in the Field Service Admin app, and select the optional 1–100 scale.

After you configure priority settings, you’re ready to optimize. If you want to schedule and prioritize many appointments, use Global or In-Day optimization. When availability is limited, optimization bumps lower priority assignments and schedules higher priority appointments in those slots.

If you have just a few urgent appointments, you can use priorities with scheduling actions, such as Get Candidates, Book Appointments, or Schedule. Add the field Schedule over lower priority appointment to the service appointment page layout. When you select this Boolean field on appointments, scheduling actions consider the appointment’s priority.
Create Scheduling Recipes for Common Events

Tackle common scheduling challenges with simple optimization "recipes" that address what happens to your schedule after appointment cancellations, time changes, and overlaps. Cover all scenarios by creating multiple recipes for each category.

Create Scheduling Recipes for Common Events

This is a Field Service managed package feature.

Scheduling recipes are an optimization feature. They use resource schedule optimization, which means that only the affected service resource’s schedule is optimized.

1. From the App Launcher, find and open the Field Service Admin app.
2. Click the Field Service Settings tab, and then click Automated Scheduling.
3. In the New Recipe menu, select a category. We’ve provided some example recipes to get you started. You can activate them or create your own.
4. Customize your recipe’s settings. Then, activate and save it. Inactive recipes aren’t enforced.
   - The Status Categories field lets you limit which appointments the recipe applies to. For example, if you select only the Scheduled value on a recipe for shortened appointments, the recipe runs only if an appointment’s status is in the Scheduled status category when the appointment is shortened. Excluding the Canceled status category, the appointment’s status must also be a pinned status, which is set in Field Service Settings > Optimization > Logic.
   - The Initiating User Permission Set field lets you decide which users can trigger the recipe. For example, if you’re creating a recipe for canceled appointments, select Community to run the recipe only for appointments canceled by an Experience Builder site user (typically, a customer). The values in this field correspond to the permission sets provided by the managed package.

<table>
<thead>
<tr>
<th>Initiating User Permission Set Value</th>
<th>Corresponding Permission Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource</td>
<td>Field Service Resource</td>
</tr>
<tr>
<td>Dispatcher</td>
<td>Field Service Dispatcher</td>
</tr>
<tr>
<td></td>
<td>Field Service Community Dispatcher</td>
</tr>
<tr>
<td>Agent</td>
<td>Field Service Agent</td>
</tr>
<tr>
<td>Admin</td>
<td>Field Service Admin</td>
</tr>
<tr>
<td>Community</td>
<td>Field Service Self Service</td>
</tr>
</tbody>
</table>

5. To change the priority order of recipes within a category, click on the Automated Scheduling home page. Drag the recipes into the desired order and click Save.

Considerations for Scheduling Recipes

- You can create up to 75 active recipes per category, and up to 1000 recipes per org.
- For Shortened Appointment scenarios, scheduling recipes only try to fill one empty space per day for each service resource.
- For Shortened Appointment scenarios, scheduling recipes support only a single operating hours timeslot per day.
- Scheduling recipes support only operating hours and timeslots, not shifts.
For Shortened Appointment, Late-End Overlap, and Emergency Overlap scenarios, scheduling recipes are only triggered if the service appointment’s status has been selected as a pinned status for In-Day Optimization. We recommend leaving the Dispatch status deselected so dispatched work can be moved if a previous job runs late or emergency work is needed.

If you have access to 2,000 or more service territories, the appointment list shows only selected territories. Use the search bar to find territories that aren’t selected.

**Scheduling Recipe Scenarios**

Automate how Field Service handles common situations that cause gaps or overlaps in your schedule, like the following.

- An appointment is canceled
- A mobile worker finishes early
- A mobile worker finishes late and has overlapping appointments
- An emergency causes appointments to overlap

Certain conditions trigger a scheduling recipe, for example, appointment status categories. Recipes are triggered only for in-day of service changes to address last-minute issues to an individual service resource’s schedule.

You can set the scheduled appointment’s Status Category to change after optimization to Scheduled or Dispatched, and mark resulting unscheduled appointments as In Jeopardy with a jeopardy reason.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Trigger Criteria</th>
<th>Expected Behavior (Result)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canceled Appointment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
- Status Category = Canceled  
- The service appointment is canceled on the day of service.  
- Service appointments must meet the set recipe criteria. |  
- **Preserve Current Schedule** - The optimization minimizes any changes to the schedule by leaving as many scheduled appointments as is, and filling the gap with the best match from the next 100 appointments scheduled for that resource.  
- If the resource’s Last Known Location is valid (last updated within the set time limit), this location is also considered when scheduling to prevent unnecessary travel. |
| Shortened Appointment |  
- Status Category = Completed/Cannot Complete/Canceled  
- Service appointments must meet the set recipe criteria.  
- The service appointment’s Scheduled End is shortened and the gap created is large enough to fill. The minimum schedule space created for the recipe to apply is 10 minutes (default is 15 minutes). |  
- **Preserve Current Schedule and Fill Gaps** - Finishing work early frees up the schedule. The optimization minimizes any changes to the schedule by leaving as many scheduled appointments as is, and filling the gap with the best match from the next 100 appointments scheduled for that resource. |
| Late-End Overlap |  
- The service appointment’s Scheduled End is updated to a later time. The minimum overlap for the recipe to apply is 1 minute (default is 10 minutes).  
- Service appointments must meet the set recipe criteria. |  
- **Preserve Current Schedule** - If an appointment is taking longer than expected, the rest of the day is at risk. The optimization minimizes any changes to the schedule by leaving as many scheduled appointments as is, and scheduling an appointment from the next 100 appointments scheduled for that resource. |
<table>
<thead>
<tr>
<th>Scenario</th>
<th>Trigger Criteria</th>
</tr>
</thead>
</table>
| Emergency Overlap| • The service appointment’s Emergency = True, and the Status Category = Scheduled/Dispatched.  
|                  | • The minimum overlap for the recipe to apply is 1 minute (default is 10 minutes). |
|                  | • Emergency dispatches can take the resource off-route. When an emergency appointment is dispatched and results in scheduling issues, optimization reschedules the rest of the resource’s day as needed in order to revolve around the emergency location and other pinned service appointments, while adhering to the scheduling policy objectives. |
|                  | • The next appointment is scheduled from the next 100 appointments scheduled for that resource. |
Example: Here’s a recipe that controls what happens to the assigned resource’s schedule when a solar appointment in the San Francisco service territory ends early and results in 60 unused minutes on the schedule.

Automated Scheduling

Scheduling Recipes

Solar appointment ends early (SF)
Re-optimize the resource’s schedule using the Customer First policy.

- Choose what to do with the available time in the schedule when an appointment ends early.
- When a service appointment’s scheduled End is updated to an earlier time, try to schedule other appointments in the available time while minimizing changes to the resource’s schedule.
- Minimum schedule space created for recipe to apply (minutes)

Run this recipe only for service appointments that meet the following criteria. Optionally, add custom criteria to further limit which appointments the recipe applies to.

Service Territories
San Francisco:

Work Types
Solar Panel Installation, Solar Panel Repair, Solar Panel Maintenance:

Status Categories
6 Options Selected:

Initiating User Permission Set
4 Options Selected:

Custom Criteria Logic
Select:

Optimize With Scheduling Policy
Customer First:

Actions to Take After Optimization

- Change scheduled appointments status
- Mark unscheduled appointments as In Jeopardy

Keep Original Status

Cancel Save
Monitor Optimization Requests

Keep an eye on all schedule optimization requests from the Gantt or the Optimization Requests custom tab.

This is a Field Service managed package feature.

From the Optimization Requests tab

Create a custom tab for the Optimization Request object, and customize the list view to show useful fields like Status, Start, Finish, and Failure Reason. Click any request to view its details.

Tip: Add the Failure Details field and Notes and Attachments related list to the optimization request page layout. These page elements give you a fuller view of the request.

From the Gantt

Click the lightbulb icon at the top of the Gantt to view the status of recent optimization requests. When a global optimization request is in progress, you can see a percentage-based progress bar and the option to cancel the request.
In-day optimization progress appears below the Gantt’s time axis.

A percentage-based progress bar isn’t available for resource schedule optimization requests, but the resource’s row in the Gantt changes color to indicate that optimization is in progress.

**Why did my request fail?**
Salesforce sometimes cancels optimization requests to protect the integrity of your schedule. Here are the most common reasons a request fails.

- If a request stays in the same status for longer than the configured limit, it’s canceled. The limit varies depending on the status and the type of optimization.
- If optimization runs longer than your org’s session timeout value, it gets stuck in the “In Progress” status. The optimization job fails, resulting in an error when it tries to deliver the results to your Salesforce org.

To avoid failed optimizations, increase your session timeout value to at least 2 hours, or select a quicker optimization run time.
Scheduled optimization jobs can generate one or more JSON files. The request fails if a JSON file contains more than 6 million characters.

To check whether an optimization job exceeded this limit, go to the Optimization Requests tab. Open the request associated with the failed job, and click the value in the Optimization Data field. In the Notes and Attachments related list, open each JSON file and check its character total.

If the Optimization Data field is empty, check the Error field for details. If the Error field is empty, contact Salesforce to learn more about the failure.

If simultaneous conflicting updates are made to the schedule while a request is open, the request is canceled. For example, this can happen when you add or update appointments or resource absences that fall into the date range and service territory being optimized.

Resource schedule optimization fails if more than 50 service appointments are required to remain scheduled during the optimization. To change which appointments must remain scheduled, select a different category in Keep these appointment scheduled when you run the optimization. For example, if In Jeopardy is selected and more than 50 appointments are in jeopardy for the selected time period, the request fails.

To review limits and limitations related to schedule optimization, see Field Service Limits and Limitations.

Create Relevance Groups

A relevance group is a group of service appointments or service territory members that require their own work rules or service objectives. For example, use relevance groups to enforce your company policy on breaks and travel time for full-time versus part-time employees.

This is a Field Service managed package feature.

You can base a relevance group on any standard or custom Boolean (true or false) field for service appointments or service territory members. When you create a work rule or service objective, select a field to limit the scope of the rule or objective.

To use relevance groups, add the relevance group Visualforce pages to your work rule and service objective page layouts.

1. In the layout editor, open a work rule or service objective page layout—for example, the Match Boolean work rule page.

2. Select Visualforce pages, and drag one of the following pages onto the detail page layout. We recommend giving it its own section for clarity.

   - Work rules: Vf001GroupOnWorkRules
   - Service objectives: Vf002GroupOnObjectives

3. Save your changes.

You can apply a work rule or service objective to a subset of service territory members or service appointments. Select the limiting Boolean field on the work rule or service objective detail page.

Note: Relevance groups can use primary service territory memberships and relocation service territory memberships. Secondary service territory memberships aren’t supported.
**Example:** Use relevance groups to define different limits on travel from home for part-time and full-time employees.

1. Add the appropriate Visualforce page to the Maximum Travel From Home work rule page layout.

2. On the service territory member object, create two checkbox fields:
   - **Part-Time**
   - **Full-Time:** A formula field that updates to `false` when Part-Time is `true`

3. Create a Maximum Travel From Home work rule that reflects your travel time policy for part-time employees. For Service Territory Member, select **Part-Time**.

4. Create another Maximum Travel From Home work rule that reflects your travel time policy for full-time employees. For Service Territory Member, select **Full-Time**.

5. Add both rules to a scheduling policy. When the policy is applied, part-time and full-time employees are evaluated based on the requirements outlined in the respective work rules.

Relevance groups must be mutually exclusive. If two work rules with relevance groups overlap, the more restrictive rule is used. If Service Resource Availability work rules use relevance groups, any rule overlaps will lead to an error.
Work in the Dispatcher Console

The Field Service dispatcher console is the main working space for dispatchers. It features a dynamic map and a highly customizable Gantt chart showing upcoming appointments, active team members, and more. To reach the dispatcher console, from the App Launcher, find and open the Field Service app, and then click the Field Service tab.

This is a Field Service managed package feature.

The dispatcher console is supported on desktop only. For the best dispatcher console experience, we recommend using a screen resolution of 1920 x 1080 pixels, or a minimum of 1366 x 768 pixels, at 100% zoom. User idle time is monitored to reduce unnecessary Gantt refreshes and improve computer performance. If you haven’t actively interacted with the dispatcher console for 15 minutes, a message is displayed for you to reload the page to continue.

IN THIS SECTION:

Customize the Dispatcher Console

Make the dispatcher console work for you! Adjust the time frame and contents of the appointment list and Gantt, customize each section’s layout, create custom actions for dispatchers, and create custom appointment list filters.

Work in the Dispatcher Console Appointment List

The service appointment list on the left side of the dispatcher console contains a list of service appointments. You can filter, sort, and search within the list, and perform actions on selected appointments.

Work in the Dispatcher Console Gantt

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

Work in the Dispatcher Console Map

The dispatcher console map gives dispatchers a dynamic bird’s-eye view of their mobile workforce. Learn how to customize the map view and draw territories directly on the map.

Customize the Dispatcher Console

Make the dispatcher console work for you! Adjust the time frame and contents of the appointment list and Gantt, customize each section’s layout, create custom actions for dispatchers, and create custom appointment list filters.

This is a Field Service managed package feature.

IN THIS SECTION:

Control Which Appointments Appear in the Dispatcher Console

Dispatchers can view and filter service appointments in the appointment list and in the Gantt chart. Learn how to control which appointments appear in these sections of the dispatcher console.

Customize the Dispatcher Console with Field Sets

Use field sets to control which fields appear in different sections of the Field Service dispatcher console. For example, choose which fields appear as columns in the appointment list.
Create Custom Actions for the Dispatcher Console

Put the right actions at your dispatchers’ fingertips by adding custom actions to 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 keep the dispatcher console tidy, actions are shown in dropdown action lists with icons.

Create Custom Appointment List Filters

Create custom filters to control which appointments appear in the dispatcher console service appointment list. Base your filters on service appointment fields and add custom logic. Dispatchers can create private filters or share them with others.

Create Custom Appointment Icons

Add custom icons to service appointments on the Gantt, map, and appointment list so dispatchers can quickly identify appointment characteristics. For example, use a custom icon to indicate that an appointment is for a VIP or first-time customer.

Control Which Appointments Appear in the Dispatcher Console

Dispatchers can view and filter service appointments in the appointment list and in the Gantt chart. Learn how to control which appointments appear in these sections of the dispatcher console.

This is a Field Service managed package feature.

Control the Time Frame

These settings control the Gantt time frame.

- **Gantt filter (1):**
  - On the Hours tab, choose which hours of the day are shown on the Gantt, and adjust settings for the Long-Term view.
  - On the Utilization tab, specify how many days are shown when the Utilization view is applied.

- **Gantt resolution dropdown (2):** Select how many days to show on the Gantt at once. Customize the Utilization view from the Gantt filter’s Utilization tab, and the Long-Term view from the Gantt filter’s Hours tab. You need the Longterm View custom permission to select the Long-Term view.

- **Date and calendar toggles (3):** Toggle between days and months.

These settings control the appointment list time frame.
• **Horizon date (4):** The appointment list only lists appointments with a date field that falls before the horizon.

• **Match Gantt Dates field (5):** If you select Match Gantt Dates, the horizon date updates to match the dates shown on the Gantt.

• **Scheduling Window Length (6):** Click the gear icon and select Dispatch Console Settings to define the scheduling window length, which represents the number of days before the horizon date. The appointment list only lists appointments with a date field that falls in that span of days before the horizon date.

**Note:** If a custom filter is applied, the appointment list time frame is controlled by the horizon date and the custom filter settings. Custom filters let you specify the number of days before and after the horizon, and that time frame is used to define which appointments are shown.

**Note:** The number of service appointments that are loaded to the Gantt depends, for example, on the Dispatch Console Settings. You can change these settings to load service appointments related to the territory. While loading service appointments you may get an error that the scheduling horizon is too long. To avoid this:

- Reduce the Scheduling Window Length.
- Remove service appointments that aren’t associated with a territory.
- Reduce the list of service territories.
- When creating a custom filter in the dispatcher console, make sure to add appropriate filters to the list view. In the Data Selection section of the Filter Editor, reduce the data range for showing appointments (select fewer days before and after the horizon date).

**Control Which Appointments Are Shown**

The date field dropdown menu in the dispatcher console control which appointments are visible in the appointment list. If the value of any of the selected date fields on an appointment falls within the specified time frame, the appointment appears in the appointment list.

If an appointment’s dates for any selected fields among the first six don’t fall within the Gantt time frame, use the Gantt Display Date to show the appointment on the Gantt. 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 may want to see it on the Gantt every day as a reminder.

**Tip:** Set up a process in Process Builder to automatically configure an important appointment’s Gantt Display Date to today’s date, updated daily.

In addition, several types of filters let you refine which appointments are shown in the dispatcher console:

- The appointment list search, which filters the list to show only appointments that match your search criteria
- The resource list search in the Gantt, which filters the resource list to show only service resources that match your search criteria
• The Resources and Skills tabs in the Gantt filter, which filter the resource list to show only service resources that match your criteria
• The territory filter, reached from the map icon in the appointment list (6), which filters the Gantt and appointment list according to your criteria
• Any custom appointment list filters in place

Customize the Dispatcher Console with Field Sets

Use field sets to control which fields appear in different sections of the Field Service dispatcher console. For example, choose which fields appear as columns in the appointment list.

This is a Field Service managed package feature.

To manage a field set, from the Object Manager, find the object whose field set you want to edit—for example, Service Resource. Then, click Field Sets.

Field sets support the following field types: Number, Text, Date, Date/Time, Currency, and Reference (lookup fields). The Field Service managed package also provides additional field sets not included in this article.

Service Appointment Field Sets

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Description</th>
<th>Location in Dispatcher Console</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capacity Service Columns</td>
<td>Controls the columns on the dialog screen shown when a user double-clicks a capacity record on the Gantt. This field set supports up to 9 fields.</td>
<td></td>
</tr>
<tr>
<td>Crew Management</td>
<td>Controls which fields are shown when a user double-clicks a service appointment from the Crew Schedule row in the Crew Management Gantt.</td>
<td></td>
</tr>
</tbody>
</table>

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.
### Field Service

#### Customize the Dispatcher Console

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Description</th>
<th>Location in Dispatcher Console</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crew Management Tooltip</td>
<td>Controls which fields are shown when a user hovers over an appointment in the Crew Management Gantt.</td>
<td><img src="image" alt="Crew Management Tooltip" /> Note: Lookup fields and fields without values aren’t displayed. The Required Skills field is always shown.</td>
</tr>
<tr>
<td>Designated Work Fields</td>
<td>Controls which fields are available when a user is creating a designated time slot from the time slots editor Visualforce page on the operating hours record.</td>
<td><img src="image" alt="Designated Work Fields" /></td>
</tr>
<tr>
<td>Gantt Filter</td>
<td>Controls the Additional Criteria fields shown when creating a custom Gantt filter.</td>
<td><img src="image" alt="Gantt Filter" /> Additional Criteria: 1. Account equals 2. Status contains 3. Emergency equals true 4. -- None -- 5. -- None --</td>
</tr>
</tbody>
</table>

**Required Skills:** Appointment has no required skills.  
**Scheduled Start:** Wednesday, July 31, 2019 9:00 AM  
**Scheduled End:** Wednesday, July 31, 2019 10:00 AM  
**Due Date:** Wednesday, July 31, 2019 1:40 PM
<table>
<thead>
<tr>
<th>Field Set</th>
<th>Description</th>
<th>Location in Dispatcher Console</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Appointment Expanded</td>
<td>Controls the mini layout displayed when the user clicks an appointment in the appointment list. The mini layout supports up to 12 fields.</td>
<td><img src="image" alt="Mini Layout Example" /></td>
</tr>
<tr>
<td>Service Appointment List Columns</td>
<td>Controls the fields that appear in the appointment list as columns. The appointment list supports up to six columns. You can include Gantt or custom icon fields in columns. <strong>Note:</strong> Custom appointment list filters include appointment list column settings. If such a filter is applied, it overrides this field set.</td>
<td><img src="image" alt="List Columns Example" /></td>
</tr>
<tr>
<td>Service Appointment List Preview</td>
<td>Controls the fields that appear when a user hovers on the appointment information icon.</td>
<td><img src="image" alt="List Preview Example" /></td>
</tr>
<tr>
<td>Field Set</td>
<td>Description</td>
<td>Location in Dispatcher Console</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Service Appointment Resource</td>
<td>Controls the fields displayed on the tooltip when a user hovers over an appointment on the service resource.</td>
<td></td>
</tr>
<tr>
<td>Calendar Tooltip</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Appt Resource Calendar</td>
<td>Controls the fields displayed on appointments on the service resource calendar Visualforce page.</td>
<td></td>
</tr>
<tr>
<td>Display</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Field Set</td>
<td>Description</td>
<td>Location in Dispatcher Console</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>Service Info Window Map</td>
<td>Controls the layout of the dialog screen displayed when the user double-clicks an appointment on the map.</td>
<td><img src="image" alt="Dispatcher Console Diagram" /></td>
</tr>
<tr>
<td>Service Lightbox Address</td>
<td>Controls which fields are displayed under Address when a user double-clicks a service appointment in the Gantt.</td>
<td><img src="image" alt="Dispatcher Console Diagram" /></td>
</tr>
</tbody>
</table>
### Service Lightbox Time
- **Description**: Controls which fields are displayed under Date & Time when a user double-clicks a service appointment in the Gantt.

### Service Tooltip Gantt
- **Description**: Controls the tooltip layout shown when hovering over an appointment on the Gantt. This field set supports up to 10 fields.

### Service Resource Field Sets

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Description</th>
<th>Placement in Dispatcher Console</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crew Management Resource Lightbox</td>
<td>Controls the fields shown when a user double-clicks a service resource in the Crew Management Gantt.</td>
<td><img src="image" alt="Crew Management Resource Lightbox" /></td>
</tr>
</tbody>
</table>

### Location in Dispatcher Console

**Service Lightbox Time**
- **Description**: Controls which fields are displayed under Date & Time when a user double-clicks a service appointment in the Gantt.

**Service Tooltip Gantt**
- **Description**: Controls the tooltip layout shown when hovering over an appointment on the Gantt. This field set supports up to 10 fields.

**Service Resource Field Sets**
- **Crew Management Resource Lightbox**: Controls the fields shown when a user double-clicks a service resource in the Crew Management Gantt.
<table>
<thead>
<tr>
<th>Field Set</th>
<th>Description</th>
<th>Placement in Dispatcher Console</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency Fields</td>
<td>Controls the fields displayed for a service resource in the Emergency Chatter action.</td>
<td></td>
</tr>
<tr>
<td>Get Candidates Resource Details</td>
<td>Controls the fields shown when expanding a resource row on the Candidates Chatter action.</td>
<td>[Image]</td>
</tr>
</tbody>
</table>

**SA-0070**  | **SERVICE APPOINTMENT**  | **MAP**  | **ACCOUNT**

- **Details**  
- **Feed**  

**Current Schedule**  
Scheduled for SF Roof Repair Crew on Wed, Jul 31, 2019 8:00 AM

**SF Roof Repair Crew**  
1 Options, Starting Wed, Jul 31, 2019 8:00 AM

- **Name**: SF Roof Repair Crew  
- **Gantt Label**: SF Roof Repair Crew  
- **Capacity Based**: false  

- **Wed, Jul 31, 2019 8:00 AM**  

[100/100]
<table>
<thead>
<tr>
<th>Field Set</th>
<th>Description</th>
</tr>
</thead>
</table>
| Resource Gantt Filter | Controls the available fields in Gantt Resource Filters. The fields are shown in these sections:  
  - Sort by  
  - Checkbox filters (if the field is of type Checkbox)  
  - One of the following properties picklist (if the field is of type Picklist) |

**Placement in Dispatcher Console**

1. Sort by: Name
2. Show working resources only, Capacity-Based, Active
3. Resource Type: Technician, Dispatcher, Crew, Agent, Asset, None

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Description</th>
<th>Placement in Dispatcher Console</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Lightbox</td>
<td>Controls the layout of the dialog screen displayed when the user double-clicks a service resource in the Gantt.</td>
<td><img src="image-url" alt="Dispatcher Console Layout" /></td>
</tr>
</tbody>
</table>
### Gantt Lightbox

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Description</th>
<th>Placement in Dispatcher Console</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Account</strong></td>
<td>Controls the layout of the dialog screen displayed when a user double-clicks an appointment on the Gantt and clicks the Account tab.</td>
<td><img src="image1" alt="Account Placement" /></td>
</tr>
<tr>
<td><strong>Work Order</strong></td>
<td>Controls the layout of the dialog screen displayed when the user double-clicks an appointment on the Gantt, and then clicks the Work Order tab. Applies only to service appointments whose parent record is a work order.</td>
<td><img src="image2" alt="Work Order Placement" /></td>
</tr>
<tr>
<td><strong>Work Order Line Item</strong></td>
<td>Controls the layout of the dialog screen displayed when the user double-clicks an appointment on the Gantt, and then clicks the WOLI tab. Applies only to service appointments whose parent record is a work order line item.</td>
<td><img src="image3" alt="Work Order Line Item Placement" /></td>
</tr>
</tbody>
</table>
### Resource Absence Field Sets

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Description</th>
<th>Placement in Dispatcher Console</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Absence Calendar</td>
<td>Controls the fields displayed on the tooltip when the user hovers over an absence on the service resource calendar Visualforce page on a service resource record.</td>
<td><img src="image1" alt="Tooltip Image" /></td>
</tr>
<tr>
<td>Tooltips</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource Absence Lightbox</td>
<td>Controls the layout of the dialog screen displayed when a user double-clicks a resource absence on the Gantt.</td>
<td><img src="image2" alt="Lightbox Image" /></td>
</tr>
<tr>
<td>Resource Absence Calendar</td>
<td>Controls the fields displayed on absences on the service resource calendar Visualforce page.</td>
<td><img src="image3" alt="Calendar Image" /></td>
</tr>
<tr>
<td>Resource Calendar</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Create Custom Actions for the Dispatcher Console

Put the right actions at your dispatchers’ fingertips by adding custom actions to 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 keep the dispatcher console tidy, actions are shown in dropdown action lists with icons.

This is a Field Service managed package feature.

You can add custom actions to several areas in the dispatcher console:

- Individual or multiple appointments in the appointment list
- Individual or multiple appointments in the Gantt
- Individual service resources or resource absences in the Gantt
- Polygons on the map (the action runs on the appointments within a polygon)

For example, create an action that does one of the following things:

- Calls an Apex class that reassigns all selected service appointments to a different service resource
- Opens a Visualforce page where the dispatcher can update the Earliest Start Permitted on all appointments within a polygon—for example, if the polygon represents a flood in the service territory

1. Decide what you want your action to do and where it appears on the Gantt.
2. Create an Apex class or Visualforce page to connect to an action.
   Apex classes or Visualforce pages intended for custom dispatcher console actions must be configured a certain way. For details, see Code Samples: Custom Dispatcher Console Actions.
3. Create and assign a custom permission to limit who sees the action, or select an existing permission to use.
4. From the App Launcher, find and open the Field Service Admin app. Click the Field Service Settings tab, and then click Dispatcher Console UI > Custom Actions.
5. In the left-hand column, select an action category to define the location and breadth of the action.
6. Click New Action and enter your details.
   - **Label in Dispatcher Console**: Enter the action label that dispatchers see in the dispatcher console.
   - **Action Type**: Select Apex Class or Visualforce.
   - **Apex Class**: If you selected Apex Class as the type, select the Apex class that you want the action to call.
   - **Visualforce Page**: If you selected Visualforce as the type, select the Visualforce page that you want the action to open.
   - **Required Custom Permission**: Select the custom permission that users must have to see the action.
   - **Icon**: Select an icon to display next to the action label.
7. Click Save.
8. Optionally, reorder the actions in the action category you selected. Custom actions appear in this order in an action list after standard actions.

When you create or edit a custom action, the Gantt must be refreshed for the changes to take effect.
Create Custom Appointment List Filters

**USER PERMISSIONS**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Permission Set(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>To configure the Field Service managed package:</td>
<td>Customize Application</td>
</tr>
<tr>
<td>To assign a permission set license:</td>
<td>Manage Users</td>
</tr>
<tr>
<td>To create a permission set:</td>
<td>Manage Profiles and Permission Sets</td>
</tr>
<tr>
<td>To create, edit, and delete custom filters:</td>
<td>Field Service Dispatcher or Field Service Admin custom permission sets AND Create Filter custom permission</td>
</tr>
<tr>
<td>To share personal custom filters and edit and hide public custom filters:</td>
<td>Field Service Dispatcher or Field Service Admin custom permission sets AND Create Filter custom permission AND Publish Filter custom permission</td>
</tr>
</tbody>
</table>

Create custom filters to control which appointments appear in the dispatcher console service appointment list. Base your filters on service appointment fields and add custom logic. Dispatchers can create private filters or share them with others.

⚠️ This is a Field Service managed package feature.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab. Click Dispatcher Console UI and select Enable Custom Filters.
   
   Note: The custom filters feature replaces the appointment list’s original custom list view functionality. Enabling custom filters removes any existing custom list views.

2. To open the dispatcher console, from the App Launcher, find and open the Field Service app.

3. To the right of the filter dropdown menu, click the New icon.

4. Add a filter name and description.

5. Choose whether the filter displays appointments based on the number of days before and after the horizon date, or appointments currently shown on the Gantt (similar to the Gantt standard filter).

   Note: The horizon date related to the selected date properties and the Earliest Start Permitted, Due Date, Arrival Window Start, Arrival Window End, Scheduled Start, and Scheduled End fields.

   - Standard filters let you set the scheduling window limit and the number of days up to and including the selected horizon date. The default value is 14 days.
   - Custom filters let you specify how many days to display before and after the horizon date.

6. Add criteria to your filter.
Note: The Gantt Filter field set on the service appointment object controls which fields are shown. Standard and custom service appointment fields are supported. Multi-select picklist fields aren’t supported.

7. To filter appointments that are causing rule violations, add the Rule Violations criteria to your filter. To exclude rule violators, add Rule Violations Equals False. To include rule violators, add Rule Violations Equals True.

8. Adjust filter logic.

Tip: To dynamically consider date and time fields, use formula fields. For example, Due date in 2 days Equals True.

9. Under Fields to Display, select fields to show in the appointment list when the filter is applied.

10. To publish or share your filter, select Make this filter available for all users.
    When a custom filter is made public, it’s shared with the All Internal Users public group.

11. Click Save.

12. To hide a public custom filter, click the down arrow next to the filter and select Hide.

Note: Admins can expose hidden filters by editing the custom filter record itself and setting Hidden to false.

Considerations

- The maximum number of days before and after the horizon date is 30 days.
- To avoid performance issues, we recommend keeping the number of fields on the Gantt Filter page layout below 15.
- All users have access to the standard filters provided with the managed package, but you can hide them. Remove the appropriate custom permission from the user profile or assigned permission set. The All Service Appointments list can’t be hidden and is always available in the dispatcher console service appointment list.
- If only certain users need access to a custom filter, share the custom filter record with the public group or users. For example, if only San Francisco dispatchers need access to the “Bay Area Emergency Work” custom filter, create a private custom filter. Then, share “Bay Area Emergency Work” with the San Francisco public group using standard sharing.
Create Custom Appointment Icons

Add custom icons to service appointments on the Gantt, map, and appointment list so dispatchers can quickly identify appointment characteristics. For example, use a custom icon to indicate that an appointment is for a VIP or first-time customer.

This is a Field Service managed package feature.

The Gantt is chock-full of information. Icons are a great way to share information without cluttering your screen. While icons are set at the individual appointment level, you can set up triggers to populate the Gantt Icon field on appointments of a certain type.

1. Add the Gantt Icon field to service appointment page layouts.
2. Navigate to the service appointment that needs the icon.
3. In the Gantt Icon field, enter an icon URL. The URL must end in an image suffix, such as .png or .gif. We scale the image to 16 x 16 pixels, so square images look best.
4. Save your changes. Dispatchers can see the icon on the appointment in the Gantt and the dispatcher console map. Images with a transparent background appear with a white background.

In the appointment list, you can also include columns that show Gantt or custom icons. For example, set up a formula field that selects an icon image. Add the fields to show in the Service Appointment List Columns field set.

Example: Add an ice cream icon to an appointment that’s next to your favorite ice cream shop. Find a URL that leads to an ice cream icon, and paste the link into the appointment’s Gantt icon field. (Of course, we recommend scheduling a snack break after the appointment.)

Example: Add an ice cream icon to an appointment that’s next to your favorite ice cream shop. Find a URL that leads to an ice cream icon, and paste the link into the appointment’s Gantt icon field. (Of course, we recommend scheduling a snack break after the appointment.)
Work in the Dispatcher Console Appointment List

The service appointment list on the left side of the dispatcher console contains a list of service appointments. You can filter, sort, and search within the list, and perform actions on selected appointments.

This is a Field Service managed package feature.

From within the appointment list, you can:

- View the scheduling policy that’s currently applied, and apply a new one
- Select the date fields that are considered when filtering appointments to show on the Gantt
- Customize the Gantt’s time frame by adjusting its horizon or opting to make the appointment list match the Gantt’s date range
- Schedule and dispatch service appointments
- Optimize your schedule
- Flag and unflag appointments
- Filter the appointment list based on a search query or appointment status
- Filter the appointment list by service territory
- Show icons and appointment details to communicate information quickly
- Customize the dispatcher console settings by clicking the gear icon in the top right-hand corner of the list

Search the Appointment List

To search within the appointment list, enter two or more characters in the search field. Separate multiple keywords with a comma, which applies an OR condition to the search.

When you enter a query, the list updates to show only service appointments with at least one matching property. If no appointments match your query, click Search All Records in the body of the list to search all appointments in your org. From the resulting list of appointments, you can force-add an appointment to the list that doesn’t match the Gantt loading criteria. The Search All Records action only supports search queries of a complete service appointment number or record ID.

These service appointment fields are scanned in searches:

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

Filter the Appointment List

Filters, similar to list views, control which service appointments are shown in the appointment list. The list is also filtered based on the horizon, selected date fields, and search values.

Apply a filter by selecting one from the filter dropdown menu in the appointment list (1). Select appointments using different filters. Click the link to see the selected list (2)
You can choose from the following filters. All users have access to these filters. The filters consider the status category, which maps all standard and custom status values to categories corresponding to the default status values. Conditions have an OR statement between them.

<table>
<thead>
<tr>
<th>Filter Name</th>
<th>Definition</th>
</tr>
</thead>
</table>
| Todo                 | Service appointments that are awaiting an action from the dispatcher. It includes appointments that match one of these criteria:  
• The status category is None  
• The appointment has rule violations  
• The appointment is In Jeopardy and is not Canceled or Completed |
| All Service Appointments | All service appointments in the org.                                         |
| Selected             | Service appointments that the user selected in the appointment list.         |
| Flagged              | Service appointments that the user marked as flagged. Flags aren’t saved when the dispatcher console is reloaded. |
| Recent               | Service appointments that were recently interacted with via scheduling, dragging, Chatter posts, status changes, the Get Candidates action, the Show on Gantt action, and the Open Details action.  
  
  **Note:** Recent service appointments aren’t saved when the dispatcher console is reloaded. |
| Unscheduled          | Service appointments that don’t have an assigned resource and aren’t canceled. |
| Rules Violating      | Service appointments that have rule violations and aren’t canceled.        |
| In Jeopardy          | Service appointments that are marked In Jeopardy and aren’t canceled.       |
| Scheduled            | Service appointments with an assigned resource.                              |
Filter Name | Definition
---|---
Gantt | Service appointments that are currently shown on the Gantt, which means they have one or more assigned resources and fall within the defined time frame.
Contractors | Service appointments that are scheduled to capacity-based resources.
Canceled | Service appointments whose status category is Canceled.

Tip:
- Create custom filters for the appointment list.
- To filter the appointment list by territory, click the gear icon in the appointment list and select Territory filtering.

Mass-Edit Appointments
To modify multiple appointments in the appointment list, select the desired appointments. Then, open the Actions menu and select an action:

<table>
<thead>
<tr>
<th>Action</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>Execute an automatic scheduling process for the selected appointments.</td>
</tr>
<tr>
<td>Dispatch</td>
<td>Dispatch the selected appointments.</td>
</tr>
<tr>
<td>Flag / Unflag</td>
<td>Add or remove a flag for the selected appointments. You can use the flag for filtering later.</td>
</tr>
<tr>
<td>Check Rules</td>
<td>Initiate a rule validation check for the selected appointments.</td>
</tr>
<tr>
<td>Unschedule</td>
<td>Unschedule the selected appointments, or define the relevant time range and service territories of the appointments that must be unscheduled.</td>
</tr>
<tr>
<td>Optimize</td>
<td>Optimize the selected appointments. You’re given the option to select a scheduling policy and filter the selected appointments before running the optimization.</td>
</tr>
</tbody>
</table>

To customize the list of actions, from the App Launcher, find and open the Field Service Admin app. Click Field Service Settings > Dispatcher Console UI > Gantt Configurations, and scroll to the section where you can reorder, add, or remove actions.

Tip: To limit dispatchers’ mass-edit options, remove the Bulk Dispatch, Bulk Optimize, Bulk Schedule, or Bulk Unschedule custom permissions from their user profiles.

If you create custom dispatcher console actions in the Service List category, those actions appear below the built-in actions in the action list.
Customize the Appointment List

Field sets control the fields and field order of the appointment list layout. For help, see Customize the Dispatcher Console with Field Sets.

To use background shading in the appointment list, click the gear icon in the top-right corner and select Dispatch Console Settings. In the Appointment List Color-Coding field, select an option:

<table>
<thead>
<tr>
<th>Color-Coding Setting</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default</td>
<td>Apply a white background to appointments in the list</td>
</tr>
<tr>
<td>Full Shading</td>
<td>Apply a flat background color</td>
</tr>
<tr>
<td>Horizontal Gradient</td>
<td>Apply a gradient background color</td>
</tr>
</tbody>
</table>

Note:
- By default, an appointment’s color on the Gantt and appointment list is based on its status. However, Gantt palettes and the Gantt Color field on service appointments override the default color scheme.
- Regardless of the appointment list color-coding setting, appointments with rule violations are highlighted in the appointment list in yellow and in-jeopardy appointments are highlighted in red.

Highlight Filtered Appointments on the Gantt

Quickly spot the appointments shown in the appointment list on the Gantt. Select an appointment list filter or enter a search term, and then click Highlight in the appointment list. All appointments and absences not shown in the list appear faded on the Gantt. Click the X icon to remove the highlighting.
Work in the Dispatcher Console Gantt

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

This is a Field Service managed package feature.

IN THIS SECTION:

Filter the Gantt
Customize the Gantt’s contents by filtering it based on service resource settings, skills, utilization, hours, and other features.

Filter the Gantt by Service Territory
The Gantt territory filter controls which appointments are shown in the Gantt and appointment list. In a field service operation with numerous service territories, the faster you can control which territories are shown, the better!

Gantt Keyboard Shortcuts
Use keyboard shortcuts to work faster in the dispatcher console.

View Resource Utilization
To make smarter scheduling and hiring decisions, view your service resources’ individual utilization percentages. You can see each resource’s utilization percentage for a particular day or over multiple days, and sort resources in the Gantt by utilization.

Color-Code the Gantt
Help dispatchers compare service appointments in the dispatcher console Gantt and map at a glance by creating custom color palettes based on a service appointment field. For example, create a palette that displays appointments in a custom color spectrum based on the proximity of the due date.

View Service Crews on the Gantt
Control how service crews are displayed on the Gantt in the Field Service dispatcher console.

View Resource Absences on the Gantt and Map
To make things easier for your dispatchers, hide unapproved absences on the Gantt and show resource absences on the dispatcher console map.

View Appointment KPIs on the Gantt
Assess the health of your field service operation at a glance with the help of the Gantt KPI (Key Performance Indicator) bar.

Check Rule Violations on the Gantt
Rule violations occur when a service appointment doesn’t follow predefined scheduling rules. Examples of rule violations include travel time conflicts and appointments that aren’t scheduled between their Earliest Start Permitted and Due Date.

Turn On Gantt Live Updates
Choose to have the Gantt auto-refresh at a specified frequency so dispatchers don’t have to rely on timed updates. Gantt Live Updates relies on the Salesforce Streaming API.
Filter the Gantt

Customize the Gantt’s contents by filtering it based on service resource settings, skills, utilization, hours, and other features.

⚠️ This is a Field Service managed package feature.

To open your filter settings, click the filter icon in the top left-hand corner of the Gantt. By default, the Gantt is sorted by service resource name.

<table>
<thead>
<tr>
<th>Filter Tab</th>
<th>Description</th>
</tr>
</thead>
</table>
| Hours      | Select a range of hours to show. The date resolution determines the Gantt time interval and how available hours appear. For example, when you select a date resolution of 3 Days, the Gantt shows resource availability across 4-hour intervals; it displays intervals with full or partial availability that are within filtered hours. For In-Day, the Gantt shows half-hour intervals and ignores the filter for which hours to show.

You can turn on options to display or highlight weekends. For views that are less than weekly, the Gantt always shows weekend days. When you turn on the option to show weekends, the Gantt displays weekend days for date resolutions of weekly or longer.

⚠️ **Note:** A setting in Field Service Settings > Dispatcher Console UI lets you configure Sunday or Monday as the start of the week.

At the bottom of the tab, you can customize the Long-Term view:

- Choose whether to show only multiday appointments
- Enter the number of months to display (up to 6)
- Hide appointments and absences under a certain length
<table>
<thead>
<tr>
<th>Filter Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>(To reach the long-term view, select Long-Term in the top-right corner of the Gantt. You need the Longterm View custom permission to access it.)</td>
<td></td>
</tr>
<tr>
<td>Resources</td>
<td>Specify which service resources are shown and in what order. Select Show working resources only in the filter box to show only resources that are assigned to appointments in the dates shown on the Gantt. To add more filterable fields to the Resources tab, update the Resource Gantt Filter field set.</td>
</tr>
<tr>
<td>Skills</td>
<td>Select skills that resources must possess to be shown on the Gantt. Change the Filter Logic to OR to display resources with one or more of the selected skills. The Skills filter supports up to 2,000 skills. <strong>Note:</strong> When the Gantt’s resource skill filter runs, only 50 skills are considered for each service resource. This means that service resources with more than 50 skills may not appear when you filter for a skill that they possess. This limit applies only to the Gantt resource skill filter; the Candidates action finds all resources with the skills you need. The Skills filter resets when you refresh the dispatcher console.</td>
</tr>
<tr>
<td>Utilization</td>
<td>Select the factors that are considered when calculating resource utilization, and control the days shown in the utilization view. (To reach the utilization view, select Utilization in the top-right corner of the Gantt.)</td>
</tr>
<tr>
<td>Palettes</td>
<td>Create, manage, and apply palettes to color-code service appointments on the Gantt and map. Click the icon in the top-right corner to open the palette editor.</td>
</tr>
</tbody>
</table>

**Filter the Gantt by Service Territory**

The Gantt territory filter controls which appointments are shown in the Gantt and appointment list. In a field service operation with numerous service territories, the faster you can control which territories are shown, the better! **This is a Field Service managed package feature.**

To filter the Gantt by service territory, click the territory filtering icon at the top of the appointment list.

Then, select territories whose service resources and service appointments you want to see.

- Optionally, select **Show service appointments not associated with a territory**. These appointments can then be scheduled within any of the selected service territories.
- If your organization contains many territories, click the star next to a frequently used service territory to add it to your favorites. Click the Favorites tab to view your favorites.
Hover over a territory and click **Switch** to deselect all territories and select only that territory.

Click **Save** to apply the filter and return to the appointment list.

**Note:** Service territories without assigned resources are shown on the appointment list but not on the Gantt. If you have access to 2,000 or more service territories, the appointment list shows only selected territories. Use the search bar to find territories that aren’t selected.

**View Secondary Service Territory Memberships on the Gantt**

If service resources are assigned to more than one territory, you can choose to show secondary service territory memberships on the Gantt.

1. From the App Launcher, find and open the **Field Service Admin** app, and then click the **Field Service Settings** tab.
2. Click **Dispatcher Console UI > Gantt Configurations**.
3. Select **Show secondary Service Territory Members on Gantt chart**, and save your changes.
4. From Setup, enter **Permission Sets** in the Quick Find box. Select **Permission Sets** under Users.
5. Click **Field Service Dispatcher Permissions**.
6. In the Apps section, click **Custom Permissions**.
7. Click **Edit**.
8. Add the **FSL.View Resource on secondary STM** custom permission to the Field Service Dispatcher permission set.
9. Click **Save**.

If you show secondary territory memberships on the Gantt, keep these considerations in mind:

- When the Candidates action is used, secondary territory members are flagged with a green icon.
- When service appointments are dragged onto the Gantt, the time slots are filled on both of the service resource's rows.
- Territory utilization calculation doesn’t consider secondary territory members.
- When Gantt visibility is back on time zones, only secondary territory memberships with the same time zone are visible. If the primary territory is filtered out, the secondary territory memberships are still visible.

**Gantt Keyboard Shortcuts**

Use keyboard shortcuts to work faster in the dispatcher console.

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
<th>Keybord Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flag or unflag a service appointment</td>
<td>Flagged appointments appear with a flag icon on the Gantt.</td>
<td>Select service appointment, then F</td>
</tr>
<tr>
<td>Open parent work order or work order line item record</td>
<td>Opens the record in the Work Orders tab, outside of the Gantt.</td>
<td>Select service appointment, then W</td>
</tr>
<tr>
<td>Open service appointment record</td>
<td>Opens the record in the Service Appointments tab, outside of the Gantt.</td>
<td>Select service appointment, then S</td>
</tr>
<tr>
<td><strong>Command</strong></td>
<td><strong>Description</strong></td>
<td><strong>Keyboard Shortcut</strong></td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Open service appointment details</td>
<td>Opens a lightbox over the Gantt with tabs containing details about the appointment and its parent record, related records, map, and more.</td>
<td>Select service appointment, then Enter</td>
</tr>
<tr>
<td>Close service appointment lightbox</td>
<td>Closes the lightbox.</td>
<td>Esc</td>
</tr>
</tbody>
</table>
| Move a scheduled service appointment to a new spot in the schedule, allowing for travel time | You can drag an appointment to a different spot in its assigned resource’s schedule or to another resource’s row to reassign it. When an appointment is dragged, it snaps to the closest valid time slot based on your Gantt drag jump setting and on the calculated travel time between adjacent appointments or absences. Configure your drag jump setting in the Field Service Admin app ([Field Service Settings > Dispatcher Console UI](#)). | Windows: Select service appointment+Ctrl+drag  
macOS: Select service appointment+Cmd+drag |
| Show today on the Gantt | If the Gantt is configured to show multiple days, today is the first day shown. | T |
| Switch to In Day view | Changes the Gantt resolution to In Day. | 0 (zero) |
| Switch to Daily view | Changes the Gantt resolution to Daily. | 1 |
| Switch to 2 Days view | Changes the Gantt resolution to 2 Days. | 2 |
| Switch to 3 Days view | Changes the Gantt resolution to 3 Days. | 3 |
| Switch to Weekly view | Changes the Gantt resolution to Weekly. | 7 |
| Switch to Multiday view | Changes the Gantt resolution to Multiday. | M |
| Switch to Utilization view | Changes the Gantt resolution to Utilization. | U |
| Scroll one day back | For example, if you’re viewing the August 6 schedule, this shortcut switches the Gantt to August 5. | Left Arrow |
| Scroll one day forward | For example, if you’re viewing the August 6 schedule, this shortcut switches the Gantt to August 7. | Right Arrow |
| Scroll one time period back | For example, if you’re in the Weekly view, this shortcut switches the Gantt to the previous week. | Shift+Left Arrow |
| Scroll one time period forward | For example, if you’re in the 2 Days view, this shortcut switches the Gantt to the next two days. | Shift+Right Arrow |
| Scroll up in schedule | Scrolls up one row in the Gantt without changing the dates shown. | Up Arrow |
View Resource Utilization

To make smarter scheduling and hiring decisions, view your service resources’ individual utilization percentages. You can see each resource’s utilization percentage for a particular day or over multiple days, and sort resources in the Gantt by utilization.

This is a Field Service managed package feature.

A service resource’s utilization is calculated by comparing their total operating hours to the number of hours they’re scheduled to work. Utilization is calculated only for non-capacity-based service resources.

Calculate Utilization

To determine which factors are considered when calculating a resource’s utilization, click the Gantt filter icon and click the Utilization tab. Deselect factors that you don’t want to be used in the calculation.

When all factors are selected, utilization is calculated using the following equation: 

\[
\text{Utilization} = \frac{SA + Absences + Breaks + Travel Time}{Overtime Hours + Normal Hours}
\]

- \(SA\) = Scheduled service appointments
- Absences = Resource absences of type Absence
- Breaks = Resource absences of type Break
- Overtime Hours = Time slots of type Extended in the resource’s operating hours for its primary service territory
- Normal Hours = Time slots of type Normal in the resource’s operating hours for its primary service territory

For example, if a resource’s operating hours add up to 20 hours per week and they’re scheduled to work 10 hours in a particular week, their average utilization for the week is 50%.

View Utilization on the Gantt

The Gantt provides a bird’s-eye view of your team’s utilization percentages. To turn on the utilization view, select Utilization in the Gantt resolution field in the top-right corner.
From the utilization resource view, you can:

- View each resource’s average utilization over the days in the utilization view
- View a resource’s utilization for a particular day
- Click an event name to view its details
- Flag service appointments
- Click the date on the vertical axis to switch to the date’s daily view

Note: Resource absence duration (in a day) longer than the overall working day capacity is shown as 100% utilization.

Here’s how to customize the utilization display settings.

**Change the number of days in the utilization view**

The utilization view can show 1–31 days. To switch from the default of 31 days, click the Gantt filter icon, then click **Utilization** and enter your preferred number of days (1). Each resource’s Average Utilization (2), shown beneath their name in the resource list, is an average of their daily utilization percentage across the days shown in the utilization view.

**Sort the resource list by average utilization**

Sorting resources by their average utilization helps you identify which resources need more or fewer appointments. Click the Gantt filter icon, then click **Resources**. In the Sort by field, select **Average Utilization**.

**Customize the utilization-based color code**

Resources in the resource list are shown in green, yellow, or red depending on their utilization percentage. To define the limits for these three colors, from the App Launcher, find and open the **Field Service Admin** app. Click **Field Service Settings > Dispatcher Console UI > Gantt Configurations**. Under **Utilization Views**, enter the number of hours that indicate High Utilization (default: 150), Medium Utilization (default: 100), and Extensive Travel (default: 33). In the utilization view:

- Resources whose schedules are below Medium Utilization appear in green.
- Resources whose schedules are between High and Medium Utilization appear in yellow.
- Resources whose schedules are above High Utilization appear in red.
- Resources whose percentage of travel is larger than the value you specify are considered Extensive Travel candidates, and appear with an automobile icon.

**Show each territory’s average daily utilization**

Control when utilization information is shown for territories on the Gantt. From the App Launcher, find and open the **Field Service Admin** app, and then click **Field Service Settings > Dispatcher Console UI > Gantt Configurations**. Select **Show utilization**.
on the Gantt to show each territory’s average daily utilization on the Gantt for all Gantt resolutions. If this option isn’t selected, utilization information is shown only when the Gantt resolution is set to Utilization.

If a service resource is capacity-based with a defined capacity, their utilization percentage isn’t shown in the Gantt. However, their row in the Gantt displays an icon that shows how close they’re to reaching their capacity.

Color-Code the Gantt

Help dispatchers compare service appointments in the dispatcher console Gantt and map at a glance by creating custom color palettes based on a service appointment field. For example, create a palette that displays appointments in a custom color spectrum based on the proximity of the due date.

This is a Field Service managed package feature.

You can base a palette on any service appointment field of the following types: checkbox, picklist, date, date-time, number, percent, or currency. Use the Due Date Approaching palette to color-code appointments based on how close they are to the due date. Create and manage palettes directly from the Gantt.

1. From the App Launcher, find and open the Field Service app. Click the Field Service tab to open the dispatcher console.
2. Click the filter icon at the top of the Gantt, and then click the Palettes tab.
3. Click the icon in the top-right corner to open the palette editor, and click New Palette.
4. Enter a name and description.
5. Select which service appointment field to base the palette on.
6. Define the color spectrum. We recommend creating a high-contrast spectrum to accommodate color-blind users.
   - For picklist fields, assign a color to each picklist value.
   - For checkbox fields, select two colors signifying checked and unchecked.
   - For numeric or date-based fields, choose how many colors to use, a minimum and maximum color, a color if no value is specified, and a corresponding minimum and maximum value. The palette editor then creates a spectrum for you.
7. Select Active to make the palette available to dispatchers.
8. Save your palette.
9. Apply a palette from the Palettes tab in the Gantt filter.
   a. Select a palette in the dropdown list, and click Apply Palette. The list shows the 10 last modified active palettes in the org. Applying a palette changes the background color of appointments on the Gantt and adds an appropriately colored horizontal bar above appointments on the map.
   b. After a palette is applied, you can click Use Default Palette to return to the default color scheme.
The default color scheme—used when no palette is applied—color-codes appointments by status. You can’t update the default color scheme or replace it with a custom palette. Reloading the Gantt or changing which service appointments are shown in the appointment list reverts it to the default color scheme.

The Gantt Color field on service appointments and service crews overrides the default color scheme. If you don’t like the default color scheme, create a process in Process Builder that populates the Gantt Color field based on your preferred service appointment field.

Users with the Gantt Palettes View permission can see all palettes created in your org. To control palette access, set sharing on the Gantt Palette object to Private. Then, use sharing rules to share each palette with the appropriate users.

⚠️ **Tip**: Create multiple palettes to address different scheduling questions. For example, use custom fields to create palettes that do the following:
- Highlight appointments for VIP customers
- Color-code appointments based on service cost
- Color-code appointments based on the priority level of their parent work order

### View Service Crews on the Gantt

Control how service crews are displayed on the Gantt in the Field Service dispatcher console.

⚠️ *This is a Field Service managed package feature.*

#### Show One Crew

In the resource list, click **Show Crew** on a service resource of type Crew to leave only the Crew and its members on the Gantt and hide other resources. Click **Hide Crew View** to return to the regular display.
The Gantt displays each service crew member’s Gantt Label value. If the field is blank on a service crew member record, it defaults to the service crew name + “Crew Member.” For example, Alpha Team Crew Member.

Show or Hide Crews

To customize the way crews are shown on the Gantt, click the Gantt filter icon. Click the Resources tab, and then select one of the following values in the Crews filtering field.

- **Show all:** Do not filter based on crew properties.
- **Hide Service Crew Members:** Show only service resources of type Crew and service resources of type Technician who are not allocated to crews in the time frame open on the Gantt.
- **Show Crews and their Service Crew Members:** Show only service resources of type Crew and service resources of type Technician who are allocated to those crews in the time frame open on the Gantt.
- **Show only Crews:** Show only service resources of type Crew.
- **Hide Crews and Service Crew Members:** Show only service resources of type Technician that are not allocated to a crew in the time frame open on the Gantt.

Customize Crew Color

Optionally, display a service crew in a particular color on the Gantt by entering a hex code in the Gantt Color field on the crew. For example, set the Gantt color to green (#008000) for all service crews that use a company vehicle. Crews without a defined Gantt color appear in purple.

Here, we’ve entered #ff0000 in the Gantt Color field for the Vipers crew, and haven’t specified a color for the Diamondbacks crew.
View Resource Absences on the Gantt and Map

To make things easier for your dispatchers, hide unapproved absences on the Gantt and show resource absences on the dispatcher console map.

 Nowadays, if the Multiday view is selected, resource absences don’t appear on the Gantt.

1. Hide unapproved absences on the Gantt.

   When approval confirmation is enabled, only approved absences can block a mobile worker’s availability and appear on the Gantt. Unapproved absences aren’t considered in scheduling or shown on the Gantt.

   Note: If the Multiday view is selected, resource absences don’t appear on the Gantt.

   a. Create an approval process for absences that checks the FSL__Approved__c field.

   b. To avoid confusion, approve all existing absences.

   c. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.

   d. Click Scheduling > General Logic and select Activate approval confirmation on resource absences.

   e. Save your changes.

2. Show resource absences on the map.

   Absences are shown on the dispatcher console map with a purple icon and the planned route to and from the absence address. If this option isn’t selected, absence length is added to the travel time of adjacent service appointments, which can be confusing for dispatchers.
Note: A resource absence must be properly geocoded by data integration rules—meaning it needs a latitude and longitude—to appear on the map.

a. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.

b. Click Dispatcher Console UI > Gantt Configurations and select Show absences on resource map.

3. Save your changes.

View Appointment KPIs on the Gantt

Assess the health of your field service operation at a glance with the help of the Gantt KPI (Key Performance Indicator) bar.

This is a Field Service managed package feature.

The KPI bar includes five indicators and can be found in the top-right corner of the Gantt.

The indicators are, from left to right:

- Total scheduled time (workload) of all loaded service territories
- Average travel time per service appointment of all service appointments shown on the Gantt
• Number of completed service appointments out of all service appointments shown on the Gantt
• Number of service appointments on the Gantt with rule violations
• Number of service appointments on the Gantt that are In Jeopardy

Check Rule Violations on the Gantt

Rule violations occur when a service appointment doesn’t follow predefined scheduling rules. Examples of rule violations include travel time conflicts and appointments that aren’t scheduled between their Earliest Start Permitted and Due Date.

⚠️ This is a Field Service managed package feature.

Right-click one or more appointments on the Gantt chart or list and click **Check Rules** to manually check rule violations for selected service appointments. To manually check rules on demand for all loaded services on the Gantt, click **Check Rules** next to the scheduling policy.

The scheduling policy selected at the top of the appointment list controls which rules are applied. If a rule violation occurs, the service appointment appears on the Gantt with a yellow triangle. Hover over the appointment to view its details and violated rules.
Note: Up to 30 bulk check rules can be validated, where each bulk check rule consists of either 200 service appointments or 40 service resources over 7 days. If you exceed the maximum number of times you can check rules, some of your services aren’t validated. To avoid reaching this limitation, load a shorter horizon or fewer territories.

Note: Too many work rules in a scheduling policy can result in an Apex CPU timeout when checking rules for a large number of service appointments. If you experience a timeout when checking rules, try removing some work rules, or check rules for fewer service appointments.

When automatic scheduling is used—with the Schedule or Candidates action—rule violations don’t occur. Field Service automatically formulates schedules that don’t violate rules, so rule violations occur only as a result of manual scheduling.

Turn On Gantt Live Updates

Choose to have the Gantt auto-refresh at a specified frequency so dispatchers don’t have to rely on timed updates. Gantt Live Updates relies on the Salesforce Streaming API.

This is a Field Service managed package feature.

Important: Gantt Live Updates has the following limitations:

- Dispatchers without the Streaming API custom permission get timed updates on the Gantt, as defined in your settings.
- Live updates aren’t available to Experience Builder site dispatchers.
- Gantt Live Update access isn’t automatically available to all admins, and too many live update requests can cause the Gantt to crash.
- Gantt Live Updates are subject to org limits for event delivery and PushTopic Streaming Allocations.

1. Update sharing settings so dispatchers receive notifications only about the data they have access to.
   a. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
   b. Click Dispatcher Console UI > Updating the Gantt.
c. Under Live Updates, check that each object’s sharing setting is Private. If not, update the object’s sharing setting to Private in Salesforce Setup.

2. On the same **Updating the Gantt** page, click **Update push topics**. Push topics are used to send event notifications on specified objects, fields, and criteria. Field Service creates push topics for the following objects.
   - Service resource
   - Resource absence
   - Service appointment
   - Assigned resource
   - Service resource capacity
   - Field Service operation
   - Optimization request

3. Select **Gantt updates are enabled org wide**.
4. Select **Allow admins to use Gantt updates**.
5. Save your changes.

### Work in the Dispatcher Console Map

The dispatcher console map gives dispatchers a dynamic bird’s-eye view of their mobile workforce. Learn how to customize the map view and draw territories directly on the map.

**This is a Field Service managed package feature.**

**Note:** Because Google Maps is restricted in China, Field Service features that depend on Google Maps don’t work there. To minimize errors and customize access for users in China, see [Disable Google Maps-based Field Service features for China users](#).

#### IN THIS SECTION:

- **Customize the Map**
  Control the information shown on the dispatcher console map. By default, the map shows markers for all service resources whose appointments are loaded in the Gantt or appointment list.

- **Customize Icons and Colors for Reports**
  Give your reports contrast on the Gantt map by customizing their icons and colors. You can map any tabular report that has geolocation fields.

- **Enable Map Polygons**
  Set up and configure map polygons so you can draw your own territories directly on the map.

- **Create and Manage Map Polygons**
  Draw your own territories directly on the map, then link them to your service territories. Polygons make it easy to mass-update all appointments within a specific geographic area.

- **Import Service Territory Polygons in KML**
  Map polygons represent the physical boundaries of a service territory in Field Service. While you can draw a polygon on the dispatcher console map, you can also import one in KML (Keyhole Markup Language). For example, cities may provide public KML files so you can create service territories whose boundaries correspond exactly to the city borders.
Customize the Map

Control the information shown on the dispatcher console map. By default, the map shows markers for all service resources whose appointments are loaded in the Gantt or appointment list.

This is a Field Service managed package feature.

To navigate to the dispatcher console map, from the App Launcher, find and open the Field Service app, and then click Field Service. Then, click the Map tab. To pop out the map and drag it anywhere within the dispatcher console, hover over the Map tab from the Gantt and click .

Note: The dispatcher console map may appear different than the map displayed on service territory member detail pages because of a difference in geocoding granularity. As a rule, the dispatcher console map is more accurate.

Choose What Information is Shown

Click Map Layers, which opens on the Markers tab. Select the information to display for selected service resources:

- **Live Positions**: When a service resource updates a service appointment’s status from their mobile device, their coordinates are automatically recorded. Live Position shows the latest coordinates saved in the system.
- **Homebase**: The selected service resource’s home base, set on their detail page.
- **Service Appointments**: All service appointments that are assigned to the selected service resource and shown in the appointment list.
- **Service Territories**: The resource’s service territories.
Choose Which Service Resources are Shown

Click Map Layers, then click the Service Resources tab. Use the search to select one or more service resources whose information you want displayed on the map.

Display Report Data

Click Map Layers, then click the Reports tab. Select reports containing geolocation fields that you want to be displayed on the map. This way, you can view location-based standard or custom objects as separate map layers.

Only tabular reports in the Field Service Reports folder appear in the Reports tab. By default, the markers’ icons on the map are styled as the object type in the first column in the report. Up to 10 additional columns are visible inside the marker’s info window.

Up to 500 total report markers can be displayed on the Gantt map at one time. If a report has more than 500 markers, consider adding more filters.

Manage Map Polygons

Click Map Layers, then click the Polygons tab. Choose which polygons are displayed, customize their color-coding, and create new polygons. You can also create and manage polygons from the Map Polygons tab in your Salesforce environment.

View Traffic Conditions

Click Traffic at the top of the map to show traffic conditions.

Customize Icons and Colors for Reports

Give your reports contrast on the Gantt map by customizing their icons and colors. You can map any tabular report that has geolocation fields.

This is a Field Service managed package feature.

1. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
2. Click Dispatcher Console UI > Map. Under Report Styles, select a report.
3. Select a color and an icon for the report, then click Add Report.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

USER PERMISSIONS

To configure the Field Service managed package:

- Customize Application

To customize icons and colors for reports:

- Custom permission set: FSL Admin Permissions
4. Click **Save**.

5. From the App Launcher, find and open the **Field Service** app. To open the dispatcher console, click the **Field Service** tab.

6. Click **Map > Map Layers > Reports**.

7. Select a report and click **Add Layer**.

If you decide not to use customized icons and colors for your reports, they are mapped using the default style for that object type.
Enable Map Polygons

Set up and configure map polygons so you can draw your own territories directly on the map.

This is a Field Service managed package feature.

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets under Users.
2. Click Field Service Dispatcher Permissions.
3. In the Apps section, click Custom Permissions.
4. Click Edit.
5. Add the following available custom permissions to the enabled custom permissions.
   - FSL.Polygons - create/update
   - FSL.Polygons - view
6. Click Save.
   Tip: To give access to a selection of your users, create custom permission sets and assign these permissions to those users.
7. Create a tab for the Map Polygon custom object.
8. From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab.
9. Click Service Appointment Life Cycle > Creation.
10. Select Use polygons to assign service territories.
11. Set the territory classification policy to Highest.

When there are parent-child relationships between service territories (for example, San Francisco and California), the service appointment is assigned to the highest territory in the hierarchy (California). Select Lower if you want appointments to be assigned to the lowest territory (San Francisco). Service appointments are never assigned to middle-tier territories.

Create and Manage Map Polygons

Draw your own territories directly on the map, then link them to your service territories. Polygons make it easy to mass-update all appointments within a specific geographic area.

This is a Field Service managed package feature.

Create and Update Polygons

After map polygons are enabled, you can draw polygons straight on the dispatcher console map or import them in KML (Keyhole Markup Language) format.

1. To open the dispatcher console, from the App Launcher, find and open the Field Service app, and then click Field Service.
2. Click the Map tab, and then click Map Layers.
3. Select Polygons.
4. Click New.
5. Name your polygon and select a color.
6. Select a service territory.

   **Note:** The service territory field is used during appointment scheduling. When a new service appointment is created, the Service Territory field auto-populates based on the appointment’s address. When a service appointment address changes and its Service Territory field is empty, the address is matched to a polygon and that polygon’s territory.

7. Draw your polygon on the map.

8. Click **Save**.

To import a polygon in KML—for example, a public KML file for a county or city—click the Map Polygons custom object tab in Salesforce and click **New**. Add a name, color, description, and service territory. In the KML Details field, add your KML text.

Update polygons from the Map Polygons tab or the Polygons map layer.

### Take Mass Actions on Polygons

From the dispatcher console map view, you can mass-edit all service appointments within a polygon. Right-click a polygon and select one of the following actions.

- **Schedule / Unschedule / Dispatch**: Schedule, unschedule, or dispatch all service appointments within the polygon in the current view.
- **In Jeopardy**: Set the In Jeopardy field to True for every service appointment within the polygon.
- **Delete Polygon**: Delete the polygon.
- **Cut Intersections**: Select a polygon and cut its intersections with other polygons. Select multiple polygons, then click **Go** to trim the polygons so they no longer intersect.

**Tip:** Create custom actions to add to the actions list on polygons. For details, see [Create Custom Actions for the Dispatcher Console](#).

### Limits and Considerations

- A polygon can contain up to 3,200 coordinates.
- If your org contains more than 200 polygons, you may experience dispatcher console performance issues. To avoid these issues, set the sharing of the Map Polygon object to **Private** and use sharing to expose only the relevant polygons to dispatchers.
- If a service appointment’s geolocation matches more than one polygon, the appointment is assigned to either the highest or lowest-level territory in the hierarchy depending on your settings.
- When creating polygons, don’t create overlaps unless there are parent-child relationships between the corresponding service territories (for instance, San Francisco and California). Service appointments are never assigned to middle-tier territories.
- If two or more polygons overlap and there’s no hierarchy in place, service appointments are assigned to the first polygon that was created.
Import Service Territory Polygons in KML

Map polygons represent the physical boundaries of a service territory in Field Service. While you can draw a polygon on the dispatcher console map, you can also import one in KML (Keyhole Markup Language). For example, cities may provide public KML files so you can create service territories whose boundaries correspond exactly to the city borders.

This is a Field Service managed package feature.

To import a polygon in KML, click the Map Polygons custom object tab in Salesforce and click New. Add a name, color, description, and service territory. In the KML Details field, add your KML text. Make sure that each set of coordinates has its own line.

Example:

```xml
<?xml version="1.0" encoding="UTF-8"?>
<kml xmlns="http://www.opengis.net/kml/2.2">
<Style id="myPolygonStyle">
  <LineStyle>
    <width>1</width>
  </LineStyle>
  <PolyStyle>
    <color>8047A043</color>
  </PolyStyle>
</Style>
<Placemark>
  <name>myPolygon</name>
  <styleUrl>#myPolygonStyle</styleUrl>
  <Polygon>
    <outerBoundaryIs>
      <LinearRing>
        <coordinates>-122.44257817993167,37.80710430993863,0
-122.4278153015137,37.804391739106606,0
-122.4113358093262,37.80737556154185,0
-122.40412603149417,37.80629054915071,0
-122.38867650756839,37.78974213500372,0
-122.38764653930667,37.74821914921608,0
-122.45390783081058,37.74523293816564,0
-122.4604309631348,37.78865686357955,0
-122.44257817993167,37.80710430993863,0</coordinates>
      </LinearRing>
    </outerBoundaryIs>
  </Polygon>
</Placemark>
</kml>
```
Field Service Object Fields

Learn about the fields available on Field Service standard objects.

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

IN THIS SECTION:

Field Service Objects
When you enable Field Service, you gain access to a suite of standard Salesforce objects. The Field Service managed package also includes custom objects that support its scheduling and optimization features.

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

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

Maintenance Plan Fields
Maintenance plans, maintenance assets, and maintenance work rules have the following fields. Sometimes you can’t see or edit certain fields because of your page layout and field-level security settings.

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

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

Product Item and Inventory Fields
Product items, product item transactions, products required, and products consumed have the following fields. Sometimes you can’t see or edit certain fields because of your page layout and field-level security settings.

Return Order Fields
Return orders and return order line items have the following fields. Sometimes you can’t see or edit certain fields because of your page layout and field-level security settings.

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

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

Service Report Fields
Service reports and digital signatures on service reports have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.
Service Resource Fields for Field Service
Service resources, resource absences, resource capacity records, assigned resources, and resource preferences have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

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

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

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

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

Work Order Fields for Field Service
Work orders have the following fields. Sometimes you can't see or edit certain fields because of your page layout and field-level security settings.

Work Order Line Item Fields for Field Service
Work order line items have the following fields. Sometimes you can't see or edit certain fields because of your page layout and field-level security settings.

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

Field Service Objects
When you enable Field Service, you gain access to a suite of standard Salesforce objects. The Field Service managed package also includes custom objects that support its scheduling and optimization features.

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

Standard Objects

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>An address associated with a location.</td>
</tr>
<tr>
<td>App Extension</td>
<td>A link between the Field Service mobile app and other mobile apps.</td>
</tr>
<tr>
<td>Appointment Bundle Aggregation Duration</td>
<td>Sums the duration of the bundle members, reduced by a predefined percentage.</td>
</tr>
<tr>
<td>Object Name</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Appointment Bundle Aggregation Policy</td>
<td>Policy that defines how the property values of the bundle members are aggregated and assigned to the bundle.</td>
</tr>
<tr>
<td>Appointment Bundle Config</td>
<td>General parameters that define the behavior of the bundle.</td>
</tr>
<tr>
<td>Appointment Bundle Policy</td>
<td>Policy that defines how the bundling of service appointments is handled.</td>
</tr>
<tr>
<td>Appointment Bundle Policy Service Territory</td>
<td>A link between the Bundle Policy and the Service Territory.</td>
</tr>
<tr>
<td>Appointment Bundle Propagation Policy</td>
<td>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.</td>
</tr>
<tr>
<td>Appointment Bundle Restriction Policy</td>
<td>Policy that defines the restrictions that are considered while forming a bundle.</td>
</tr>
<tr>
<td>Appointment Bundle Sort Policy</td>
<td>Policy that defines the properties by which the bundle members are sorted within the bundle. Can also be used in the automated mode for determining the selection order of the bundle members.</td>
</tr>
<tr>
<td>Assigned Resource</td>
<td>A service resource that is assigned to a service appointment.</td>
</tr>
<tr>
<td>Associated Location</td>
<td>A location linked to a specific account.</td>
</tr>
<tr>
<td>Asset Downtime Period</td>
<td>A downtime period associated with an asset.</td>
</tr>
<tr>
<td>Asset Warranty</td>
<td>A warranty term associated with an asset.</td>
</tr>
<tr>
<td>Digital Signature</td>
<td>A captured signature from a field service customer or mobile worker.</td>
</tr>
<tr>
<td>Expense</td>
<td>An expense such as tools or travel costs linked to a work order.</td>
</tr>
<tr>
<td>Expense Report</td>
<td>A report that summarizes expenses.</td>
</tr>
<tr>
<td>Expense Report Entry</td>
<td>An expense that’s included in an expense report.</td>
</tr>
<tr>
<td>Field Service Mobile Settings</td>
<td>A collection of settings related to the Field Service mobile app.</td>
</tr>
<tr>
<td>Job Profile</td>
<td>A set of skills used to match service resources to shifts.</td>
</tr>
<tr>
<td>Linked Article</td>
<td>A knowledge article version that is attached to a work order, work order line item, or work type.</td>
</tr>
<tr>
<td>Location</td>
<td>A warehouse, site, van, or plant, usually where inventory is stored or used.</td>
</tr>
<tr>
<td>Maintenance Asset</td>
<td>An asset associated with a particular maintenance plan. The plan’s work orders list the asset associated with it.</td>
</tr>
<tr>
<td>Maintenance Plan</td>
<td>A plan for preventive maintenance on assets. Work orders are generated for all maintenance visits.</td>
</tr>
<tr>
<td>Maintenance Work Rule</td>
<td>A reoccurring maintenance item.</td>
</tr>
<tr>
<td>Object Name</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Mobile Settings Assignment</td>
<td>The assignment of a field service mobile settings configuration to a user profile.</td>
</tr>
<tr>
<td>Operating Hours</td>
<td>Field service hours that you can define for service territories, service territory members, and accounts.</td>
</tr>
<tr>
<td>Product Consumed</td>
<td>A product from your inventory that was used to complete a work order or work order line item.</td>
</tr>
<tr>
<td>Product Item</td>
<td>A portion of your inventory stored at a particular location. Every product item is linked to a product and a location.</td>
</tr>
<tr>
<td>Product Item Transaction</td>
<td>Represents the restocking, consumption, or stock adjustment of a product item.</td>
</tr>
<tr>
<td>Product Request</td>
<td>A request for inventory.</td>
</tr>
<tr>
<td>Product Request Line Item</td>
<td>A subdivision of a product request, associated with a particular product.</td>
</tr>
<tr>
<td>Product Required</td>
<td>A product that is required for the completion of a work order or work order line item.</td>
</tr>
<tr>
<td>Product Service Campaign</td>
<td>A set of activities to be performed on a product service campaign asset, such as a product recall for safety issues or product defects.</td>
</tr>
<tr>
<td>Product Service Campaign Item</td>
<td>A product service campaign’s asset.</td>
</tr>
<tr>
<td>Product Transfer</td>
<td>The transfer of inventory from one location to another.</td>
</tr>
<tr>
<td>Product Warranty</td>
<td>A warranty term associated with a product.</td>
</tr>
<tr>
<td>Recordset Filter Criteria</td>
<td>A filter that uses field values from a source object to filter records in another object.</td>
</tr>
<tr>
<td>Recordset Filter Criteria Rule</td>
<td>The individual rules that make up a recordset filter criteria. Rules map fields to values.</td>
</tr>
<tr>
<td>Resource Absence</td>
<td>A time period in which a service resource is unavailable to work.</td>
</tr>
<tr>
<td>Resource Preference</td>
<td>The designation of a service resource as preferred, required, or excluded on specific accounts or work orders.</td>
</tr>
<tr>
<td>Return Order</td>
<td>The return or repair of inventory or products.</td>
</tr>
<tr>
<td>Return Order Line Item</td>
<td>A subdivision of a return order.</td>
</tr>
<tr>
<td>Service Appointment</td>
<td>An appointment to perform field service work for customers.</td>
</tr>
<tr>
<td>Service Appointment Status</td>
<td>Corresponds to the Status field on service appointments.</td>
</tr>
<tr>
<td>Service Crew</td>
<td>A group of service resources that can be assigned to field service work as a unit.</td>
</tr>
<tr>
<td>Service Crew Member</td>
<td>A service resource that belongs to a service crew.</td>
</tr>
<tr>
<td>Object Name</td>
<td>Definition</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Service Report</td>
<td>A customer-facing report summarizing the status of a service appointment, work order, or work order line item.</td>
</tr>
<tr>
<td>Service Report Template</td>
<td>A template for service reports.</td>
</tr>
<tr>
<td>Service Resource</td>
<td>A user or crew who can perform field service work. You can assign service resources to service appointments and specify each resource's skills, service territory, and availability.</td>
</tr>
<tr>
<td>Service Resource Capacity</td>
<td>The maximum number of scheduled hours or number of service appointments that a capacity-based service resource can complete within a specific time period.</td>
</tr>
<tr>
<td>Service Resource Skill</td>
<td>A skill assigned to a service resource. You can specify skill level and expiration.</td>
</tr>
<tr>
<td>Service Territory</td>
<td>A region in which field service work is performed. You can assign service resources to territories and create territory hierarchies.</td>
</tr>
<tr>
<td>Service Territory Location</td>
<td>A location associated with a particular service territory.</td>
</tr>
<tr>
<td>Service Territory Member</td>
<td>A service resource who is assigned to a particular service territory.</td>
</tr>
<tr>
<td>Shift</td>
<td>A record used to schedule service resources.</td>
</tr>
<tr>
<td>Shift Pattern</td>
<td>A pattern of shift templates used to define groups of commonly used shifts.</td>
</tr>
<tr>
<td>Shift Pattern Entry</td>
<td>Shift pattern entries link shift templates to a shift pattern.</td>
</tr>
<tr>
<td>Shift Template</td>
<td>A template used to define commonly used shifts.</td>
</tr>
<tr>
<td>Shipment</td>
<td>A shipment of inventory between locations.</td>
</tr>
<tr>
<td>Shipment Item</td>
<td>An item included in a shipment.</td>
</tr>
<tr>
<td>Skill</td>
<td>A certification or area of expertise.</td>
</tr>
<tr>
<td>Skill Requirement</td>
<td>A skill that is required to complete a particular field service task. Skill requirements can be added to work types, work orders, and work order line items.</td>
</tr>
<tr>
<td>Time Sheet</td>
<td>A log of a service resource's time and attendance.</td>
</tr>
<tr>
<td>Time Sheet Entry</td>
<td>A period when a service resource performs a specific function.</td>
</tr>
<tr>
<td>Time Slot</td>
<td>A period in a day when field service work can be performed. Operating hours consist of one or more time slots.</td>
</tr>
<tr>
<td>Warranty Term</td>
<td>Details of the benefits offered under a warranty.</td>
</tr>
<tr>
<td>Work Order</td>
<td>Represents work to be performed for a customer.</td>
</tr>
<tr>
<td>Work Order Line Item</td>
<td>A subtask on a work order.</td>
</tr>
<tr>
<td>Work Order Status</td>
<td>Corresponds to the Status field on work orders.</td>
</tr>
</tbody>
</table>
### Field Service Objects

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Definition</th>
<th>Tab in Salesforce?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Order Line Item Status</td>
<td>Corresponds to the Status field on work order line items.</td>
<td></td>
</tr>
<tr>
<td>Work Type</td>
<td>A template that helps you standardize your work orders.</td>
<td>✓</td>
</tr>
<tr>
<td>Work Type Group</td>
<td>A category of work types that's used to define work-type-based scheduling limits.</td>
<td>✓</td>
</tr>
<tr>
<td>Work Type Group Member</td>
<td>A work type that belongs to a particular work type group.</td>
<td></td>
</tr>
</tbody>
</table>

The following objects are available even if Field Service isn’t enabled. These objects are often used in field service tasks.

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Definition</th>
<th>Tab in Salesforce?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset</td>
<td>A purchased or installed product.</td>
<td>✓</td>
</tr>
<tr>
<td>Asset Relationship</td>
<td>A relationship between two assets that represents a replacement or upgrade.</td>
<td></td>
</tr>
<tr>
<td>Contract Line Item</td>
<td>A subdivision of a service contract, typically representing a product covered by the service contract.</td>
<td></td>
</tr>
<tr>
<td>Entitlement</td>
<td>Represents the level of support that a customer is entitled to.</td>
<td>✓</td>
</tr>
<tr>
<td>Product</td>
<td>A product or service that your business sells.</td>
<td>✓</td>
</tr>
<tr>
<td>Service Contract</td>
<td>Represents a service-level agreement, such as a warranty or subscription.</td>
<td>✓</td>
</tr>
<tr>
<td>Skill</td>
<td>A capability required to perform tasks.</td>
<td>✓</td>
</tr>
<tr>
<td>Work Order</td>
<td>A record that tracks work to be performed for customers. Work orders can have their own service appointments and work order line items.</td>
<td>✓</td>
</tr>
<tr>
<td>Work Order Line Item</td>
<td>A subdivision of a work order, often representing a task to be completed.</td>
<td></td>
</tr>
</tbody>
</table>

### Custom Objects

The following objects are provided by the Field Service managed package. You can view them in Setup and create custom tabs for them. Customize these objects only based on Salesforce recommendations.

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Dependency</td>
<td>A scheduling dependency between two service appointments.</td>
</tr>
<tr>
<td>Crew Management User Settings</td>
<td>A user’s crew management preferences.</td>
</tr>
<tr>
<td>Crew Management User Settings Territory</td>
<td>A user’s crew management preferences for the most recently loaded service territory.</td>
</tr>
<tr>
<td><strong>Object Name</strong></td>
<td><strong>Definition</strong></td>
</tr>
<tr>
<td>-----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Criteria</td>
<td>Custom criteria added to a scheduling recipe.</td>
</tr>
<tr>
<td>FSL Operation</td>
<td>Used in data processing.</td>
</tr>
<tr>
<td>Gantt Filter</td>
<td>A custom filter that controls what data appears in the Gantt.</td>
</tr>
<tr>
<td>Gantt Palette</td>
<td>A palette used to color-code service appointments on the Gantt.</td>
</tr>
<tr>
<td>Map Polygon</td>
<td>A custom polygon, which typically represents a service territory.</td>
</tr>
<tr>
<td>Optimization Data</td>
<td>Schedule optimization data and results.</td>
</tr>
<tr>
<td>Optimization Request</td>
<td>A request to optimize the schedule, created when a scheduled optimization job runs or a user triggers an optimization action.</td>
</tr>
<tr>
<td>Scheduling Policy</td>
<td>A set of work rules and service objectives that guides schedule optimization.</td>
</tr>
<tr>
<td>Scheduling Policy Objective</td>
<td>A service objective assigned to a specific scheduling policy.</td>
</tr>
<tr>
<td>Scheduling Policy Work Rule</td>
<td>A work rule assigned to a specific scheduling policy.</td>
</tr>
<tr>
<td>Scheduling Recipe</td>
<td>A collection of optimization settings that dictate how to address a scheduling event such as an appointment cancellation.</td>
</tr>
<tr>
<td>Service Objective</td>
<td>A scheduling goal in an optimization operation.</td>
</tr>
<tr>
<td>SLR Cache</td>
<td>Cached data used in street-level routing.</td>
</tr>
<tr>
<td>Territory Optimization Request</td>
<td>A schedule optimization request for a specific service territory.</td>
</tr>
<tr>
<td>User Setting</td>
<td>The user’s dispatcher console preferences, such as the last filters used. Don’t customize.</td>
</tr>
<tr>
<td>User Setting Territory</td>
<td>A user’s dispatcher console preferences for the most recently loaded service territory.</td>
</tr>
<tr>
<td>User Territory</td>
<td>A relationship between a user and the service territory that they belong to.</td>
</tr>
<tr>
<td>Work Rule</td>
<td>A rule that narrows the list of candidates for a service appointment.</td>
</tr>
</tbody>
</table>
### Linked Article Fields

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article ID</td>
<td>The ID of the linked article record, which is created when an article is attached to a record.</td>
</tr>
<tr>
<td>Article Title</td>
<td>The title of the attached article.</td>
</tr>
<tr>
<td>Article Version</td>
<td>The version of the article that is attached to the record. This field displays the title of the attached version, and links to the version. It is a required field on linked articles attached to work orders and work order line items. When you attach an article to a record, that version of the article stays associated with the record even if later versions are published. If needed, you can detach and reattach an article to a record to link the latest version. For example, if an article was entitled “How to Replace a Filter” when it was attached to a work order, this field displays that title and links to the attached version.</td>
</tr>
<tr>
<td>Knowledge Article ID</td>
<td>Required. The ID of the article that is attached to the record.</td>
</tr>
<tr>
<td>Last Viewed</td>
<td>The date the article was last viewed.</td>
</tr>
<tr>
<td>Linked Object Type</td>
<td>Read only. The type of record that the article is attached to. For example, if the article is attached to a work order, this field displays “Work Order.”</td>
</tr>
<tr>
<td>Linked Record ID</td>
<td>Required. The ID of the record that the article is attached to. For example, if the article is attached to a work order, this field displays the ID of the work order.</td>
</tr>
<tr>
<td>Record Type ID</td>
<td>The record type of the linked article. This field is populated only if record types are used.</td>
</tr>
</tbody>
</table>
Location Fields for Field Service

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

Location

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Date</td>
<td>Date the location closed or went out of service.</td>
</tr>
<tr>
<td>Construction End Date</td>
<td>Date construction ended at the location.</td>
</tr>
<tr>
<td>Construction Start Date</td>
<td>Date construction began at the location.</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of the location.</td>
</tr>
<tr>
<td>Driving Directions</td>
<td>Directions to the location.</td>
</tr>
<tr>
<td>Inventory Location</td>
<td>Indicates whether the location stores parts.</td>
</tr>
<tr>
<td><strong>Note:</strong> This field must be selected if you want to associate the location with product items.</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>The geographic location.</td>
</tr>
<tr>
<td>Location Level</td>
<td>The location’s position in a location hierarchy.</td>
</tr>
<tr>
<td></td>
<td>If the location has no parent or child locations,</td>
</tr>
<tr>
<td></td>
<td>its level is 1. Locations that belong to a hierarchy</td>
</tr>
<tr>
<td></td>
<td>have a level of 1 for the root location, 2 for the</td>
</tr>
<tr>
<td></td>
<td>child locations of the root location, 3 for their</td>
</tr>
<tr>
<td></td>
<td>children, and so forth.</td>
</tr>
<tr>
<td>Location Name</td>
<td>Location name. For example, Service Van #4.</td>
</tr>
<tr>
<td>Location Type</td>
<td>Picklist of location types, which can be</td>
</tr>
<tr>
<td></td>
<td>customized. By default, no value is selected. The</td>
</tr>
<tr>
<td></td>
<td>available values are:</td>
</tr>
<tr>
<td></td>
<td>• Warehouse</td>
</tr>
<tr>
<td></td>
<td>• Site</td>
</tr>
<tr>
<td></td>
<td>• Van</td>
</tr>
<tr>
<td></td>
<td>• Plant</td>
</tr>
<tr>
<td>Mobile Location</td>
<td>Indicates whether the location moves. For</td>
</tr>
<tr>
<td></td>
<td>example, a truck or tool box.</td>
</tr>
<tr>
<td>Open Date</td>
<td>Date the location opened or came into service.</td>
</tr>
<tr>
<td>Owner Name</td>
<td>The location’s owner or driver.</td>
</tr>
</tbody>
</table>
### Field Service

**Location Fields for Field Service**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Location</td>
<td>The location’s parent location. For example, if vans are stored at a warehouse when not in service, the warehouse is the parent location.</td>
</tr>
<tr>
<td>Possession Date</td>
<td>The date the location was purchased.</td>
</tr>
<tr>
<td>Remodel End Date</td>
<td>Date remodel construction ended at the location.</td>
</tr>
<tr>
<td>Remodel Start Date</td>
<td>Date remodel construction ended at the location.</td>
</tr>
<tr>
<td>Root Location</td>
<td>(Read Only) The top-level location in the location’s hierarchy.</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Picklist of available time zones.</td>
</tr>
<tr>
<td>Visitor Address</td>
<td>Lookup to an account’s or client’s address.</td>
</tr>
</tbody>
</table>

### Address

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>Name for the address.</td>
</tr>
<tr>
<td>Address Type</td>
<td>Picklist of address types. The values are:</td>
</tr>
<tr>
<td></td>
<td>• Mailing</td>
</tr>
<tr>
<td></td>
<td>• Shipping</td>
</tr>
<tr>
<td></td>
<td>• Billing</td>
</tr>
<tr>
<td></td>
<td>• Home</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of the address.</td>
</tr>
<tr>
<td>Driving Directions</td>
<td>Directions to the address.</td>
</tr>
<tr>
<td>Location Type</td>
<td>The type of location associated with the address. The values are:</td>
</tr>
<tr>
<td></td>
<td>• Warehouse (default)</td>
</tr>
<tr>
<td></td>
<td>• Site</td>
</tr>
<tr>
<td></td>
<td>• Van</td>
</tr>
<tr>
<td></td>
<td>• Plant</td>
</tr>
<tr>
<td>Parent</td>
<td>A lookup field to the parent location.</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Picklist of available time zones.</td>
</tr>
</tbody>
</table>

### Associated Location

Associated locations represent a relationship between an account and a location. Multiple accounts can be associated with a location; for example, a shopping mall location might be related to several accounts. They have the following fields.
### Maintenance Plan Fields

Maintenance plans, maintenance assets, and maintenance work rules have the following fields. Sometimes you can’t see or edit certain fields because of your page layout and field-level security settings.

#### Maintenance Plan

Maintenance plans let you define how often maintenance visits occur and mass-generate work orders for future visits. Maintenance plans can be associated with accounts, work types, assets (creating records known as maintenance assets), locations, and service contracts.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>The associated account, which typically represents the customer receiving the maintenance service.</td>
</tr>
<tr>
<td>Auto-generate work orders</td>
<td>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 next suggested maintenance date* listed on each maintenance asset, or on the maintenance plan if no assets are included. If a Generation Horizon is specified, the date of generation is that many days earlier.</td>
</tr>
<tr>
<td>Contact</td>
<td>The associated contact.</td>
</tr>
<tr>
<td>Date of the first work order in the next batch</td>
<td>The suggested date of service for the first work order, not the date the work order is created.</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of the plan.</td>
</tr>
<tr>
<td>End Date</td>
<td>The last day the maintenance plan is valid.</td>
</tr>
<tr>
<td>Frequency</td>
<td>(Required) Amount of time between the plan’s work orders. The unit is specified in the Frequency Type field.</td>
</tr>
<tr>
<td>Frequency Type</td>
<td>(Required) The unit of frequency:</td>
</tr>
<tr>
<td></td>
<td>• Days</td>
</tr>
<tr>
<td></td>
<td>• Weeks</td>
</tr>
<tr>
<td></td>
<td>• Months</td>
</tr>
<tr>
<td></td>
<td>• Years</td>
</tr>
<tr>
<td></td>
<td>For example, to perform monthly maintenance visits you need a work order for each visit, so enter 1 in Frequency and select Months.</td>
</tr>
<tr>
<td>Generate new batch upon completion</td>
<td>If both this option and Auto-generate work orders are selected, 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 causes a staggered generation schedule between maintenance assets.</td>
</tr>
</tbody>
</table>

**Important:** Maintenance assets also list a date of the first work order in the next batch, 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. However, it 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.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generation Horizon (Days)</td>
<td>If <strong>Auto-generate work orders</strong> is selected, the next batch of work orders is generated this number of days before the maintenance plan’s Date of the first work order in the next batch. A generation horizon of 5 means that the new batch of work orders is generated 5 days before the maintenance asset’s or maintenance plan’s next suggested maintenance date*. If there are no assets, the new batch is generated on the next suggested maintenance date*. The generation horizon must be a whole number.</td>
</tr>
<tr>
<td>Generation Timeframe</td>
<td><em>(Required)</em> How far in advance work orders are generated in each batch. The unit is specified in the Generation Timeframe Type field.</td>
</tr>
<tr>
<td>Generation Timeframe Type</td>
<td><em>(Required)</em> The generation timeframe unit:</td>
</tr>
<tr>
<td></td>
<td>• Days</td>
</tr>
<tr>
<td></td>
<td>• Weeks</td>
</tr>
<tr>
<td></td>
<td>• Months</td>
</tr>
<tr>
<td></td>
<td>• Years</td>
</tr>
<tr>
<td>Location</td>
<td>Where the service takes place.</td>
</tr>
<tr>
<td>Maintenance Plan Number</td>
<td><em>(Read Only)</em> An auto-assigned number that identifies the maintenance plan.</td>
</tr>
<tr>
<td>Maintenance Plan Title</td>
<td>A name for the maintenance plan.</td>
</tr>
<tr>
<td>Maintenance Window End (Days)</td>
<td>Days after the suggested service date on the work order that its service appointment can be scheduled.</td>
</tr>
<tr>
<td>Maintenance Window Start (Days)</td>
<td>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 is 3 days before and 3 days after 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.</td>
</tr>
<tr>
<td>Owner</td>
<td>Maintenance plan owner.</td>
</tr>
<tr>
<td>Service Appointment Generation Method</td>
<td>How service appointments are generated when more than one asset is associated with the maintenance plan and work order generation method is <strong>One work order line item per asset</strong>. Choices are one service appointment for the parent work order or one service appointment for each work order line item.</td>
</tr>
</tbody>
</table>
### Field Service  
### Maintenance Plan Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Contract</td>
<td>The service contract associated with the maintenance plan. If any child maintenance asset is associated with a contract line item from the service contract, the service contract can’t be updated.</td>
</tr>
<tr>
<td>Start Date</td>
<td>The first day the maintenance plan is valid.</td>
</tr>
<tr>
<td>Work Order Generation Method</td>
<td>How work orders are generated when more than one asset is associated with the maintenance plan. Choices are one work order for each asset or one parent work order and work order line items for each asset.</td>
</tr>
</tbody>
</table>
| Work Order Generation Status    | (Read Only) Indicates whether work order generation is:  
  • not started  
  • in progress  
  • complete  
  • unsuccessful  
  
  You can generate only one batch at a time.                                                                                                                                 |
| Work Type                       | 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. |

### Maintenance Asset

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset</td>
<td>Asset associated with the maintenance plan.</td>
</tr>
<tr>
<td>Contract Line Item</td>
<td>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.</td>
</tr>
<tr>
<td>Date of the first work order in the next batch</td>
<td>The suggested date of service for the first work order, not the date the work order is created. This date corresponds to the work order’s Suggested Maintenance Date. If left blank when the maintenance asset is created, this field inherits its initial value from the related maintenance plan. It auto-updates after each batch is generated.</td>
</tr>
<tr>
<td>Maintenance Asset Number</td>
<td>(Read Only) An auto-assigned number that identifies the maintenance asset.</td>
</tr>
<tr>
<td>Maintenance Plan</td>
<td>Maintenance plan associated with the maintenance asset.</td>
</tr>
</tbody>
</table>
### Maintenance Plan Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Type</td>
<td>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.</td>
</tr>
</tbody>
</table>

### Maintenance Work Rule

A maintenance work rule is associated with a maintenance plan or maintenance asset and defines the frequency at which a maintenance task is performed on the asset. An asset can have multiple maintenance work rules.

**Note:** If you encounter problems with text wrapping in Recurrence Pattern, update your Density Setting from Compact view to Comfy view. Tell me more.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of the first work order in the next batch</td>
<td>The suggested date of service for the first work order, not the date the work order is created. This date corresponds to the work order’s Suggested Maintenance Date. If left blank when the maintenance rule is created, this field inherits its initial value from the related maintenance asset. It auto-updates after each batch is generated.</td>
</tr>
<tr>
<td>Maintenance Asset</td>
<td>The asset associated with the maintenance plan.</td>
</tr>
<tr>
<td>Maintenance Work Rule Name</td>
<td>(Read Only) A name assigned to this maintenance work rule in the format MWR-nnnn.</td>
</tr>
<tr>
<td>Maintenance Plan</td>
<td>Maintenance plan associated with the maintenance asset.</td>
</tr>
<tr>
<td>Maintenance Work Rule Title</td>
<td>The title of this work order rule.</td>
</tr>
</tbody>
</table>
| Maintenance Work Rule Type                           | The type of maintenance work rule:  
  - Calendar-based (default): uses a recurrence pattern  
  - Criteria-based: uses a recordset filter criteria that defines conditions                                                                                                                                   |
| Owner                                                | The maintenance work rule owner.                                                                                                                                                                          |
| Parent Maintenance Plan Record                       | The maintenance plan this work rule applies to.                                                                                                                                                           |
| Parent Maintenance Record                            | The maintenance asset this work rule applies to.                                                                                                                                                          |
| Recordset Filter Criteria Name                       | The recordset filter criteria associated with this maintenance work rule.                                                                                                                                   |
| Recurrence Pattern                                   | For calendar-based rules, how frequently the event occurs during the selected time period.                                                                                                                    |
| Sort Order                                           | The sort order that applies to this work order rule.                                                                                                                                                       |
Work type associated with the maintenance work rule. Work orders generated from the maintenance work rule inherit its work type’s duration, required skills and products, and linked articles.

* The field label for the next suggested maintenance date on maintenance plans and maintenance assets is Date of the first work order in the next batch.

### Operating Hours Fields for Field Service

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

#### Operating Hours

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The description of the operating hours. Add any details that aren’t included in the name.</td>
</tr>
<tr>
<td>Name</td>
<td>The name of the operating hours. For example: Summer Hours, Winter Hours, or Peak Season Hours.</td>
</tr>
<tr>
<td>Time Zone</td>
<td>The time zone that the operating hours fall within.</td>
</tr>
</tbody>
</table>

#### Time Slot

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day of Week</td>
<td>The day of the week when the time slot takes place.</td>
</tr>
<tr>
<td>End Time</td>
<td>The time when the time slot ends.</td>
</tr>
<tr>
<td>Name</td>
<td>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.</td>
</tr>
<tr>
<td>Operating Hours</td>
<td>The operating hours that the time slot belongs to. An operating hours’ time slots appear in the Operating Hours related list.</td>
</tr>
<tr>
<td>Start Time</td>
<td>The time when the time slot starts.</td>
</tr>
</tbody>
</table>
**Field Name** | **Description**
--- | ---
Type | The type of time slot. Possible values are Normal and Extended. You may choose to use Extended to represent overtime shifts.

### Product Request and Transfer Fields

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

### Product Request

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

**Field Name** | **Description**
--- | ---
Account | The account associated with the product request.
Case | The case associated with the product request.
Currency ISO Code | Three-letter currency code. Available only if the multicurrency feature is enabled.
Description | Notes or context about the request.
Destination Location | Where the product is delivered.
Need By Date | Date the product must be delivered by.
Owner | The owner of the product request.
Product Request Number | (Read Only) An auto-generated number that identifies the product request.
Shipment Type | The type of shipment. The picklist includes the following values, which can be customized:
  - Rush
  - Overnight
  - Next Business Day
  - Pick Up
Ship To Address | The physical address where the product is delivered. For example, the mailing address of the warehouse that is requesting the product.
Source Location | Where the product is at the time of the request.
Status | The status of the shipment. The picklist includes the following values, which can be customized:
  - Draft: Finalizing the product request details.
Product Request and Transfer Fields

### Field Name

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>The product request is ready for processing.</td>
</tr>
<tr>
<td>Received</td>
<td>The department in charge of fulfilling the request is working on it.</td>
</tr>
<tr>
<td>Work Order</td>
<td>The work order associated with the product request.</td>
</tr>
<tr>
<td>Work Order Line Item</td>
<td>The work order line item associated with the product request.</td>
</tr>
</tbody>
</table>

### Product Request Line Item

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>The account associated with the product request line item.</td>
</tr>
<tr>
<td>Case</td>
<td>The case associated with the product request line item.</td>
</tr>
<tr>
<td>Description</td>
<td>Notes and context about the request.</td>
</tr>
<tr>
<td>Destination Location</td>
<td>Where the product is delivered.</td>
</tr>
<tr>
<td>Need By Date</td>
<td>Date the product must be delivered by.</td>
</tr>
<tr>
<td>Parent</td>
<td>The product request that the line item belongs to.</td>
</tr>
<tr>
<td>Product</td>
<td>The product being requested.</td>
</tr>
<tr>
<td>Product Request Line Item Number</td>
<td>(Read Only) An auto-assigned number that identifies the product request line item.</td>
</tr>
<tr>
<td>Quantity Requested</td>
<td>The amount requested.</td>
</tr>
<tr>
<td>Quantity Unit Of Measure</td>
<td>Units of the requested product; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.</td>
</tr>
<tr>
<td>Shipment Type</td>
<td>The type of shipment. The picklist includes the following values, which can be customized:</td>
</tr>
<tr>
<td></td>
<td>- Rush</td>
</tr>
<tr>
<td></td>
<td>- Overnight</td>
</tr>
<tr>
<td></td>
<td>- Next Business Day</td>
</tr>
<tr>
<td></td>
<td>- Pick Up</td>
</tr>
<tr>
<td>Ship To Address</td>
<td>The physical address where the product is delivered.</td>
</tr>
<tr>
<td>Source Location</td>
<td>Where the product is at time of the request.</td>
</tr>
</tbody>
</table>
### Field Name | Description
---|---
**Status** | The status of the shipment. The picklist includes the following values, which can be customized:
- Draft
- Submitted
- Received

**Work Order** | The work order associated with the product request line item.

**Work Order Line Item** | The work order line item associated with the product request line item.

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>Notes or context about the transfer.</td>
</tr>
<tr>
<td><strong>Destination Location</strong></td>
<td>The location where the product is to be delivered.</td>
</tr>
<tr>
<td><strong>Expected Pickup Date</strong></td>
<td>Date the product is expected to be picked up.</td>
</tr>
<tr>
<td><strong>Owner</strong></td>
<td>Owner of the product transfer.</td>
</tr>
<tr>
<td><strong>Product Name</strong></td>
<td>The product associated with the product transfer. If the product is being transferred from outside your inventory—for example, if it's being ordered from a manufacturer—enter a product name. Otherwise, we recommend entering a source product item.</td>
</tr>
<tr>
<td><strong>Product Request</strong></td>
<td>The product request associated with the product transfer. Not all transfers are created in response to a product request.</td>
</tr>
<tr>
<td><strong>Product Request Line Item</strong></td>
<td>The product request line item associated with the product transfer. Create a separate transfer for each line item on a product request.</td>
</tr>
<tr>
<td><strong>Quantity Received</strong></td>
<td>Amount of product received at the destination location.</td>
</tr>
<tr>
<td><strong>Quantity Sent</strong></td>
<td>Amount of product sent from the source location.</td>
</tr>
<tr>
<td><strong>Quantity Unit Of Measure</strong></td>
<td>The units of the product; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.</td>
</tr>
<tr>
<td><strong>Received</strong></td>
<td>Indicates that the product was received. To mark a product transfer received, you need permission to update product items. Once you mark a product item received, you can't undo it. <strong>Note:</strong> To find out what happens when a product transfer is marked received, see <a href="#">Guidelines for Transferring Inventory</a>.</td>
</tr>
<tr>
<td><strong>Received By</strong></td>
<td>The contact who received the product at the destination location.</td>
</tr>
</tbody>
</table>
### Field Service

#### Product Request and Transfer Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Return Order</td>
<td>The return order associated with the product transfer.</td>
</tr>
<tr>
<td>Return Order Line Item</td>
<td>The return order line item associated with the product transfer.</td>
</tr>
<tr>
<td>Shipment</td>
<td>The shipment related to the product transfer.</td>
</tr>
<tr>
<td>Shipment Expected Delivery Date</td>
<td>The expected date of delivery, inherited from the related shipment.</td>
</tr>
<tr>
<td>Shipment Status</td>
<td>The shipment status, inherited from the related shipment. It includes the</td>
</tr>
<tr>
<td></td>
<td>following values, which can be customized:</td>
</tr>
<tr>
<td></td>
<td>• Shipped</td>
</tr>
<tr>
<td></td>
<td>• Delivered</td>
</tr>
<tr>
<td>Shipment Tracking Number</td>
<td>The shipment tracking number, inherited from the related shipment.</td>
</tr>
<tr>
<td>Shipment Tracking URL</td>
<td>The shipment tracking URL, inherited from the related shipment.</td>
</tr>
<tr>
<td>Source Location</td>
<td>The location where the product is coming from.</td>
</tr>
<tr>
<td>Source Product Item</td>
<td>The product item representing the stock at the source location. Enter a</td>
</tr>
<tr>
<td></td>
<td>source product item if the product is being transferred from a location</td>
</tr>
<tr>
<td></td>
<td>within your inventory, such as a warehouse. Specifying a source product</td>
</tr>
<tr>
<td></td>
<td>item on a product transfer automatically updates the quantity at the</td>
</tr>
<tr>
<td></td>
<td>source location to reflect the transfer. If the product is being</td>
</tr>
<tr>
<td></td>
<td>transferred from outside your inventory—for example, if it’s being</td>
</tr>
<tr>
<td></td>
<td>ordered from a manufacturer—use the Product Name field instead.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the product transfer. It includes the following values, which</td>
</tr>
<tr>
<td></td>
<td>can be customized:</td>
</tr>
<tr>
<td></td>
<td>• Ready for Pickup</td>
</tr>
<tr>
<td></td>
<td>• Completed</td>
</tr>
</tbody>
</table>

#### Shipment

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Delivery Date</td>
<td>Date the product was delivered.</td>
</tr>
<tr>
<td>Delivered To</td>
<td>The person or entity the product was delivered too.</td>
</tr>
<tr>
<td>Description</td>
<td>Notes or context about the shipment.</td>
</tr>
<tr>
<td>Destination Location</td>
<td>The place the product is to be delivered.</td>
</tr>
<tr>
<td>Expected Delivered Date</td>
<td>Date the product is expected to be delivered.</td>
</tr>
<tr>
<td>Owner Name</td>
<td>Owner of the shipment.</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Ship From Address</td>
<td>The place the product is coming from.</td>
</tr>
<tr>
<td>Shipment Number</td>
<td>(Read Only) An auto-assigned number that identifies the shipment.</td>
</tr>
<tr>
<td>Shipping Provider</td>
<td>The company or person making the transfer.</td>
</tr>
<tr>
<td>Ship To Address</td>
<td>The address the product is to be delivered.</td>
</tr>
<tr>
<td>Source Location</td>
<td>The address the product is shipped from.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the shipment. The picklist includes the following values, which can be customized:</td>
</tr>
<tr>
<td></td>
<td>• Shipped—The product is in transit.</td>
</tr>
<tr>
<td></td>
<td>• Delivered—The product is at the destination location.</td>
</tr>
<tr>
<td>Tracking Number</td>
<td>Tracking number for the shipment.</td>
</tr>
<tr>
<td>Tracking URL</td>
<td>URL of website used for tracking the shipment.</td>
</tr>
</tbody>
</table>

### Product Item and Inventory Fields

Product items, product item transactions, products required, and products consumed have the following fields. Sometimes you can’t see or edit certain fields because of your page layout and field-level security settings.

#### Product Item

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Location associated with the product item. This location usually indicates where the product item is stored.</td>
</tr>
<tr>
<td>Owner</td>
<td>The product item’s owner.</td>
</tr>
<tr>
<td>Product Item Number</td>
<td>(Read Only) Auto-generated number identifying the product item.</td>
</tr>
<tr>
<td>Product Name</td>
<td>Product associated with the product item.</td>
</tr>
<tr>
<td>Quantity On Hand</td>
<td>The quantity at the location. If you want to add a serial number, this value must be 1.</td>
</tr>
<tr>
<td>Quantity Unit of Measure</td>
<td>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.</td>
</tr>
</tbody>
</table>
**Field Name** | **Description**
---|---
Serial Number | A unique number for identification purposes. If you want to enter a serial number, the Quantity on Hand must be 1. **Tip**: To learn more about the pros and cons of assigning serial numbers to product items, see [Create Product Items to Represent Inventory](#).

---

**Product Item Transaction**

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>A description of the transaction. The description is blank when the transaction record is created, but can be updated.</td>
</tr>
<tr>
<td>Product Item</td>
<td>The associated product item.</td>
</tr>
<tr>
<td>Product Item Transaction Number</td>
<td>(Read Only) Auto-generated number identifying the product item transaction.</td>
</tr>
<tr>
<td>Quantity</td>
<td>The quantity of the product item involved in the transaction. If inventory was consumed, the quantity is negative.</td>
</tr>
<tr>
<td>Related Record</td>
<td>(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.</td>
</tr>
<tr>
<td>Transaction Type</td>
<td>The action that the transaction tracks.</td>
</tr>
<tr>
<td>• Replenished: When a part is stocked at a location. A Replenished transaction is created when a product item is created.</td>
<td></td>
</tr>
<tr>
<td>• 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.</td>
<td></td>
</tr>
<tr>
<td>• Adjusted: When there's 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.</td>
<td></td>
</tr>
<tr>
<td>• Transferred: When parts are transferred between locations.</td>
<td></td>
</tr>
</tbody>
</table>

---

**Product Required**

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Record</td>
<td>Associated work order or work order line item.</td>
</tr>
<tr>
<td>Parent Record Type</td>
<td>Indicates whether the parent record is a work order or a work order line item.</td>
</tr>
<tr>
<td>Product Required</td>
<td>Name of the required product.</td>
</tr>
<tr>
<td>Product Required Number</td>
<td>Auto-generated number identifying the product required.</td>
</tr>
<tr>
<td>Quantity Required</td>
<td>Amount required of the product.</td>
</tr>
<tr>
<td>Quantity Unit of Measure</td>
<td>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.</td>
</tr>
</tbody>
</table>

### Product Consumed

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

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Notes and context about the product consumed.</td>
</tr>
<tr>
<td>Discount</td>
<td>The discount provided.</td>
</tr>
<tr>
<td>List Price</td>
<td>The list price of the product.</td>
</tr>
<tr>
<td>Price Book Entry</td>
<td>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.</td>
</tr>
<tr>
<td>Product</td>
<td>Product associated with the product consumed.</td>
</tr>
<tr>
<td>Product Consumed Number</td>
<td>(Read Only) Auto-generated number identifying the product consumed.</td>
</tr>
<tr>
<td>Product Item</td>
<td>Product item associated with the product consumed. Creating a product consumed record subtracts the quantity consumed from the linked product item’s quantity.</td>
</tr>
<tr>
<td>Quantity Consumed</td>
<td>The quantity of products consumed.</td>
</tr>
<tr>
<td>Quantity Unit of Measure</td>
<td>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.</td>
</tr>
<tr>
<td>Subtotal</td>
<td>The product’s unit price multiplied by the quantity consumed.</td>
</tr>
<tr>
<td>Total Price</td>
<td>The product’s unit price multiplied by the quantity consumed minus the discount.</td>
</tr>
</tbody>
</table>
### Field Service

#### Return Order Fields

Return orders and return order line items have the following fields. Sometimes you can’t see or edit certain fields because of your page layout and field-level security settings.

#### Return Order

Return orders track the return or repair of products and inventory.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>The account associated with the return order.</td>
</tr>
<tr>
<td>Case</td>
<td>The case associated with the return order.</td>
</tr>
<tr>
<td>Contact</td>
<td>The contact associated with the return order.</td>
</tr>
<tr>
<td>Description</td>
<td>Notes or context about the return order.</td>
</tr>
<tr>
<td>Destination Location</td>
<td>The location where the items are being returned to. For example, if the return order tracks the return of products from a mobile worker’s van to a warehouse, the warehouse is the destination location.</td>
</tr>
<tr>
<td>Expected Arrival Date</td>
<td>The date when the items are expected to arrive at the destination location.</td>
</tr>
<tr>
<td>Order</td>
<td>The order associated with the return order. When you associate a return order with an order, you can associate the return order’s line items with order products.</td>
</tr>
<tr>
<td>Owner</td>
<td>The owner of the return order.</td>
</tr>
<tr>
<td>Product Request</td>
<td>The product request associated with the return order. When you associate 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 can 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 mobile worker creates a product request for three motors to prepare</td>
</tr>
</tbody>
</table>
### Field Service

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description Field Name</td>
<td>for a field visit. If the worker 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.</td>
</tr>
<tr>
<td>Product Service Campaign</td>
<td>The product service campaign associated with the return order.</td>
</tr>
<tr>
<td>Return Order Number</td>
<td>(Read only) Auto-generated number identifying the return order.</td>
</tr>
<tr>
<td>Returned By</td>
<td>The user returning the items.</td>
</tr>
<tr>
<td>Ship From Address</td>
<td>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.</td>
</tr>
</tbody>
</table>
| Shipment Type                    | The type of shipment associated with the return order. Available values are:  
  - Standard (default value)  
  - Rush  
  - Overnight  
  - Next Business Day  
  - Pickup                                                                                                                                                                                                                                                                     |
| Source Location                  | The items' location at the start of the return or repair. For example, if the return order tracks the return of products from a mobile worker's service vehicle to a warehouse, the service vehicle is the source location.                                                                                                                                     |
| Status                           | The status of the return order. Available values are:  
  - Draft  
  - Submitted  
  - Approved  
  - Canceled  
  - Closed                                                                                                                                                                                                                                                                 |

### Return Order Line Item

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset</td>
<td>The asset associated with the return order line item. One or more of the following fields must be completed: Asset, Order Product, Product, Product Item, and Product Request Line Item.</td>
</tr>
<tr>
<td>Description</td>
<td>Notes or context about the return order line item.</td>
</tr>
<tr>
<td>Destination Location</td>
<td>The location where the items are being returned to. For example, if the return order tracks the return of products from a mobile worker’s service vehicle to a warehouse, the service vehicle is the source location.</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>worker's van to a warehouse, the</td>
<td>worker's van to a warehouse, the warehouse is the destination location.</td>
</tr>
<tr>
<td>warehouse is the destination</td>
<td></td>
</tr>
<tr>
<td>location.</td>
<td></td>
</tr>
<tr>
<td>Order Product</td>
<td>The order product associated with the return order line item. One or more of the following fields must be completed: Asset, Order Product, Product, Product Item, and Product Request Line Item.</td>
</tr>
<tr>
<td>Processing Plan</td>
<td>Indicates the preferred fate of the items following their return. Available values are:</td>
</tr>
<tr>
<td></td>
<td>• Repair—Repair the items and return them to the owner</td>
</tr>
<tr>
<td></td>
<td>• Discard—Discard the items</td>
</tr>
<tr>
<td></td>
<td>• Salvage—Salvage the items’ working components</td>
</tr>
<tr>
<td></td>
<td>• Restock—Return the items to your inventory</td>
</tr>
<tr>
<td>Product</td>
<td>The product item representing the location of the product at the start of the return. One or more of the following fields must be completed: Asset, Order Product, Product, Product Item, and Product Request Line Item.</td>
</tr>
<tr>
<td>Product Item</td>
<td>The product item associated with the return order line item. One or more of the following fields must be completed: Asset, Order Product, Product, Product Item, and Product Request Line Item.</td>
</tr>
<tr>
<td>Product Request Line Item</td>
<td>The product request line item associated with the return order line item. One or more of the following fields must be completed: Asset, Order Product, Product, Product Item, and Product Request Line Item.</td>
</tr>
<tr>
<td>Product Service Campaign</td>
<td>The product service campaign associated with the return order.</td>
</tr>
<tr>
<td>Product Service Campaign Item</td>
<td>The product service campaign item associated with the return order.</td>
</tr>
<tr>
<td>Quantity Returned</td>
<td>The quantity of items being returned. If multiple types of products are being returned, track each product in a different return order line item.</td>
</tr>
<tr>
<td>Quantity Unit of Measure</td>
<td>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 on products.</td>
</tr>
<tr>
<td>Reason for Return</td>
<td>The reason the items are being returned. Available values are:</td>
</tr>
<tr>
<td></td>
<td>• Damaged</td>
</tr>
<tr>
<td></td>
<td>• Defective</td>
</tr>
<tr>
<td></td>
<td>• Duplicate Order</td>
</tr>
<tr>
<td></td>
<td>• Wrong Item</td>
</tr>
<tr>
<td></td>
<td>• Wrong Quantity</td>
</tr>
<tr>
<td></td>
<td>• Not Satisfied</td>
</tr>
</tbody>
</table>
### Field Name

<table>
<thead>
<tr>
<th>Description</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Outdated</td>
<td></td>
</tr>
<tr>
<td>• Other</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Repayment Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The method used to reimburse the customer or owner for the items being returned. Available values are:</td>
</tr>
<tr>
<td></td>
<td>• Replace—the items are replaced</td>
</tr>
<tr>
<td></td>
<td>• Refund—the items are returned and the owner is refunded</td>
</tr>
<tr>
<td></td>
<td>• Credit—the items are returned and the owner receives credit for them</td>
</tr>
<tr>
<td></td>
<td>• Return—the items are returned to the owner, for example, after repairs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Return Order</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The return order that the return order line item belongs to.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Return Order Line Item Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Read only) Autogenerated number that identifies the return order line item.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Source Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The items’ location at the start of the return or repair. For example, if the return order tracks the return of products from a mobile worker’s service vehicle to a warehouse, the service vehicle is the source location.</td>
</tr>
</tbody>
</table>

---

## Service Appointment Fields for Field Service

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

### Field Name

<table>
<thead>
<tr>
<th>Description</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Account</td>
</tr>
<tr>
<td></td>
<td>Actual Duration (Minutes)</td>
</tr>
</tbody>
</table>

### Description

<table>
<thead>
<tr>
<th>Description</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>(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.</td>
<td>Account</td>
</tr>
<tr>
<td>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.</td>
<td>Actual Duration (Minutes)</td>
</tr>
</tbody>
</table>

---

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual End</td>
<td>The actual date and time the appointment ended.</td>
</tr>
<tr>
<td>Actual Start</td>
<td>The actual date and time the appointment started.</td>
</tr>
<tr>
<td>Address</td>
<td>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.</td>
</tr>
<tr>
<td>Appointment Number</td>
<td>An auto-assigned number that identifies the appointment.</td>
</tr>
<tr>
<td>Arrival Window End</td>
<td>The end of the window of time in which the mobile worker 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.</td>
</tr>
<tr>
<td>Arrival Window Start</td>
<td>The beginning of the window of time in which the mobile worker 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.</td>
</tr>
<tr>
<td>Bundle</td>
<td>Indicates if this service appointment is a bundle service appointment. The default value is false.</td>
</tr>
<tr>
<td>Bundle Member</td>
<td>Indicates if this service appointment is a bundle member service appointment. The default value is false.</td>
</tr>
<tr>
<td>Bundle Policy</td>
<td>Reference to the bundle policy associated with this service appointment.</td>
</tr>
<tr>
<td>Contact</td>
<td>The contact associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the appointment.</td>
</tr>
<tr>
<td>Due Date</td>
<td>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.</td>
</tr>
<tr>
<td>Duration</td>
<td>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.</td>
</tr>
<tr>
<td>Duration Type</td>
<td>The unit of the duration: Minutes or Hours.</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Earliest Start Permitted</td>
<td>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.</td>
</tr>
<tr>
<td>Manually Bundled</td>
<td>Indicates if this bundle was created manually. The default value is false.</td>
</tr>
<tr>
<td>Parent Record</td>
<td>The parent record associated with the appointment. The parent record can't be updated after the service appointment is created.</td>
</tr>
<tr>
<td>Parent Record Status Category</td>
<td>(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.</td>
</tr>
<tr>
<td>Parent Record Type</td>
<td>(Read only) The type of parent record: Account, Asset, Lead, Opportunity, Work Order, or Work Order Line Item.</td>
</tr>
<tr>
<td>Related Bundle</td>
<td>The bundle that this service appointment is a member of.</td>
</tr>
<tr>
<td>Scheduled End</td>
<td>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.</td>
</tr>
<tr>
<td>Scheduled Start</td>
<td>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.</td>
</tr>
<tr>
<td>Service Note</td>
<td>Add notes such as an appointment summary or recommendations for future work. Depending on your settings, these notes might appear on a customer-facing service report.</td>
</tr>
<tr>
<td>Service Territory</td>
<td>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.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the appointment. The picklist includes the following values, which can be customized:</td>
</tr>
<tr>
<td></td>
<td>• None—Default value.</td>
</tr>
<tr>
<td></td>
<td>• Scheduled—The service appointment is scheduled.</td>
</tr>
<tr>
<td></td>
<td>• Dispatched—The service resource is in route.</td>
</tr>
<tr>
<td></td>
<td>• In Progress—The service resource started the work.</td>
</tr>
<tr>
<td></td>
<td>• Cannot Complete—The service resource couldn’t complete the appointment for any reason.</td>
</tr>
<tr>
<td></td>
<td>• Completed—The service resource completed the work.</td>
</tr>
<tr>
<td></td>
<td>• Canceled—The service appointment has been canceled.</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Status Category</td>
<td>The category that each Status value falls into. The Status Category field’s values are identical to the standard 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?</td>
</tr>
<tr>
<td>Subject</td>
<td>A short phrase describing the appointment.</td>
</tr>
<tr>
<td>Work Type</td>
<td>(Read only) 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. <strong>Note:</strong> 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.</td>
</tr>
</tbody>
</table>

### Service Crew Fields

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

#### Service Crew

Service crews are groups of users who can be assigned to a service appointment as a unit. Create service crews from the crew management tool or the Service Crews tab.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crew Size</td>
<td>The ideal number of members on the crew. This field doesn’t update when you add or remove members. <strong>Note:</strong> You can add crew size requirements to work types, work orders, and work order line items that are enforced during scheduling. To learn more, see Considerations for Scheduling Service Crews.</td>
</tr>
<tr>
<td>Gantt Color</td>
<td>Hex code of the crew’s background color on the Gantt. Crews without a set Gantt color appear in purple. For example, set the Gantt color to green (#008000) for all service crews that use a company vehicle.</td>
</tr>
</tbody>
</table>

---

**EDITIONS**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.
### Service Crew Fields

This is a Field Service managed package feature.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the service crew. For example, Repair Crew.</td>
</tr>
<tr>
<td>Owner</td>
<td>By default, the person who created the service crew.</td>
</tr>
</tbody>
</table>

### Service Crew Member

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>The last day that the service resource belongs to the crew. You can use this field to track employment dates for contractors.</td>
</tr>
<tr>
<td>Gantt Label</td>
<td>Custom label that appears beneath the member’s name on the Gantt. For example, enter the person’s job title.</td>
</tr>
<tr>
<td>Leader</td>
<td>Indicates that the member is the crew leader. Leaders can edit assigned appointments and their parent records, while members can only view them. Crew geolocation is based on the leader’s location. Leaders appear in the crew management tool with a star next to their name.</td>
</tr>
<tr>
<td>Name</td>
<td>The name of the crew member. Depending on your preference, you can enter the service resource’s name or their role in the crew.</td>
</tr>
<tr>
<td>Service Crew</td>
<td>The crew that the service resource belongs to.</td>
</tr>
<tr>
<td>Service Resource</td>
<td>The service resource that belongs to the crew.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Required. The day the service resource joins the crew.</td>
</tr>
</tbody>
</table>
Service Report Fields

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

Service Report

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent ID</td>
<td>The ID of the record that the service report is summarizing. For example, if you click Create Service Report on a service appointment, this field lists the service appointment’s record ID.</td>
</tr>
<tr>
<td>Service Report Language</td>
<td>The language used for the service report. The language is selected in the Service Report Language 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.</td>
</tr>
<tr>
<td>Service Report Name</td>
<td>The name of the service report.</td>
</tr>
<tr>
<td>Service Report Template</td>
<td>The template used to create the service report.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If the person creating the service report doesn’t have Read access to objects or fields in the service report template, those fields aren’t visible in the report they create.</td>
</tr>
<tr>
<td>Signed</td>
<td>Indicates that the service report contains one or more signatures.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> To quickly find signed reports, add this field to the Service Reports related list on work orders.</td>
</tr>
</tbody>
</table>

Digital Signature

Digital Signatures are signatures captured on service reports. For example, mobile workers can collect signatures from customers, other workers, or anyone else involved in field service work.

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

### Service Resource Fields for Field Service

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

### Service Resource

Service resources represent individual users or groups of users (known as service crews) who can complete field service work.

| Field Name | Description |
---|---|
Active | When selected, this option means that the resource can be assigned to work orders. For service tracking purposes, resources can’t be deleted, so deactivating a resource is the best way to send them into retirement. |
Capacity-Based | Capacity-based resources are limited to a certain number of hours or appointments in a specified time period. **Tip:** The Capacities related list shows a resource’s capacity. |
Description | The description of the resource. |
### Field Service Fields for Field Service

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include in Scheduling Optimization</td>
<td>Use only if the Field Service managed package is installed. When selected, this option checks whether the resource can be assigned to service appointments during the optimization process. To be included in optimization, resources need the Field Service Scheduling permission set license. If this option is selected and the resource doesn't have the permission set license, the user creating the service resource is prompted to assign it.</td>
</tr>
<tr>
<td>Location</td>
<td>The location associated with the service resource. For example, a service vehicle driven by the service resource.</td>
</tr>
<tr>
<td>Name</td>
<td>The resource's name. This name can be the name or title of the associated user or crew.</td>
</tr>
<tr>
<td>Resource Type</td>
<td>Indicates whether a resource is a technician (mobile worker), dispatcher, or crew. Resources who are dispatchers can't be capacity-based or included in schedule optimization. Only users with the Field Service Dispatcher permission set license can be dispatchers. You can't add additional resource types.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Field Service users can see Asset as a picklist option in the Resource Type field. However, you can't save the record when you select Asset in an org that doesn't have access to Lightning Scheduler.</td>
</tr>
<tr>
<td>Service Crew</td>
<td>The associated service crew. If the service resource represents a crew, select the crew.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> 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.</td>
</tr>
<tr>
<td>User</td>
<td>The associated user. If the service resource represents a crew instead of a single user, leave this field blank.</td>
</tr>
</tbody>
</table>

### Resource Absence

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absence Number</td>
<td>(Read only) An auto-generated number identifying the absence.</td>
</tr>
<tr>
<td>Absence Type</td>
<td>The type of absence: Meeting, Training, Medical, or Vacation. You can add custom values if needed, but the name Break is reserved for the managed package.</td>
</tr>
<tr>
<td>Address</td>
<td>The address associated with the absence.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the absence.</td>
</tr>
</tbody>
</table>
### Field Name

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Time</td>
<td>The date and time when the absence ends.</td>
</tr>
<tr>
<td>Resource Name</td>
<td>The absent service resource.</td>
</tr>
<tr>
<td>Start Time</td>
<td>The date and time when the absence begins.</td>
</tr>
</tbody>
</table>

### Resource Capacity

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>The date the capacity ends; for example, the end date of a contract.</td>
</tr>
<tr>
<td>Name</td>
<td>(Read only) An auto-generated number identifying the capacity record.</td>
</tr>
<tr>
<td>Hours per Time Period</td>
<td>The number of hours that the resource can work per time period. You must fill out this field, the Work Items per Time Period field, or both.</td>
</tr>
<tr>
<td>Service Resource</td>
<td>The associated resource.</td>
</tr>
<tr>
<td>Start Date</td>
<td>The date the capacity goes into effect.</td>
</tr>
<tr>
<td>Time Period</td>
<td>Day, Week, or Month. For example, if a resource can work 80 hours per month, select Month and enter 80 in Hours per Time Period.</td>
</tr>
<tr>
<td>Work Items per Time Period</td>
<td>The total number of service appointments that the resource can complete per time period. You must fill out this field, the Hours per Time Period field, or both.</td>
</tr>
</tbody>
</table>

### Assigned Resource

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Travel Time (Minutes)</td>
<td>The actual travel time in minutes to the work site.</td>
</tr>
<tr>
<td>Assigned Resource Number</td>
<td>An auto-generated number identifying the assigned resource.</td>
</tr>
<tr>
<td>Estimated Travel Time (Minutes)</td>
<td>The estimated travel time in minutes to the work site.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: If the resource represents a crew, you can’t track individual crew members’ travel time unless you create an assigned resource record for each crew member.</td>
</tr>
<tr>
<td>Service Appointment</td>
<td>The related service appointment.</td>
</tr>
</tbody>
</table>
**Service Resource Fields for Field Service**

**Field Name**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Crew</td>
<td>The service crew assigned to the appointment. Typically, appointments are assigned to crews by creating an assigned resource record that links to the service crew record. If you’re using that approach, you can leave the Service Crew field blank. If you want to assign an appointment to crew members individually so you can track each member’s travel time, create an assigned resource record for each crew member that has both the User and Service Crew fields completed. This field is hidden for all users by default. To use it, update its field-level security settings in Setup and add it to your assigned resource page layouts.</td>
</tr>
<tr>
<td>Service Resource</td>
<td>The service resource assigned to the appointment.</td>
</tr>
</tbody>
</table>

**Resource Preference**

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| Preference Type     | • Preferred: Indicates that the customer would like their field service work assigned to the resource  
• Required: Indicates that the resource must be assigned to the customer’s field service work  
• Excluded: Indicates that the customer does not want their field service work assigned to the resource  

Resource preferences serve more as a suggestion than a requirement. You can still assign a service appointment to any resource regardless of the related work order’s resource preferences. |
| Related Record      | The work order or account with the resource preference.                                                                                                                                                     |
| Resource Preference Number | An auto-generated number identifying the resource preference.                                                                                                                                                |
| Service Resource    | The service resource that is preferred, required, or excluded.                                                                                                                                              |
Service Territory Fields for Field Service

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

### Service Territory

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>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.</td>
</tr>
<tr>
<td>Address</td>
<td>An address to associate with the territory. You may want to list the address of the territory’s headquarters. A service territory’s primary members use its address as their home base unless a different address is specified on the member record. If the Field Service managed package is installed, the home base is used to calculate travel for the first and last leg of the day.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the territory.</td>
</tr>
<tr>
<td>Name</td>
<td>The name of the territory.</td>
</tr>
<tr>
<td>Operating Hours</td>
<td>The territory’s operating hours, which indicate when service appointments within the territory should occur. Service resources who are members of a territory automatically inherit the territory’s operating hours unless different hours are specified on the service territory member record.</td>
</tr>
<tr>
<td>Parent Territory</td>
<td>The territory’s parent service territory, if it has one. For example, a Northern California territory can have a State of California territory as its parent.</td>
</tr>
<tr>
<td>Top-Level Territory</td>
<td>(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.</td>
</tr>
</tbody>
</table>
### Field Service

#### Service Territory Fields for Field Service

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Typical In-Territory Travel Time</td>
<td>Estimated number of minutes needed to travel from one location to another within the service territory. You can use this field in Apex customization.</td>
</tr>
</tbody>
</table>

#### Service Territory Member

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>The member’s address. You may want to list the related service resource’s address in this field.</td>
</tr>
<tr>
<td>End Date</td>
<td>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.</td>
</tr>
<tr>
<td>Member Number</td>
<td>(Read only) An auto-generated number identifying the service territory member.</td>
</tr>
<tr>
<td>Operating Hours</td>
<td>The member’s operating hours, which are inherited from the service territory.</td>
</tr>
<tr>
<td>Service Resource</td>
<td>The service resource assigned to the service territory.</td>
</tr>
<tr>
<td>Service Territory</td>
<td>The service territory that the service resource is assigned to.</td>
</tr>
<tr>
<td>Start Date</td>
<td>The date when the service resource becomes a member of the service territory.</td>
</tr>
</tbody>
</table>

#### Territory Type

- Primary: Where the resource works most often—for example, near their home base. Service resources can have only one primary territory.
- Secondary: Where the resource can be assigned to appointments if needed. Service resources can have multiple secondary territories with overlapping dates.
- Relocation: Representing a temporary move. Resources with relocation territories are always assigned to appointments 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 can have the following territories:

- Primary territory: West Chicago
- Secondary territories:
  - East Chicago
  - South Chicago
Service Territory Location

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>The related location.</td>
</tr>
<tr>
<td>Service Territory</td>
<td>The related service territory.</td>
</tr>
<tr>
<td>Service Territory Location Number</td>
<td>An auto-generated number identifying the territory location.</td>
</tr>
</tbody>
</table>

Shift Fields for Field Service

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

Shifts can be used to schedule and dispatch service resources.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background Color</td>
<td>Color code shifts by adding a background color in hexadecimal format.</td>
</tr>
<tr>
<td>Created By</td>
<td>(Read Only) User who created the time sheet.</td>
</tr>
<tr>
<td>Created Date</td>
<td>(Read Only) Date the time sheet was created.</td>
</tr>
<tr>
<td>End Time</td>
<td>The date and time that the shift ends.</td>
</tr>
<tr>
<td>Job Profile</td>
<td>Job profile associated with the shift.</td>
</tr>
<tr>
<td>Label</td>
<td>The customizable label, or name, for the shift.</td>
</tr>
<tr>
<td>Last Modified By</td>
<td>(Read Only) User who last modified the time sheet.</td>
</tr>
<tr>
<td>Last Modified Date</td>
<td>(Read Only) Date the time sheet was last modified.</td>
</tr>
<tr>
<td>Non-Standard</td>
<td>Marks a shift as non-standard, such as evening or on-call shifts.</td>
</tr>
<tr>
<td>Owner Name</td>
<td>Shift owner.</td>
</tr>
<tr>
<td>Recordset Filter Criteria</td>
<td>Recordset filter criteria associated with the shift. Filter criteria can be used to match shift and service territory records against criteria you create.</td>
</tr>
</tbody>
</table>
Field Name | Description
--- | ---
Service Resource | Service resource associated with the shift.
Service Territory | Service territory associated with the shift.
Shift Number | (Read Only) The number automatically created for the shift.
Start Time | The date and time that the shift starts.
Status | The status of the shift. The picklist includes the following values, which can be customized:
  - Tentative
  - Published
  - Confirmed
Status Category | The status of the shift using static values. This field is derived from the Status field using the mapping you define. The picklist includes the following values:
  - Tentative
  - Published
  - Confirmed
Time Slot Type | The type of time slot for the shift. This field uses the same values as the Time Slot field in the Operating Hours object. The picklist includes the following values:
  - Normal
  - Extended

Skill Fields for Field Service

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

Skill

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

Field Name | Description
--- | ---
Name | The name of the skill.
Description | The description of the skill.
Developer Name | The unique name of the skill in the API.
Note: When you create a skill, leave the Assign Users and Assign Profiles sections blank. They are specific to Chat, which also uses skills.

## Service Resource Skill

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>The date when the skill expires. For example, if a resource must be re-certified after six months, the end date would be the date their certification expires.</td>
</tr>
<tr>
<td>Service Resource</td>
<td>The resource who possesses the skill.</td>
</tr>
<tr>
<td>Skill</td>
<td>The skill the resource possesses.</td>
</tr>
<tr>
<td>Skill Level</td>
<td>The resource's skill level. Skill level can range from zero to 99.99.</td>
</tr>
<tr>
<td>Start Date</td>
<td>The date when the resource gains the skill. For example, if the skill represents a certification, the start date would be the date of certification.</td>
</tr>
</tbody>
</table>

## Skill Requirement

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related Record</td>
<td>The work order, work order line item, or work type that the skill is required on.</td>
</tr>
<tr>
<td>Skill</td>
<td>The required skill.</td>
</tr>
<tr>
<td>Skill Level</td>
<td>The required skill level. Skill level can range from zero to 99.99.</td>
</tr>
</tbody>
</table>
Time Sheet Fields

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

**Time Sheet**

Time sheets relate service resources with their time and attendance.

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

**Time Sheet Entry**

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

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

Work orders have the following fields. Sometimes you can’t see or edit certain fields because of your page layout and field-level security settings.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>The account associated with the work order.</td>
</tr>
<tr>
<td>Address</td>
<td>The compound form of the address where the work order is completed. The work order’s service appointments and line items inherit its address, though the address on line items can be updated.</td>
</tr>
<tr>
<td>Asset</td>
<td>The asset associated with the work order.</td>
</tr>
<tr>
<td>Business Hours</td>
<td>The business hours associated with the work order.</td>
</tr>
<tr>
<td>Case</td>
<td>The case associated with the work order.</td>
</tr>
<tr>
<td>City</td>
<td>The city where the work order is completed. Maximum length is 40 characters.</td>
</tr>
<tr>
<td>Contact</td>
<td>The contact associated with the work order.</td>
</tr>
<tr>
<td>Country</td>
<td>The country where the work order is completed. Maximum length is 80 characters.</td>
</tr>
<tr>
<td>Currency ISO Code</td>
<td>Three-letter currency code. Available only if the multicurrency feature is enabled.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the work order. We recommend describing the steps a user takes to mark the work order Completed.</td>
</tr>
<tr>
<td>Discount</td>
<td>(Read Only) The weighted average of the discounts on all line items on the work order. It can be any positive number up to 100.</td>
</tr>
<tr>
<td>Duration</td>
<td>The estimated time required to complete the work order. Specify the duration unit in the Duration Type field.</td>
</tr>
</tbody>
</table>

**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.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DurationInMinutes</td>
<td>The estimated time required to complete the work order, in minutes. This field is for internal use.</td>
</tr>
<tr>
<td>Duration Type</td>
<td>The unit of the duration: Minutes or Hours.</td>
</tr>
<tr>
<td>End Date</td>
<td>The date when the work order is completed. This field is blank unless you set up automation to configure it. For a sample workflow rule that configures the Start Date field (a similar field), see Start Date.</td>
</tr>
<tr>
<td>Entitlement</td>
<td>The entitlement associated with the work order.</td>
</tr>
<tr>
<td>Entitlement Process End Time</td>
<td>The time the work order exits an entitlement process. If an entitlement process applies to a work order, this field appears.</td>
</tr>
<tr>
<td>Entitlement Process Start Time</td>
<td>The time the work order entered an entitlement process. If an entitlement process applies to a work order, this field appears.</td>
</tr>
<tr>
<td>Generated from maintenance plan</td>
<td>(Read Only) Indicates that the work order was generated from a maintenance plan rather than manually created.</td>
</tr>
<tr>
<td>Note:</td>
<td>This option is deselected for work orders that were generated from maintenance plans before Summer '18.</td>
</tr>
<tr>
<td>Geocode Accuracy</td>
<td>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.</td>
</tr>
<tr>
<td>Grand Total</td>
<td>(Read Only) The total price of the work order with tax added.</td>
</tr>
<tr>
<td>Is Closed</td>
<td>Indicates whether the work order is closed.</td>
</tr>
<tr>
<td>Tip:</td>
<td>Use this field to report on closed versus open work orders.</td>
</tr>
<tr>
<td>Last Modified Date</td>
<td>The date when the work order was last modified.</td>
</tr>
<tr>
<td>Last Viewed Date</td>
<td>The date when the work order was last viewed.</td>
</tr>
<tr>
<td>Latitude</td>
<td>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.</td>
</tr>
<tr>
<td>Line Items</td>
<td>(Read Only) The number of work order line items on the work order.</td>
</tr>
<tr>
<td>Location</td>
<td>The location associated with the work order. For example, a work site.</td>
</tr>
<tr>
<td>Longitude</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Maintenance Plan</td>
<td>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.</td>
</tr>
<tr>
<td>Milestone Status</td>
<td>A milestone is a step in an entitlement process. It can have one of three statuses: Compliant, Open Violation, and Closed Violation. If an entitlement process applies to a work order, this field appears. To learn more, see Milestone Statuses.</td>
</tr>
<tr>
<td>Milestone Status Icon</td>
<td>An icon that corresponds to the milestone status.</td>
</tr>
<tr>
<td>• Compliant</td>
<td></td>
</tr>
<tr>
<td>• Open Violation</td>
<td></td>
</tr>
<tr>
<td>• Closed Violation</td>
<td></td>
</tr>
<tr>
<td>Minimum Crew Size</td>
<td>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’re 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.</td>
</tr>
<tr>
<td>Owner</td>
<td>The work order’s assigned owner.</td>
</tr>
<tr>
<td>Parent Work Order</td>
<td>The work order’s parent work order, if it has one.</td>
</tr>
<tr>
<td>Tip: View, create, and delete a work order’s child work orders in the Child Work Orders related list.</td>
<td></td>
</tr>
<tr>
<td>Postal Code</td>
<td>The postal code where the work order is completed. Maximum length is 20 characters.</td>
</tr>
<tr>
<td>Price Book</td>
<td>The price book associated with the work order. Adding a price book to the work order lets you assign different price book entries (products) to the work order’s line items. This field is only available if products are enabled.</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority of the work order. The picklist includes the following values, which can be customized:</td>
</tr>
<tr>
<td>• Low</td>
<td></td>
</tr>
<tr>
<td>• Medium</td>
<td></td>
</tr>
<tr>
<td>• High</td>
<td></td>
</tr>
<tr>
<td>• Critical</td>
<td></td>
</tr>
<tr>
<td>Product Service Campaign</td>
<td>The product service campaign associated with the work order.</td>
</tr>
<tr>
<td>Product Service Campaign Item</td>
<td>The product service campaign item associated with the work order.</td>
</tr>
<tr>
<td><strong>Field</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Recommended Crew Size</td>
<td>The recommended number of people on the service crew assigned to the work order.</td>
</tr>
<tr>
<td>Record Type</td>
<td>The record type associated with the work type.</td>
</tr>
<tr>
<td>Return Order</td>
<td>The return order associated with the work order.</td>
</tr>
<tr>
<td>Return Order Line Item</td>
<td>The return order line item associated with the work order.</td>
</tr>
<tr>
<td>Root Work Order</td>
<td>(Read Only) The top-level work order in a work order hierarchy. Depending on where a work order lies in the hierarchy, its root can be the same as its parent.</td>
</tr>
<tr>
<td>Service Appointment Count</td>
<td>The number of service appointments on the work order.</td>
</tr>
<tr>
<td>Service Contract</td>
<td>The service contract associated with the work order.</td>
</tr>
<tr>
<td>Service Report Language</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>To appear as an option in the Service Report Language field, a language must be set up in Translation Workbench or be one of the Salesforce 18 fully supported languages. Service report field names are translated, but rich text field names, service report section names, and text field values such as service notes aren’t translated.</td>
</tr>
<tr>
<td>Service Report Template</td>
<td>The service report template that the work order’s service reports uses.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This field stays blank unless you update it on the work order. So to find out which template the work order’s service reports uses, check its work type.</td>
</tr>
<tr>
<td>Service Territory</td>
<td>The service territory where the work order is taking place.</td>
</tr>
<tr>
<td>Start Date</td>
<td>The date when the work order goes into effect. This field is blank unless you set up automation to populate it. See the example for a workflow rule that configures this field.</td>
</tr>
<tr>
<td>State</td>
<td>The state where the work order is completed. Maximum length is 80 characters.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| Status                | The status of the work order. The picklist includes the following values, which can be customized:  
  • New—Work order was created, but there hasn’t yet been any activity.  
  • In Progress—Work has begun.  
  • On Hold—Work is paused.  
  • Completed—Work is complete.  
  • Cannot Complete—Work couldn’t 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 doesn’t affect the status of its work order line items or associated service appointments. |
| Status Category       | The category that each status value falls into. The Status Category field has eight default values: seven values that 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 can decide that it belongs in the On Hold category.  
  To learn which processes reference Status Category, see How are Status Categories Used? |
| Stopped               | Indicates that the milestone countdown has been paused. |
| Stopped Since         | The time the milestone countdown was paused. |
| Street                | The street number and name where the work order is completed. |
| Subject               | The subject of the work order. Describe the nature and purpose of the job to be completed. For example: annual on-site well maintenance. The maximum length is 255 characters. |
| Subtotal              | (Read Only) The total of the work order line items’ subtotals before discounts and taxes are applied. |
| Suggested Maintenance Date | The suggested date that the work order is completed. When the work order is generated from a maintenance plan, this field is automatically populated based on the maintenance plan’s settings. |
| Tax                   | The total tax on the work order. For example, in a work order whose total price is $100, enter $10 to apply a 10 percent tax. You can enter a number with or without the currency symbol and you can use up to two decimal places. |
| Total Price           | (Read Only) The total of the work order line items’ price after discounts but before tax is added. |
### Field Service

#### Work Order Line Item Fields for Field Service

Work order line items have the following fields. Sometimes you can’t see or edit certain fields because of your page layout and field-level security settings.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>The address of the line item. The line item inherits its address from its parent work order, but it can also be updated manually.</td>
</tr>
<tr>
<td>Asset</td>
<td>The asset associated with the line item. If your org uses hierarchical assets (available after Spring ’16), you sometimes want to link a work order’s line items with different assets. For this reason, line items don’t automatically inherit their parent work order’s asset value.</td>
</tr>
<tr>
<td>City</td>
<td>The city where the line item is completed. Maximum length is 40 characters.</td>
</tr>
<tr>
<td>Country</td>
<td>The country where the line item is completed. Maximum length is 80 characters.</td>
</tr>
<tr>
<td>Currency ISO Code</td>
<td>The ISO code for any currency allowed by the organization. Available only for Salesforce orgs with the multicurrency feature enabled.</td>
</tr>
</tbody>
</table>

---

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

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

2. Add a New Field Update workflow action:
   - Under Field to Update, select *Start Date*.
   - Under Date Options, select the option to use a formula and enter the formula `NOW()`.

3. Save and activate your rule.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The description of the line item. We recommend describing the steps for a user to follow to mark the line item Completed.</td>
</tr>
<tr>
<td>Discount</td>
<td>The percent discount to be applied to the line item. You can enter a number with or without the percent symbol and you can use up to two decimal places.</td>
</tr>
<tr>
<td>Duration</td>
<td>The estimated time required to complete the line item. Specify the duration unit in the Duration Type field. <strong>Note:</strong> 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.</td>
</tr>
<tr>
<td>DurationInMinutes</td>
<td>The estimated time required to complete the line item, in minutes. This field is for internal use.</td>
</tr>
<tr>
<td>Duration Type</td>
<td>The unit of the duration: Minutes or Hours.</td>
</tr>
<tr>
<td>End Date</td>
<td>The date when the line item is completed.</td>
</tr>
<tr>
<td>Geocode Accuracy</td>
<td>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.</td>
</tr>
<tr>
<td>Is Closed</td>
<td>Indicates whether the line item is closed. Changing the line item's status to Closed causes this checkbox to be selected in the user interface.</td>
</tr>
<tr>
<td>Is Generated From Maintenance Plan</td>
<td>Identifies whether the work order line item is generated from a maintenance plan.</td>
</tr>
<tr>
<td>Last Referenced Date</td>
<td>The date when the line item was last modified. Its label in the user interface is Last Modified Date.</td>
</tr>
<tr>
<td>Last Viewed Date</td>
<td>The date when the line item was last viewed.</td>
</tr>
<tr>
<td>Latitude</td>
<td>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.</td>
</tr>
<tr>
<td>Line Item Number</td>
<td>An auto-generated number that identifies the line item.</td>
</tr>
<tr>
<td>List Price</td>
<td>The price of the line item (product) as listed in its corresponding price book entry. If a product isn't specified, the list price defaults to zero. (Read only)</td>
</tr>
<tr>
<td>Location</td>
<td>A location associated with the work order line item. For example, a work site.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Longitude</td>
<td>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.</td>
</tr>
<tr>
<td>Maintenance Plan</td>
<td>The maintenance plan associated with the work order line item.</td>
</tr>
<tr>
<td>Minimum Crew Size</td>
<td>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’re using the managed package, the scheduling optimizer counts the number of service crew members on a service crew to determine whether it fits a line item’s minimum crew size requirement.</td>
</tr>
<tr>
<td>Order</td>
<td>The order associated with the line item. For example, you order replacement parts before you can complete the line item.</td>
</tr>
<tr>
<td>Parent Work Order Line Item</td>
<td>The line item’s parent line item, if it has one.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>The postal code where the line item is completed. Maximum length is 20 characters.</td>
</tr>
<tr>
<td>Pricebook Entry</td>
<td>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.</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority of the line item. The picklist includes the following values, which can be customized:</td>
</tr>
<tr>
<td></td>
<td>• Low</td>
</tr>
<tr>
<td></td>
<td>• Medium</td>
</tr>
<tr>
<td></td>
<td>• High</td>
</tr>
<tr>
<td></td>
<td>• Critical</td>
</tr>
<tr>
<td>Product</td>
<td>The product (price book entry) associated with the line item. This field’s lookup search only returns products that are included in the parent work order’s price book.</td>
</tr>
<tr>
<td>Product Service Campaign</td>
<td>The product service campaign associated with the work order line item.</td>
</tr>
<tr>
<td>Product Service Campaign Item</td>
<td>The product service campaign item associated with the work order line item.</td>
</tr>
<tr>
<td>Quantity</td>
<td>The line item’s quantity.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Recommended Crew Size</td>
<td>The recommended number of people on the service crew assigned to the line item.</td>
</tr>
<tr>
<td>Return Order</td>
<td>The return order associated with the work order line item.</td>
</tr>
<tr>
<td>Return Order Line Item</td>
<td>The return order line item associated with the work order line item.</td>
</tr>
<tr>
<td>Root Work Order Line Item</td>
<td>The top-level line item in a line item hierarchy. Depending on where a line item lies in the hierarchy, its root can be the same as its parent. (Read only)</td>
</tr>
<tr>
<td>Service Appointment Count</td>
<td>The number of service appointments on the work order line item.</td>
</tr>
<tr>
<td>Service Report Template</td>
<td>The service report template that the line item’s service reports 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.</td>
</tr>
<tr>
<td>Note: This field stays blank unless you update it on the line item. To find out which template the line item’s service reports uses, check its work type.</td>
<td></td>
</tr>
<tr>
<td>Service Territory</td>
<td>The service territory where the line item work is taking place.</td>
</tr>
<tr>
<td>Start Date</td>
<td>The date when the line item goes into effect.</td>
</tr>
<tr>
<td>State</td>
<td>The state where the line item is completed. Maximum length is 80 characters.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the line item. The picklist includes the following values, which can be customized:</td>
</tr>
<tr>
<td>• New—Line item was created, but there’s no activity yet.</td>
<td></td>
</tr>
<tr>
<td>• In Progress—Work has begun.</td>
<td></td>
</tr>
<tr>
<td>• On Hold—Work is paused.</td>
<td></td>
</tr>
<tr>
<td>• Completed—Work is complete.</td>
<td></td>
</tr>
<tr>
<td>• Cannot Complete—Work couldn’t be completed.</td>
<td></td>
</tr>
<tr>
<td>• Closed—All work and associated activity is complete.</td>
<td></td>
</tr>
<tr>
<td>• Canceled—Work is canceled, typically before any work began.</td>
<td></td>
</tr>
<tr>
<td>Status Category</td>
<td>The category that each status value falls into. The Status Category field has eight default values: seven values that are identical to the default Status values, and a None value for statuses without a status category.</td>
</tr>
<tr>
<td></td>
<td>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 can decide that it belongs in the On Hold category.</td>
</tr>
</tbody>
</table>
### Work Type Fields for Field Service

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto-Create Service Appointment</td>
<td>Select to automatically create service appointments on work orders or work order line items that use the work type. Note:</td>
</tr>
<tr>
<td></td>
<td>- 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, or by updating the Due Date Offset field on a work type (a Field Service managed package feature).</td>
</tr>
<tr>
<td></td>
<td>- 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.</td>
</tr>
<tr>
<td></td>
<td>- 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.</td>
</tr>
</tbody>
</table>

**Editions**

- Available in: Salesforce Classic and Lightning Experience
- The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The description of the work type. Try to add details about the task or tasks that this work type represents.</td>
</tr>
<tr>
<td>Duration Type</td>
<td>The unit of the Estimated Duration: Minutes or Hours.</td>
</tr>
<tr>
<td>Estimated Duration</td>
<td>The estimated length of the work. The estimated duration is in minutes or hours based on the value selected in the Duration Type field.</td>
</tr>
<tr>
<td>Exact Appointments</td>
<td>If selected, service appointment time slots reflect the time needed for the work rather than a time window in which the work occurs. This setting is useful, for example, for work types such as office or showroom visits that have an exact start time.</td>
</tr>
<tr>
<td>Minimum Crew Size</td>
<td>The minimum crew size allowed for a crew assigned to records using the work type.</td>
</tr>
<tr>
<td></td>
<td>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 record’s minimum crew size requirement.</td>
</tr>
<tr>
<td></td>
<td>💡 <strong>Note:</strong> This field is hidden for all users by default. To use it, update its field-level security settings and add it to your work type page layouts.</td>
</tr>
<tr>
<td>Name</td>
<td>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.”</td>
</tr>
<tr>
<td>Recommended Crew Size</td>
<td>The recommended number of people on the service crew assigned to the record using this work type.</td>
</tr>
<tr>
<td></td>
<td>💡 <strong>Note:</strong> This field is hidden for all users by default. To use it, update its field-level security settings and add it to your work type page layouts.</td>
</tr>
<tr>
<td>Service Report Template</td>
<td>The service report template associated with the work type.</td>
</tr>
<tr>
<td></td>
<td>If you choose not to specify a service report template on a work order, it uses the service report template listed on its work type. If the work type doesn’t list a template or no work type is specified, the work order uses the default service report template. The same is true for work order line items.</td>
</tr>
</tbody>
</table>
Field Service Mobile App

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

Review this table to learn what the app has to offer. If you aren’t yet using Field Service in Salesforce, see Set Up Field Service before getting started with the app.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offline capability</td>
<td>The app works offline, so mobile workers can complete their work even with limited or no network connectivity.</td>
</tr>
<tr>
<td>Push notifications</td>
<td>Push notifications help your mobile workforce stay up to date, making sure they never miss an important event.</td>
</tr>
<tr>
<td>Custom branding</td>
<td>Brand the app to give it your company’s look and feel.</td>
</tr>
<tr>
<td>Configurable layouts</td>
<td>Flexible layouts let you choose what record information to display to your users.</td>
</tr>
<tr>
<td>Configurable actions</td>
<td>Configure quick actions to help users quickly complete common tasks, pass record data to other apps, and build flows to guide your team through collecting information and finalizing jobs.</td>
</tr>
<tr>
<td>Chatter</td>
<td>Communicate with dispatchers, partners, and customers using Chatter.</td>
</tr>
<tr>
<td>Site user access</td>
<td>Give members of your Experience Builder site—like contractors—custom access to your field service operation.</td>
</tr>
<tr>
<td>Geolocation tracking</td>
<td>Keep tabs on service resources and enable smarter scheduling with resource geolocation tracking.</td>
</tr>
<tr>
<td>Service reports</td>
<td>Create previewable service reports summarizing field service visits. Seal the deal by capturing customers’ signatures on the reports.</td>
</tr>
<tr>
<td>Salesforce Knowledge integration</td>
<td>Attach specs, instructions, and best practices to work orders and work order line items to keep relevant information at your team’s fingertips.</td>
</tr>
<tr>
<td>Work order overview screen</td>
<td>Help your team quickly find the information they need to complete assignments. The work order</td>
</tr>
</tbody>
</table>
### Feature

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview screen</td>
<td>overview screen displays information about a work order’s service appointments, line items, asset history, and more.</td>
</tr>
<tr>
<td>Find nearby work</td>
<td>Help your team find other work orders in the same location so they can take care of nearby jobs.</td>
</tr>
<tr>
<td>Inventory tab</td>
<td>Let your team manage track consumption, request products, and view their inventory from the app.</td>
</tr>
<tr>
<td>Appointment Assistant</td>
<td>Give customers temporary, live tracking of Salesforce Field Service mobile workers.</td>
</tr>
</tbody>
</table>

---

### Field Service Mobile App Requirements

Learn about the mobile app’s device, connectivity, edition, and license requirements.

#### Devices

<table>
<thead>
<tr>
<th>Supported Devices</th>
<th>Recommended Devices</th>
<th>Supported Mobile operating system</th>
<th>Other Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Android:</strong> All major Android devices are supported.</td>
<td><strong>Android:</strong> The app is optimized for Samsung and Google Pixel devices.</td>
<td>Version 8.1 and later</td>
<td>Google Play Services version 17.0.0 and later</td>
</tr>
<tr>
<td><strong>iOS:</strong></td>
<td><strong>iOS:</strong></td>
<td>iOS 13.4 or later</td>
<td>Minimum web version is 90.0</td>
</tr>
<tr>
<td>• iPhone 6S</td>
<td>• iPad 6+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• iPhone 6S Plus</td>
<td>• iPad Air 3rd generation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• iPhone SE 1st generation</td>
<td>• iPad Mini 5th generation+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• iPhone 7</td>
<td>• iPad Pro 9.7&quot;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• iPhone 7 Plus</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

Field Service mobile users need the Field Service Mobile user license to access the app.
Because we enhance functionality with every release, we support the latest version of the Field Service app available in Google Play or the App Store only.

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

Salesforce Customer Support uses commercially reasonable efforts to troubleshoot issues with the Field Service app, provided:

- A user’s device meets current minimum platform requirements
- Field Service app users have the most recent version installed

### Wireless Connection

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

<table>
<thead>
<tr>
<th>Supported Devices</th>
<th>Recommended Devices</th>
<th>Supported Mobile operating system</th>
<th>Other Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>• iPhone 8</td>
<td>• iPad Pro 10.5”</td>
<td>• iPad Pro 10.5”</td>
<td></td>
</tr>
<tr>
<td>• iPhone 8 Plus</td>
<td>• iPad Pro 11” all models</td>
<td>• iPad Pro 11” all models</td>
<td></td>
</tr>
<tr>
<td>• iPhone X</td>
<td>• iPad Pro 12.9” 2nd generation+</td>
<td>• iPad Pro 12.9” 2nd generation+</td>
<td></td>
</tr>
<tr>
<td>• iPhone XS</td>
<td>• iPad SE 2nd generation</td>
<td>• iPad SE 2nd generation</td>
<td></td>
</tr>
<tr>
<td>• iPhone XS Max</td>
<td>• iPhone 7+</td>
<td>• iPhone 7+</td>
<td></td>
</tr>
<tr>
<td>• iPhone XR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• iPhone 11</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• iPhone 11 Pro</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• iPhone 11 Pro Max</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• iPhone SE 2nd generation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• iPad 5th generation or later models</td>
<td>• iPad Air 2</td>
<td>• iPad Air 2</td>
<td></td>
</tr>
<tr>
<td>• iPad Air 2</td>
<td></td>
<td>• iPad Air 2</td>
<td></td>
</tr>
<tr>
<td>• iPad Air 3rd generation</td>
<td></td>
<td>• iPad Air 3rd generation</td>
<td></td>
</tr>
<tr>
<td>• iPad Mini 4 or later models</td>
<td>• iPad Pro all models</td>
<td>• iPad Pro all models</td>
<td></td>
</tr>
<tr>
<td>• iPad Pro all models</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Field Service Mobile App Considerations

Review considerations for the Field Service mobile app for Android and iOS.

Service Appointments

- The Recently Viewed service appointments list view shows all service appointments assigned to a user even if the user hasn’t viewed them.
- Service appointment list views of more than 2000 don’t display labels as dropdown values on the mobile app’s Schedule tab.
- The schedule list isn’t refreshed unless the ScheduleUpdateFreq timeout value is reached.

Service Reports

- Users can’t select a template when creating a service report in the mobile app. Instead, a template is selected based on this order:
  1. The work order template
  2. The work type template
  3. The standard template
- Service report previews have these limitations:
  - Although users can make an offline request to generate a service report, the final PDF is created only when the user’s device is online.
  - The app doesn’t automatically get the latest data before generating a service report preview, so data in service report previews can be out of date. This limitation applies to online and offline service report previews.
  - If a reference field exceeds the maximum priming depth of 2, it isn’t populated.
  - Formula field values can be inaccurate in a preview because they aren’t dynamically calculated.
  - Roll-up summary fields are blank.
  - Related lists behave differently in mobile previews.
    - The order of records in related lists can differ between the preview and the printed report.
    - If a service report template includes a related list, the list populates only if it’s on the page layout of the record that the service report is being generated for.
    - On the printed report, all related lists are printed. In the mobile preview, a related list must be on the preview page layout to appear on the preview.
  - These elements aren’t visible:
    - Cases related list
    - Headers and footers
    - Organization fields
    - Certain data fields
    - Images in rich text fields on a service report template or service appointment, work order, or work order line item page layout
- The Digital Signature object Place field isn’t supported.
- Text fields and rich text area fields are truncated to 255 characters. This limitation occurs on rich text area fields, other types of text fields, standard fields, and custom fields.
Inventory Management

- A maximum of 1,000 products are shown in inventory lists. This number is also the maximum number of inventory items that can be primed.
- If you use the setting Enable Multiple Locations, the Add and Add All buttons are removed from the Product Required screen. Instead, manually add the required products for multiple inventory locations.

Chatter

- The Feed tab in iOS is supported only on the work order, work order line item, service appointment, and case objects. The Feed tab in Android is supported only on the work order, work order line item, and service appointment objects.
- (Android only) Chatter is disabled when the app doesn’t have internet connectivity.

Knowledge

- (iOS only) If images in knowledge articles are hosted outside of Salesforce, they display normally. Images uploaded to Salesforce don’t load correctly. As an alternative, we recommend using an image link that users can open themselves. You can avoid this issue by selecting the option to use POST requests for cross-domain sessions. Find this option on the Session Settings page in Setup.
- (iOS only) Some knowledge articles of supported UI languages, such as Japanese, don’t show in the Field Service mobile app.
- (Android only) The Knowledge Article action isn’t visible on the Work Order Overview screen. View knowledge articles using the related list.
- (Android only) In Knowledge Article details, field names such as Title don’t display on Android devices.
- If a device is running in any of Salesforce’s 26 supported languages, the app automatically translates knowledge articles to that language. If the device isn’t running in a supported language, no knowledge articles are shown.

Barcode Scanner

- The barcode scanner is compatible only with 1D serial barcodes and 2D QR codes.
- In barcode scanning, the Android app uses the Zebra Crossing library. The iOS app uses Apple’s built-in libraries, except for AVMetadataObjectTypeFace. For details, see AVMetadataObjectType.

Briefcase Builder

- Related lists don’t work offline when the records are primed with Briefcase Builder.
- The Product object in the Inventory tab isn’t supported.

Flows

- Select formula functions and operators are available offline. See Available Formula Functions and Operators on page 336.
- Backslash \ characters and single quotes (’ ) aren’t supported in flow formula fields.
- Screen flows launched using quick actions or app extensions aren’t supported.
- Email alert actions aren’t supported in flows.
- Paused flows aren’t supported. If you leave a flow in progress and exit the Field Service mobile app, you can’t resume the flow where you left off.
- The wasSelected operator can’t be used in decisions.
- For eval() functions, the boolean values true and false are case-sensitive.
• Hardcoded ID values must be 18 digits long. 15-digit values aren’t supported.
• Apex classes aren’t supported in flows.
• Fault connectors aren’t supported in flows.
• When uploading images in flows, the content document IDs parameter isn’t supported. Admins must create a flow confirmation screen to show which images were uploaded. Videos and other file types aren’t supported.
• Flows don’t support the following elements. Adding these elements to a flow causes it to display an error.
  – Lightning components (except for file upload)
  – Output parameters on file upload except for “Uploaded File Names”
  – Choice resources with Display Text Input enabled
  – Actions with output parameters

  **Note:** Some flows that have actions with output parameters don’t cause an error immediately, but they’re still not supported.

• Flows don’t support the Section screen component.
• Flow picklists that include a default value aren’t supported. If you choose a default value, it isn’t shown as the default value in the picklist and isn’t used in the mobile flow. To work around this issue, add a separate choice that is a constant equal to the value of the default value in the object’s screen picklist value.
• In flows, radio button fields that aren’t required allow the user to select from a list of values, including a —None— option. —None— is a null value that allows the field to be optional.
• Flow picklists use the values of the choice set from which the default value is assigned.
• Flow record variables require record fields to be accessed through their field API names. Use of field relationship names isn’t supported.
• Flow text areas have a 2,000-character limit.
• Flow record variables require record fields to be accessed through their field API names. Use of field relationship names isn’t supported.
• Flow text areas have a 2,000-character limit.
• Using semicolons when defining user choices in flow checkbox groups and multi-select picklists isn’t supported. If you use semicolons for user choices, the data doesn’t render accurately.
• Record choice sets don’t retain the value that is selected. A record choice set variable can’t be used to determine what selection was made. However, the component used to make the selection, such as a picklist, saves that value for later use.
• Custom Logic and the or operator within Get elements and the record choice set variable aren’t supported in the Field Service mobile app.
• When using a flow that has a subflow, returning to the main flow from the subflow using the Previous button discards entered data.
• Recently added records from the Field Service org don’t show in mobile flows when using Flow Record Choice Set to query from these records. To resolve this issue, log out and then back into the mobile app.
• Flows installed on the Field Service mobile app using a managed package result in an error. We recommend using an unmanaged package instead. This error only occurs on the mobile app.
• HTML text isn’t supported in Flow builder.
• Mobile flows support only these global values:
  – $Flow.CurrentDateTime
  – $Flow.CurrentDate
  – $GlobalConstant.EmptyString

• Flows on desktop and mobile don’t support picklist default values that are derived from an object’s picklist values.
• If a default value is assigned in the picklist component of the flow, then the values are populated from the default picklist field value and not the picklist choice set assigned to it.
• Running a flow as another user isn’t supported.
• Only the following assignment operations for collections are supported:
  – Add
  – Equal
  – Equals Count
• Picklist values are expanded if there are five or fewer values or if the picklist is the only component on that particular flow screen. Otherwise, values are displayed as a dropdown list.
• When a Record/Dynamic Choice Set is used as a data list for a single item picklist in a flow, the screen doesn’t display correctly. To work around this behavior, add additional items to the picklist.
• Flows can have up to nine conditions in a decision element.
• Record Choice Sets created using the AttachedContentDocuments objects on a Work Order or any object that supports it don’t work in the mobile app. The mobile app doesn’t support showing a related list for files within a flow.
• When using the NOW() formula in fields, create a separate formula resource that resolves to NOW(), and use that resource in the validation field. This ensures the latest timestamp is used on the flow launch.
• Flows retain variable values after they’re entered. Clicking the Back button in a flow doesn’t clear the value.
• In field service mobile app flows that use the Create Record element, the ID populates with the app’s cache ID. This cache ID isn’t the newly created record’s ID. To access the cache ID in a Flow on the app, you must turn on the option "Use separate resources, and literal values" in the Create Record element.
• Chaining of formulas in the same flow step isn’t supported.
• Collection Choice Sets aren’t supported in flows.

Lightning App Extensions
• The Salesforce app can launch and accept parameters for Visualforce pages exposed as a Lightning Page Tab. However, the Lightning Page Tab name can’t have any spaces in it.

Work Orders
To numerically sort work order line item records, use this format:
• Add a zero, if needed, to create a two-digit number. For example, 02 correctly sorts before 12.
• If 100 items or more are required, create a text field and add numeric values prepended by zeros to create a three-digit number. Then, sort on that field. For example, 002 and 012 correctly sorts before 100. However, Field Service on desktop does not support preceding zeros. To sort correctly on desktop, define the sort order in 10s on a number field of a custom object, for example, 10, 20, 30 etc.

General Limitations
• When displaying related lists in the mobile app, such as the work order line items for a work order, no more than 200 items are displayed due to performance considerations.
• Plain text fields no longer support rich text or HTML content.
• Time fields without a date aren’t supported in the Field Service mobile app.
• Under the profile tab, only 10 resource absence records are displayed.
• The Notes related list isn’t supported.
• Under the Files related list, only 50 files are displayed.
• Visualforce pages aren’t supported in the app, including actions and Visualforce components on page layouts.
• Lightning Component and custom override quick actions aren’t supported.
• Lookup filters aren’t supported.
• Enhanced notes aren’t supported.
• Users aren’t able to change the ownership of objects like Service Appointments or Work Orders.
• In some countries, certain mapping features, such as driving directions and ETA, aren’t supported for Apple or Google maps.
• Google Maps is the only supported mapping application for features in the Field Service app.
• If a user’s device is offline, its location data can’t be accessed. When the device is back online, its last known location is sent to Salesforce.
• The Contact Card section on the Work Order Overview screen displays the contact associated with the Service Appointment, rather than the Work Order. To view the Contact Card, make sure to populate the Contact field of the Service Appointment.
• Paging isn’t supported for SOQL queries. The maximum number of records a query can return is 2,000.
• Formulas aren’t supported on the Details tab.
• If a default list view is selected, all list views that a user has access to display in the app. There’s no way to hide or suppress specific list views in the Field Service app.
• If a selected picklist value is inactive, it isn’t shown in the Field Service app, but it’s shown on the Field Service desktop application.
• If the launch field value passes a URL from a formula field value, App Extensions throw an error that a required app isn’t installed.
• Default values in Time Sheet Entry fields don’t populate on the Field Service mobile app.
• If the currency field is updatable, it’s displayed as a number without a currency symbol and obeys the field decimal places setting. However, if the currency field isn’t updatable, it’s displayed as a number with a currency symbol and two decimal places only.
• When a currency field supports multiple currencies, only the set amount shows in the mobile app. Currency conversions aren’t displayed.
• When a resource absence is created, the default record type is automatically set if the record type field isn’t on the page layout. To work around this issue, add the Record Type field to the resource absence page layout.
• User Profile on the User page and RecordType on the Work Order Details page aren’t supported as layout objects, but they can appear as links in the Field Service mobile app. Clicking these objects shows an error message and a blank screen.
• Quick action values aren’t updated when working offline.
• Notification settings use the mobile settings assigned to the user initiating the request, not the user receiving the request.
• Quick actions can override the permission “accurate record dates for offline”, causing inaccurate logging after the app comes back online.
• If an object hasn’t been primed or previously accessed, it isn’t visible from another object’s UI. This includes newly created records from within the app.

Android Only
• The Event Insights card is available only on Android devices.
• Some device makers prohibit using commas as a decimal separator in their standard app keyboards. To work around this issue, download a new keyboard app, or copy and paste the comma from another input in the application.
• By default, you must use a Lightning app extension to automatically open records in the Salesforce app.
• Features that use Google services like push notifications and Google maps aren’t supported in China.
• Related list file previews are limited to .pdf, .html, and .txt file types. To view other file types you must have third-party apps installed. For example, to view spreadsheets you must download an application like Google Sheets.
• Dark mode isn’t supported.
• Some Android devices running Android 11 reset flow states when the device screen is rotated. To avoid this issue, lock the device’s screen rotation.

iOS Only
• Quick actions with default values can take up to a minute to render during poor or unstable network connectivity.
• Custom list views can take a minute or more to sync.
• Only plain text is supported for rich text fields.
• Default values aren’t available in offline mode.
• Lookup fields like Account aren’t supported on the Schedule, Work Order, and Work Order Line Item tabs.
• Custom override on actions isn’t supported, including custom override on lookup logic.
• Apple limits what apps can do while in the background or when the device is locked, which is important when priming. Always prime to completion before going offline.
• In iOS14 and later, the Field Service mobile app doesn’t comply with default app settings you set. For example, if you choose Outlook or Gmail for email, Field Service ignores the setting and instead uses the iOS Mail app, which is the Field Service default.
• Actions in landscape orientation aren’t supported. Actions are only shown in portrait mode.
• iOS has a 24-hour format setting that overrides other time settings regardless of the device’s region or locale. Some components, such as the date/time picker and flow fields, are impacted by this format override.

Field Service Mobile Security

Protect and safely store data that is gathered from the Field Service mobile app (Android and iOS).

The Field Service App is built with the Salesforce Mobile SDK. The Salesforce Mobile SDK provides a set of low-level services that include security and authentication to applications that are built using this framework.

For information about data protection regulations and Service Cloud, see Data Protection and Privacy.

Local Encryption at Rest

Encryption boosts the security of your customers’ data and helps you comply with privacy policies, regulatory requirements, and contractual obligations. Shield Platform Encryption and Field Audit Trail are supported for the following fields on work orders, work order line items, and service appointments:
• Description
• Subject
• Address (Street and City only)

To encrypt these fields, add them to your Encryption Policy in Setup. The Subject and Address fields support both probabilistic and deterministic encryption, while the Description field supports only probabilistic encryption. If Field Audit Trail is enabled, you can set field history data retention policies for the fields whose data you want to retain.

Important:
• Encryption is not supported for the Latitude and Longitude fields, which could be used to pinpoint an address.
• When you encrypt a field, existing values aren’t encrypted. Contact Salesforce for help with encrypting existing data.
### Table 1: Offline Data

<table>
<thead>
<tr>
<th><strong>Salesforce App</strong></th>
<th><strong>Field Service App</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Offline data is stored using Core Data, and encrypted using NSFileProtectionCompleteUntilFirstUserAuthentication. This authentication dictates how passcodes are exposed internally to access the offline data. The passcode for the offline data is removed from the local keychain when Salesforce is closed or running in the background. Salesforce offline data is only accessible when the app is open and in the foreground.</td>
<td>Data is stored using the Sqlcipher provider for Sqlite3. Cached data is purged based on a least-recently-used cache policy.</td>
</tr>
</tbody>
</table>

### Table 2: Files and Attachments

<table>
<thead>
<tr>
<th><strong>Salesforce App</strong></th>
<th><strong>Field Service App</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Files and attachments are stored on the device's file system in a double-encrypted format. The device's hardware encryption encrypts the files while the device is locked. In addition, Salesforce encrypts using an AES algorithm (128-bit block size and 256-bit key size). When the file is viewed, there's a temporary unencrypted copy kept on the file system (removed when the 'viewing' operation is complete).</td>
<td>Files are stored in an iOS sandboxed directory and are also encrypted by application encryption. While viewing, files are temporarily unencrypted in another sandbox directory, but are erased when the app is in the background or when the viewer is dismissed. Also, the temp directory is cleaned when the application is launched.</td>
</tr>
</tbody>
</table>

### Table 3: Chatter Feed Data

<table>
<thead>
<tr>
<th><strong>Salesforce App</strong></th>
<th><strong>Field Service App</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Feed data is stored using Core Data, and encrypted using NSFileProtectionCompleteUntilFirstUserAuthentication. This authentication dictates how passcodes are exposed internally to access the feed data. The passcode for the feed data is removed from the local keychain when Salesforce is closed or running in the background. Salesforce feed data is only accessible when the app is open and in the foreground. Also, the feed data storage is time-based. The feed cache purges items older than one week, unless the remainder of feed items is fewer than 25 items. Also feeds that have more than 500 items have their excess items removed.</td>
<td>All Chatter feed data is stored with the Sqlcipher provider for Sqlite3. Cached data is purged based on a least-recently-used cache policy. In addition, Feed functionality is provided by a shared component, which makes the experience on iOS and Android the same.</td>
</tr>
</tbody>
</table>

### Server-Side Encryption at Rest

Salesforce provides encryption abilities for data at rest on the Salesforce servers. The Platform Encryption feature allows customers to create policies at the field-level to encrypt sensitive data. This feature supports custom objects, and a subset of standard fields on standard objects. As of the time of this writing, encryption is supported for some fields on the following standard objects: Account, Contact, Opportunity, Lead, Case, and Case Comment.

Custom fields on these or other objects can be encrypted assuming that they use data types that can be encrypted.
Encrypting Data in Transit

Data transmitted to and from the Salesforce server is protected using SSL. Authentication, access controls, and digital signatures are protected using SHA-256.

User Authentication

<table>
<thead>
<tr>
<th>Salesforce App</th>
<th>Field Service App</th>
</tr>
</thead>
<tbody>
<tr>
<td>the Salesforce mobile app supports certificate-based login, whereby the customer can push a unique certificate to the device using Mobile Device Management (MDM). The certificate can authenticate the user to Salesforce. Alternatively, Salesforce’s Lightning Login feature has multifactor authentication from the Salesforce Authenticator app. The factors are:</td>
<td>Certificate-based authentication is a function of the Identity Provider. Files are stored in the application directory and are encrypted using application encryption. The files are decrypted while viewing and deleted after the view operation is complete. The directory is cleared when the user logs out.</td>
</tr>
<tr>
<td>• What you have: The mobile device</td>
<td>• What you have: The mobile device</td>
</tr>
<tr>
<td>• What you are: If fingerprint biometrics is enabled on the device</td>
<td>• What you are: If fingerprint biometrics is enabled on the device</td>
</tr>
<tr>
<td>• What you know: If the device is enabled for PIN-based login. Lightning Login is only enabled on devices that have either PIN or fingerprint enabled.</td>
<td>• What you know: If the device is enabled for PIN-based login. Lightning Login is only enabled on devices that have either PIN or fingerprint enabled.</td>
</tr>
</tbody>
</table>

Trusted IP Ranges

Logins to the Field Service mobile app can be restricted to specific trusted IP ranges, which is also true for the Salesforce mobile app. You can implement this using a Virtual Private Network (VPN) solution on mobile devices. After logging in to VPN, users can log in to the app. Afterwards, the user can log in to Salesforce.

Device Identification

Salesforce is piloting a new feature to track device fingerprints accessing the Salesforce services. The feature supports the ability to see who logged in with a particular device and to revoke access to specific devices.

Handling Sensitive Data

To prevent leakage of sensitive data, Salesforce apps support four settings to limit data exfiltration on a mobile device.

- **DISABLE_EXTERNAL_PASTE**: Allows users to copy-and-paste data within the app, but prevents users from pasting data copied from the app to other apps or OS features.
  
  **Note**: This feature does not work on Samsung phones (and other manufacturers of Android phones) where a custom clipboard implementation is used.

- **FORCE_EMAIL_CLIENT_TO**: If a user taps on an email action within the app, the user is directed to the email app specified in the attribute value.

- **SHOW_OPEN_IN**: Prevents users from opening files in applications outside of the app.

- **SHOW_PRINT**: Used to disable printing from within the app.
The following table shows the level of support for these features in the Field Service mobile app as well as the Salesforce mobile app.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Supported on Field Service Mobile</th>
<th>Supported on Salesforce Mobile</th>
</tr>
</thead>
<tbody>
<tr>
<td>DISABLE_EXTERNAL_PASTE</td>
<td>✔ (Default: FALSE)</td>
<td>✔</td>
</tr>
<tr>
<td>FORCE_EMAIL_CLIENT_TO</td>
<td>✗</td>
<td>✔</td>
</tr>
<tr>
<td>SHOW_OPEN_IN</td>
<td>✔ (Default: TRUE)</td>
<td>✔</td>
</tr>
<tr>
<td>SHOW_PRINT</td>
<td>✗</td>
<td>✔</td>
</tr>
</tbody>
</table>

The Field Service Mobile app settings are non-restrictive by default. To change a setting from the default value, go to Setup. Enter Connected Apps in the Quick Find box, select Manage Connected Apps, then click the name of the Field Service connected app. Update the attribute from the Custom Attributes section on the connected app page.

**Mobile Device Management**

Salesforce provides an extra level of security compliance with the most popular Mobile Device Management (MDM) suites. Both Android and iOS, with an MDM, give you enhanced functionality for distribution and control over your users’ devices. The enhanced security functions, when you combine Salesforce with an MDM, include certificate-based authentication and automatic custom host provisioning.

<table>
<thead>
<tr>
<th>MDM</th>
<th>Supported on Field Service Mobile</th>
<th>Supported on Salesforce Mobile</th>
</tr>
</thead>
<tbody>
<tr>
<td>RequireCertAuth</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>AppServiceHosts</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>AppServiceHostLabels</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>OnlyShowAuthorizedHosts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ClearClipboardOnBackground</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Field Service Android and iOS Mobile App Comparison

Learn about the main feature differences between the Android and iOS versions of the Field Service mobile app.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Supported on Android</th>
<th>Supported on iOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Native deep linking to the Salesforce App</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Mentioning people and groups</td>
<td>✔️</td>
<td>✗</td>
</tr>
<tr>
<td>Video, image, and PDF posts</td>
<td>✔️</td>
<td>✗</td>
</tr>
<tr>
<td>Deleting posts</td>
<td>✔️</td>
<td>✗</td>
</tr>
<tr>
<td>Liking and bookmarking posts</td>
<td>✔️</td>
<td>✗</td>
</tr>
<tr>
<td>Offline posts</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Find work by location</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Products required</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>

Supported Data Types in the Field Service Mobile App

Learn which data types are supported in the Field Service mobile app for Android and iOS.

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Supported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Number</td>
<td>✔️</td>
</tr>
<tr>
<td>Formula</td>
<td>✔️</td>
</tr>
<tr>
<td>Roll-Up Summary</td>
<td>✗</td>
</tr>
<tr>
<td>Lookup Relationships</td>
<td>✗</td>
</tr>
<tr>
<td>External Lookup Relationship</td>
<td>✗</td>
</tr>
<tr>
<td>Checkbox</td>
<td>✔️ (Shows Yes/No.)</td>
</tr>
<tr>
<td>Currency</td>
<td>✔️</td>
</tr>
<tr>
<td>Date</td>
<td>✔️</td>
</tr>
<tr>
<td>Date/Time</td>
<td>✔️ (The following fields are not supported: Scheduled End, Scheduled Start, Arrival Window End, Arrival Window Start.)</td>
</tr>
<tr>
<td>Email</td>
<td>✔️</td>
</tr>
</tbody>
</table>
### Supported Data Types in the Field Service Mobile App

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Supported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geolocation</td>
<td>✔️</td>
</tr>
<tr>
<td>Number</td>
<td>✔️</td>
</tr>
<tr>
<td>Percent</td>
<td>✔️</td>
</tr>
<tr>
<td>Phone</td>
<td>✔️</td>
</tr>
<tr>
<td>Picklist</td>
<td>✔️ (Picklists with fewer than six options are shown in an expanded view.)</td>
</tr>
<tr>
<td>Picklist (Multiple Select)</td>
<td>✔️ (Picklists with fewer than six options are shown in an expanded view.)</td>
</tr>
<tr>
<td>Text</td>
<td>✔️</td>
</tr>
<tr>
<td>Text Area</td>
<td>✔️</td>
</tr>
<tr>
<td>Text Area (Long)</td>
<td>✔️</td>
</tr>
<tr>
<td>Text Area (Rich)</td>
<td>✔️</td>
</tr>
<tr>
<td>Text Area (Encrypted)</td>
<td>✔️</td>
</tr>
<tr>
<td>Time</td>
<td>❌ (Time fields without a date are not supported.)</td>
</tr>
<tr>
<td>URL</td>
<td>✔️</td>
</tr>
</tbody>
</table>
Download the Field Service Connected App

Before you configure user access and customize the Field Service mobile app, download the connected app.

The Field Service connected app is different from the actual Field Service mobile app, but equally important. The connected app provides push notifications, geolocation services, and other app settings related to service report generation and app customization. If your team uses mobile devices, open a new incognito/private browser window and download the connected app for Field Service. If you want to use a sandbox, change login.salesforce.com to test.salesforce.com

Note: Apple and Google Maps provide high-level route and ETA in the Field Service mobile app. To get this functionality, Android users must have the Apex Rest Services permission enabled for the mobile worker’s user profile. See Set Apex Class Access from the Class List Page. To get detailed driving directions, both iOS and Android users can click the Get Directions button. This links out to external mapping applications you have installed on your device.

Editions

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

Field Service mobile users need the Field Service Mobile user license to access the app.

User Permissions

To install connected apps and update user permissions:

- Customize Application
Give Users Access to the Field Service Mobile App

To give your mobile workforce access to the Field Service mobile app, set them up with the right user license and permissions. These steps also apply to Experience Builder site users.

1. Assign the Field Service Mobile permission set to the user.
2. Create a Field Service Mobile permission set.
   a. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
   b. Click New.
   c. Select the Field Service Mobile license from the picklist.
   d. Click Save.
   e. Click System Permissions, then click Edit.
   f. Select the Field Service Standard and Field Service Mobile system permissions.
   g. Click Save.
3. Customize the permission set’s object permissions.
   Click Object Settings, then click an object’s name to modify its permissions. Save your changes after modifying an object. At a minimum, app users need the following permissions. You can assign additional permissions to objects such as assets, accounts, and products, as you see fit.

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Permission Needed</th>
<th>Field Permission Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Read</td>
<td>Email, Name, Phone, Title</td>
</tr>
<tr>
<td>Service Appointment</td>
<td>Read, Edit</td>
<td>Address, Appointment Number, Contact, Created By, Created Date, Owner, Parent Record, Parent Record Type, Parent Record Status, Category, Scheduled Start, Scheduled End, Status, Work Type</td>
</tr>
<tr>
<td>Service Resource</td>
<td>Read, Edit</td>
<td>Active, User</td>
</tr>
<tr>
<td>Work Order</td>
<td>Read, Create, Edit</td>
<td>None</td>
</tr>
</tbody>
</table>

4. Assign the permission set to your mobile app users.
   a. Click Manage Assignments, and then click Add Assignments.
   b. Select all users who need the app permission set.
   c. Click Assign.
5. Make sure the user has the API Enabled system permission set enabled. This permission set is assigned from either the user profile or other permission set which includes the API Enabled system permission.
   a. Click System Permissions.
b. Click Edit.
c. Select API Enabled.
d. Click Save.

6. Create a service resource record for each user. For instructions, see Create Service Resources for Field Service.
   
   **Important:** To use the Field Service mobile app, each user needs Read access to their service resource record. If you have Service Resources set to Private in Sharing Settings, see Granting Access to Records with Manual Sharing for how to give your users Read access, or consider implementing sharing rules.

7. (Android only) Add Apex class access to the user profile for Google Maps functionality.
   a. From Setup, enter Profiles in the Quick Find box, then select Profiles.
   b. Select the profile for the users who require access to Google Maps.
   c. From the profile page, click Apex Class Access.
   d. Click Edit.
   e. Add the following Apex classes to the list of Enabled Apex Classes: GoogleApis_geo, GoogleApis_direction.
   f. Click Save.
Let Users Manage Inventory from the Field Service Mobile App

Customize your page layouts and user permissions so that your team can take care of inventory management tasks. For example, give mobile workers the ability to log product consumption, create product requests, and keep their service vehicle inventory current. Inventory management is supported on both Android and iOS.

Before getting started, get to know Salesforce inventory management terms and processes. See Set Up Your Field Service Inventory.

Show the Inventory Tab (Android and iOS)

Let users view and update their inventory, log inventory consumption, and request parts from the Inventory tab. To see the Inventory tab, app users must be active service resources who are associated with a mobile inventory location. They must have at least Read access to product items or product requests.

A location represents a physical area where products are stored. Because field service workers typically bring products with them in their vehicle, you can create a field location type to represent their inventory, such as a vehicle or toolbox.

1. From the full Salesforce site, click the Service Resources tab.
2. On a service resource, click Edit.
3. In the Location lookup field, enter a location that has both Inventory Location and Mobile Location selected.

   Note: If you don’t see the Location field, add it to your service resource page layout.

Because this service resource is associated with the location, the user sees the Inventory tab in the app.
Manage Inventory in the Field (Android and iOS)

To let service resources who are associated with a mobile inventory location manage their inventory, you create product items that represent the stock. Each product item is linked to a location, such as a van or warehouse, and to a specific inventory product. When you create product items, you can track inventory usage and restock when necessary.

**Note:** To search by a product code, it must be added to the Product Search Layout. Inventory lists in the Field Service mobile app will show up to 1,000 products.

1. On the Product Items tab in the full Salesforce site, create product items for the mobile inventory location associated with the service resource. For example, if Service Van 42 contains 30 batteries, create a product item associated with the Service Van 42 location and the Battery product. For more information, see Create Product Items to Represent Inventory.

2. To let your team create or update the product items representing their inventory, assign the object permissions listed in Create Product Items to Represent Inventory.

Log Product Consumption (Android and iOS)

You can let users who are associated with a mobile inventory location create product consumed records from the field service app.

1. Add the Products Consumed related list to the work order page layout to make it visible in the Products and Related tabs of the work order carousel.
2. Assign the user the object permissions listed in Track Inventory Consumption.

Let Users Add Required Products (iOS Only)

If a particular product is required to complete a work order or work order line item, add it as a required product. You can let your team create product required records.

1. Add the Products Required related list to work order and work order line item page layouts.
2. Assign the user the object permissions listed in Track Required Inventory.

Customize the Field Service Mobile App

Learn how to customize the Field Service mobile app’s screens, actions, and branding settings, and create unique mobile experiences for different user profiles.

**Important:**
- Users must re-log in to the app to receive metadata updates like page layout changes.
- Salesforce doesn’t recommend manually deleting metadata. If the mobile device goes offline immediately after metadata is deleted, data may not be available until the device is back online. After metadata is deleted, refresh all application tabs—Schedule, Inventory, and Profile—by pulling down on each screen.

**IN THIS SECTION:**

- **Customize the Field Service Mobile App by User Profile**
  Assign unique configurations of mobile app settings to different user profiles to accommodate the needs of contractors, supervisors, and other app users.

- **Customize Screens in the Field Service Mobile App**
  Control which fields users see in the Field Service mobile app by updating page and search layouts.

- **Brand the Field Service Mobile App**
  Give the Field Service mobile app your company’s look and feel by customizing the colors used in the user interface. Apply your company colors or optimize the color scheme to compensate for the relative brightness of your mobile workforce’s work environments.

- **Add a Profile Tab Background Image in the Field Service Mobile App**
  Add a Profile Tab Background Image in the Field Service Mobile App.

- **Track Service Resource Geolocation with the Field Service Mobile App**
  Use geolocation to manage your mobile workforce. You can exclude certain users from geolocation tracking.

- **Set Up Custom Actions in the Field Service Mobile App**
  Configure quick actions, global actions, flows, and app extensions to help your team work more efficiently from the field. Actions are displayed in a predefined order in the action launcher on record pages in the app.
Customize the Field Service Mobile App by User Profile

Assign unique configurations of mobile app settings to different user profiles to accommodate the needs of contractors, supervisors, and other app users.

For example, you can create a different branding experience for contractors, or assign particular geolocation settings or app extensions to mobile workers versus supervisors. Alternatively, you can use the same settings configuration for all users.

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

2. Your org comes with one settings configuration named Field Service Mobile Settings, which is assigned to all user profiles by default.
   - To edit that configuration, click Edit.
   - To create a new configuration of mobile settings that can be assigned to different user profiles, click New.

3. Update the label if desired.
   For example, you might want two settings configurations named Supervisor Settings and Technician Settings, respectively.

4. Update the settings as needed.
   Tip: To give app users edit access to their field service records, select Enable Full Edit on Records. If you want to restrict editing from the mobile app, don’t select this option.

5. Click Save.

6. Click Mobile Settings Assignment, then click Edit Assignment to assign your settings configurations to user profiles.
Customize Screens in the Field Service Mobile App

Control which fields users see in the Field Service mobile app by updating page and search layouts. Records in the Field Service mobile app display the first three fields in the corresponding page layout. Some fields are hard-coded, meaning they are shown in the app regardless of their place in the page layout.

**Important:**
- When you update metadata like a page layout, users must log out and log into the Field Service mobile app to see the changes.
- Not all field types are supported in the Field Service app. Review Supported Data Types in the Field Service Mobile App before you configure your layouts.

<table>
<thead>
<tr>
<th>Screen in the mobile app</th>
<th>Page Layout</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absences</td>
<td>Absences related list on the Service Resource page layout</td>
<td>You can reach the Absences screen from the Profile screen. Resource absences are displayed differently in the app based on whether the start time and end time fields are included in the related list layout.</td>
</tr>
<tr>
<td>Inventory</td>
<td>Search results layout on the product item object.</td>
<td>The Inventory tab represents the items in the user’s inventory. It shows product items associated with the user’s service resource record. Service resources only see the Inventory tab if they’re associated with a mobile inventory location (which represents their service vehicle). See Let Users Manage Inventory from the Field Service Mobile App.</td>
</tr>
<tr>
<td>Products</td>
<td>Product search layout</td>
<td>Users must be able to find products to create product requests and product items. Users viewing products in the app see the Product Name field and the top 3 fields in the search layout.</td>
</tr>
</tbody>
</table>

**Editions**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

Field Service mobile users need the **Field Service Mobile** user license to access the app.

**User Permissions**

To modify page layouts:
- Customize Application

To create custom list views:
- Read on the type of record included in the list AND
- Create and Customize List Views

To create, edit, or delete public list views:
- Manage Public List Views
<table>
<thead>
<tr>
<th>Screen in the mobile app</th>
<th>Page Layout</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Products Consumed</td>
<td>Product consumed related list on the work order. Product consumed number must be the first field.</td>
<td>You can reach the Products Consumed screen from the Related tab or the Products tab in the work order carousel.</td>
</tr>
<tr>
<td>Record Highlight for any record</td>
<td>Compact Layout of the record (for example, Service Appointment Compact Layout)</td>
<td>A record highlight is a preview of a record. The top-most field in a record’s compact layout is displayed prominently.</td>
</tr>
<tr>
<td>Record Lookup</td>
<td>Search Layout of the record (for example, Contact Search Layout)</td>
<td>A record lookup is a search for a record. To change the search results, update the search layout in your org.</td>
</tr>
<tr>
<td>Related Lists</td>
<td>Related list layout</td>
<td>Related list sorting uses the default page layout sorting. If the user overrides the sort setting, the app uses this setting for related list sorting. Related list sorting only sorts on one column.</td>
</tr>
</tbody>
</table>
| Schedule                      | • The layout selected in the Default List View Developer Name field on the Field Service Mobile Settings assigned to the user's profile.  
• (If no list view is specified) Service Appointment search layout | The Schedule tab lists service appointments assigned to the user. For details, see Customize the Schedule Tab.                                                                                         |
| Service Appointment           | List view layout.                                                           | The service appointment screen includes the following fields in the following order:                                                                                                                   |
|                               |                                                                             | • First field in the service appointment list view (displayed as a title)  
Note: To search Products, a pricebook must be set on the parent object. Only string fields are searchable. Numbers, Dates and other fields can't be searched. |
<table>
<thead>
<tr>
<th>Screen in the mobile app</th>
<th>Page Layout</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>• Scheduled Start (only visible if the field has a value)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• First three fields in the service appointment search layout</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Address (only visible if the field has a value)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Scheduled End (only visible if the field has a value)</td>
</tr>
</tbody>
</table>

**Work Order Overview**

List view layout
- First field in Work Order compact layout is in bold in the app.
- Description field can’t be changed and shows a max of 3 lines.
- Has up to 5 fields (including the title) displayed in this layout

You can reach the Work Order Overview screen by tapping a service appointment from the Schedule tab.

**IN THIS SECTION:**

**Customize the Schedule Tab**

The Schedule tab in the Field Service mobile app shows service appointments that are assigned to the user. The Schedule tab layout is based on a list view specified in Setup. If no list view is specified, it uses the service appointment search layout.

**Customize the Layout of the Work Order Overview Screen**

When a user taps a service appointment on the Schedule tab, an overview of the work order is shown. You can customize the highlights and cards shown on the work order overview screen.
Customize the Schedule Tab

The Schedule tab in the Field Service mobile app shows service appointments that are assigned to the user. The Schedule tab layout is based on a list view specified in Setup. If no list view is specified, it uses the service appointment search layout.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

Field Service mobile users need the Field Service Mobile user license to access the app.

USER PERMISSIONS

To modify search layouts:
- Customize Application

To create custom list views:
- Read on the type of record included in the list
  AND
- Create and Customize List Views

To create, edit, or delete public list views:
- Manage Public List Views
You can base the Schedule tab on a list view. Using a list view allows you to set criteria to filter the records that appear to app users.

1. Create a service appointment list view with up to four fields. Set filter criteria to filter the records according to your use case. Note the API name of the list view.

2. From Setup, enter Field Service Mobile Settings in the Quick Find box, then select Field Service Mobile Settings.

3. Click Edit next to the mobile settings configuration you want to define the list view for.

4. In the Default List View Developer Name field, enter the API name of the list view you want to use.

   **Tip:** The Default List View Developer Name is the name of the list view that shows when the mobile Service Appointment page is first opened. If the Default List View Developer Name isn’t defined, mobile users see their service appointments within the date picker range. This list and the list defined are available offline. However, there isn’t an option to change to another list view on the mobile device unless the Default List View Developer Name is defined.

5. Click Save.

If no list view is specified in Setup, users viewing service appointments from the Schedule tab see the following fields:

- Scheduled Start
- Scheduled End
- Address
- Top field in the Service Appointment search layout (excluding the previous three).

**Considerations for Customizing the Schedule Tab**

- The service appointment calendar view appears differently on Android and iOS devices. On Android, the calendar uses a month view. On iOS, the calendar uses a week view.

- If the Schedule tab is based on a list view, including the Scheduled Start field in your list view filter lets app users see a date picker with a range of 45 days before and after the current date. If the list view doesn’t include this field, users just see a single Schedule tab of the user’s appointments based on your filter criteria, as it would appear on the full Salesforce site.

- Service appointments in the schedule list are shown in chronological order. This order cannot be changed.

- Lookup fields, like Account, aren’t supported on the Schedule tab and won’t show up.

- Formulas aren’t supported on the Schedule tab.

- The app prominently displays the top two fields of the service appointment search layout, so consider which fields your mobile workforce needs to see on the Schedule tab. Many users, for example, may prefer to see Subject instead of the service appointment ID. Scheduled Start and Address are displayed in the same location regardless of the list view or search layout settings.

- Multi-day appointments appear on the Schedule tab in the following way:
  - If a multi-day appointment includes both a Scheduled Start and Scheduled End, the appointment appears on the schedule for every day between those two dates and includes a visual progress bar representing the job’s scheduled completion.
  - If a multi-day appointment includes a Scheduled End but not a Scheduled Start, the appointment appears on the schedule every day until the Scheduled End date.
  - If a multi-day appointment includes a Scheduled Start but not a Scheduled End, the appointment appears on the schedule every day after the Scheduled Start date until the appointment is complete.
Customize the Layout of the Work Order Overview Screen

When a user taps a service appointment on the Schedule tab, an overview of the work order is shown. You can customize the highlights and cards shown on the work order overview screen.

**Important:**
- When you modify a page layout, users must log out and log in to the Field Service mobile app to see the changes.
- Not all field types are supported in the Field Service app. Before you configure your layouts, review Supported Data Types in the Field Service Mobile App.

**Change the Screen Layout**

A preview of the work order is anchored to the top of the screen. This preview shows the first five fields in the work order compact layout, with the Description field counted as one of the five. The first field in the compact layout appears in bold and is used as the title of the work order overview. The Description field appears below the title and is followed by the next three fields in the compact layout.

1. From the Object Manager in Setup, select **Work Order**.
2. Click **Compact Layouts**.
3. Click the name of the compact layout and edit the layout as desired.
4. Save your changes.

Navigate the Work Order Carousel

The horizontal work order carousel lets users switch between the following views:

- **Overview**: Shows work order cards
- **Products**: Where users manage required and consumed products
- **Details**: Shows all supported fields on the work order page layout
- **Related**: Shows all related lists on the work order page layout
- **Feed**: Shows the Chatter feed if feed tracking is enabled
- **Location**: Shows work in the same location as the current appointment. To see the Location view users need access to the Location field, which must be populated, on the Work Orders object.

Add Cards

On the Overview tab in the work order carousel, users see information about the work order and its child records. The information appears in cards, which are discrete spaces for different kinds of information. The following cards can be added to the work order overview screen.

<table>
<thead>
<tr>
<th>Card</th>
<th>Description</th>
<th>How to Display and Customize</th>
<th>Available In</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset Service History</td>
<td>Provides context about the maintenance history of an asset. It shows the asset associated with the current work order. It also lists the asset’s three most recent work orders and provides a link to view all associated work orders. It does not show work order line items that are associated with the asset.</td>
<td>In Android, the Asset Service History card displays the first four fields in the work orders related list from the asset page layout. The first field is displayed prominently. In iOS, this card displays the work order number and the first field from the asset detail page layout. Normally, the first field is the asset name.</td>
<td>Android and iOS</td>
</tr>
<tr>
<td>Event Insights</td>
<td>Shows diagnostic IoT data for customers’ connected devices that helps mobile workers more quickly analyze and solve customer issues while on site. For details, see Salesforce IoT.</td>
<td>In Setup, under Manage Connected Apps, enable Event Insights. Salesforce IoT is included with Service Cloud in Unlimited Edition.</td>
<td>Android only</td>
</tr>
<tr>
<td>Knowledge</td>
<td>Shows knowledge articles that are attached to the work order, with a snippet of each article included.</td>
<td>In iOS, the Knowledge card is only visible if an article is attached to the work order.</td>
<td>iOS only</td>
</tr>
<tr>
<td>Service Appointment</td>
<td>Shows a map and the option to navigate to the address of the appointment. If the address is</td>
<td>If the work order has one or more service appointments, the</td>
<td>Android only</td>
</tr>
<tr>
<td>Card</td>
<td>Description</td>
<td>How to Display and Customize</td>
<td>Available In</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Service Report</td>
<td>Displays service reports associated with the work order’s service appointments.</td>
<td>If a service report has been previously generated, the Service Report card appears at the top of the Overview tab. There is no option to create a service report. Otherwise, the card appears at the bottom of the Overview tab and includes an option to create a service report. The Service Report card is visible by default in iOS. To make the card visible in Android, manually add it to layout.</td>
<td>Android and iOS</td>
</tr>
<tr>
<td>Work Order Line Item</td>
<td>Shows a visual progress indicator for the work order and lists its work order line items. iOS users with the proper permissions can tap the + icon to create line items. For details, see Let Users Create Work Order Line Items from the Field Service Mobile App.</td>
<td>If the work order has work order line items, the Work Order Line Item card is visible. In Android, this card displays four fields for each line item. The Work Order Line Item Number field is always visible. It’s followed by the first three fields from the Work Order Line Items related list. The card for child Work Order Line Items is not available in Android. In iOS, this card displays the first two fields from the Work Order Line Items related list.</td>
<td>Android and iOS</td>
</tr>
</tbody>
</table>
Brand the Field Service Mobile App

Give the Field Service mobile app your company’s look and feel by customizing the colors used in the user interface. Apply your company colors or optimize the color scheme to compensate for the relative brightness of your mobile workforce’s work environments.

1. From Setup, enter Field Service Mobile Settings in the Quick Find box, and select Field Service Mobile Settings.

2. Click Edit next to the mobile settings configuration you want to modify, or New to set up a new settings configuration.

   Each configuration can be assigned to one or more user profiles.

3. Under Branding Colors, update the hex color code of each setting as needed.

   **Important:** Each value must consist of the # symbol followed by six letters or numbers.

4. When you have entered values for every token you wish to modify, click Save.

   Users must log out and log in to the app to see changes to branding.

**Note:** iOS 13 and later app users can enable Dark Mode from their OS settings. However, this overrides the custom branding colors for some UI elements.
<table>
<thead>
<tr>
<th>Token Name</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navbar Background Color</td>
<td>The color of the top bar in the app.</td>
<td>#803ABE</td>
</tr>
<tr>
<td>Navbar Inverted Color</td>
<td>The secondary color of the top bar in the app.</td>
<td>#FFFFFF</td>
</tr>
<tr>
<td>Brand Inverted Color</td>
<td>The color of toasts and the contrast color for the floating action button.</td>
<td>#FFFFFF</td>
</tr>
<tr>
<td>Feedback Primary Color</td>
<td>The color of error messages.</td>
<td>#C23934</td>
</tr>
<tr>
<td>Feedback Secondary Color</td>
<td>The color of success messages or progress icons.</td>
<td>#13C4A3</td>
</tr>
<tr>
<td>Feedback Selected Color</td>
<td>The color indicating the user’s current selection.</td>
<td>#FFFFFF</td>
</tr>
<tr>
<td>Primary Brand Color</td>
<td>The color of non-interactive areas in the app.</td>
<td>#803ABE</td>
</tr>
<tr>
<td>Secondary Brand Color</td>
<td>The color of interactive areas in the app.</td>
<td>#2A7AB0</td>
</tr>
<tr>
<td>Contrast Primary Color</td>
<td>The color of primary text.</td>
<td>#000000</td>
</tr>
<tr>
<td>Contrast Secondary Color</td>
<td>The color of secondary text.</td>
<td>#444444</td>
</tr>
<tr>
<td>Contrast Tertiary Color</td>
<td>The color of the icons on the settings screen and of primary lines that delineate different areas of the UI.</td>
<td>#9FAAB5</td>
</tr>
</tbody>
</table>
## Add a Profile Tab Background Image in the Field Service Mobile App

Add a Profile Tab Background Image in the Field Service Mobile App.

1. Upload your image as a static resource.
   a. From Setup, enter *Static Resources* into the Quick Find box and click *Static Resources*.
   b. Click *New*.
   c. Give the static resource a name, like `background_banner`. Remember the name, since you need to use it in a later step.
   d. Select an image file for upload. An image sized at 3072 x 819 pixels leads to the best results on large displays such as iPads in landscape mode. However, if your users often encounter slow mobile networks, consider using a smaller image.
   e. Click *Save*.

2. Create a custom attribute to use the static resource on every user’s Profile tab.
   a. From Setup, enter *Connected Apps* into the Quick Find box, then select *Connected Apps*.
   b. Select *Salesforce Field Service for iOS* or *Salesforce Field Service for Android*.
   c. Scroll down to the list Custom Attributes and click *New*.
   d. For the attribute key, enter `COMPANY_PROFILE_IMAGE_RESOURCE_NAME`.
   e. For the attribute value, enter the name of the static resource you created surrounded by quotation marks.
      
      Tip: If you named your static resource `background_banner`, your attribute value is “*background_banner*”.
   f. Click *Save*.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

Field Service mobile users need the Field Service Mobile user license to access the app.

### USER PERMISSIONS

To set the company profile image:
- Customize Application
Customize the Field Service Mobile App
Track Service Resource Geolocation with the Field Service Mobile App

Use geolocation to manage your mobile workforce. You can exclude certain users from geolocation tracking.

When service resource tracking is enabled, the Field Service mobile app uploads the geolocation of app users to Salesforce at regular intervals. Enable service resource tracking in Setup.

1. From Setup, in the Quick Find box, enter Field Service Settings, and then select Field Service Mobile Settings.

2. Click Edit next to the settings configuration that you want to update.

3. Under Additional Settings, select Collect Service Resource Geolocation History. This option is mandatory for data collection.

4. Enter values for the following geolocation-related fields.
   
   Tip: Higher-precision or higher-frequency settings increase battery consumption on mobile devices. To conserve battery power with Android O and later, your position is updated less frequently when the app is in the background. To get an accurate position update, open the Field Service mobile app on your phone.

   Important: Because of an iOS device limitation in background mode, the location updates only about every five minutes when the device moves 500 meters or more from its previous location. When the app is in the foreground, it updates as specified in the Geolocation Update Frequency in Minutes and Geolocation Accuracy fields.

   - Geolocation Update Frequency in Minutes: Controls how often geolocation is polled when the app is running in the foreground. For iOS devices, this value also controls update frequency when the app is in the background.

   - Geolocation Update Frequency in Minutes (Background Mode): For Android devices, this value controls how often geolocation is polled when the app is running in the background. See the important note about iOS devices when in background mode.

   - Geolocation Accuracy: This value controls the accuracy of the geolocation data collected when the app is running in the foreground. Choose from the following values:
     - Fine: 10 meters
     - Medium: 100 meters
     - Coarse: 1 kilometer

   - Geolocation Accuracy (Background Mode): For Android devices, this value controls the accuracy of the geolocation data collected when the app is running in the background. See the important note about iOS devices when in background mode. Choose from the following values:
     - Medium: 100 meters
     - Coarse: 1 kilometer
     - Very Coarse: The app doesn’t poll for geolocation data, and geolocation coordinates update only when another app polls for geolocation. The accuracy of the geolocation data depends on the accuracy setting of the application that triggers the geolocation poll.

5. Save your changes.

   Note: Admins must grant mobile workers Read/Write access on their Service Resource (SR) record in order for geolocation tracking to work. The steps to grant this access are provided next.
6. From the Service Resources tab, select **Sharing (SU Only)** on the Service Resource record.

7. Search for the mobile worker whose location you want to track and grant Read/Write access.

   Geolocation tracking is now enabled and the app will automatically update the mobile worker’s location.

What if you want to exclude specific mobile workers from tracking? For example, not all members of your workforce are legally protected against geolocation tracking.

Individual mobile users can turn off location tracking for the Field Service mobile app from their phone’s operating system settings. To exclude them from tracking at the admin level:

1. From Setup, in the Quick Find box, enter **Permission Sets**, and then select **Permission Sets**.
2. Create a new permission set for users that you want to exclude from geolocation tracking.
3. Give the permission set a label and under License, select **Field Service Mobile**.
4. Save the permission set.
5. From the settings of your new permission set, click **System Permissions**.
6. Click **Edit** and select **Exclude Technician from Geolocation Tracking**.
7. Save your changes.
8. Click **Manage Assignments**, and then click **Add Assignment**.
9. Select the users that you want to exclude from geolocation tracking, and then click **Assign**.

### Set Up Custom Actions in the Field Service Mobile App

Configure quick actions, global actions, flows, and app extensions to help your team work more efficiently from the field. Actions are displayed in a predefined order in the action launcher on record pages in the app.

**IN THIS SECTION:**

- **Which Actions Appear in the Field Service Mobile App**
  
  Learn which actions are visible in the Android and iOS app action launcher.

- **Create Quick Actions for the Field Service Mobile App**
  
  Add quick actions to object page layouts so your mobile workforce can quickly create and edit records, send messages to contacts, and more.

- **Let Users Create Work Order Line Items from the Field Service Mobile App**
  
  Help your team stay organized in the field by letting them create work order line items to split work orders or work order line items into sub-tasks. This feature is available in the Field Service mobile app for iOS, but not for Android.

- **Create App Extensions for the Field Service Mobile App**
  
  Create app extensions to let users pass data from the Field Service app to another app.

- **Add Flows to the Field Service Mobile App**
  
  Guide your team through mobile flows in which they can view information, create and update records, and trigger input-based actions.

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**EDITIONS**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

Field Service mobile users need the **Field Service Mobile** user license to access the app.

**USER PERMISSIONS**

To create quick actions and add them to page layouts:
- **Customize Application**
Which Actions Appear in the Field Service Mobile App

Learn which actions are visible in the Android and iOS app action launcher.

Actions Available in the App

When a user clicks the Actions button from the Work Order Overview screen, they see a list of actions found on the page layouts for the Service Appointment and Work Order objects. The Actions launcher displays actions in the following order:

1. Create Service Report: Only visible on the Work Order screen if an alternate service closure flow isn’t configured and the service appointment page layout includes the Service Reports related list.
2. Actions are then separated by Object - Work Order and Service Appointment. App extensions and flows scoped to work orders or service appointments are at the top of the section (sorted alphanumerically).
3. After app extensions and flows, Salesforce Classic Publisher Quick Actions display in the order of the page’s layout. (Android only): View Detail is displayed under Quick Actions.
4. After Quick Actions, Edit Work Order, Edit Work Order Line Item, or Edit Service Appointment are displayed.
5. App extensions and flows not scoped to an object are shown at the bottom of the page layout.

Note: To see Actions order changes in the mobile app that were made on the desktop, log out and back in to the mobile app.

Considerations for Android Devices

- In Android, actions are categorized as Work Order Actions or Service Appointment Actions. In iOS, these actions are consolidated into one list.
- The Create Service Report action isn’t visible in Android. To create a service report in Android, navigate to the Work Order Overview screen.
- The Knowledge Article action isn’t visible on the Work Order Overview screen in Android. View knowledge articles using the related list.
Create Quick Actions for the Field Service Mobile App

Add quick actions to object page layouts so your mobile workforce can quickly create and edit records, send messages to contacts, and more.

Users viewing records can call a quick action by tapping the action from the action launcher. Quick actions are assigned to record page layouts. For example, you can add a Create Opportunity action to the contact page layout to let users create an opportunity from any contact record in the app.

Create a work order quick action and add it to the work order overview screen.

1. From the Object Manager in Setup, click Work Orders, then click Buttons, Links, and Actions.
2. Click New Action.
3. Configure an action to either create or edit a record, and save your changes.
4. From the Object Manager, click Page Layouts under Work Orders.
5. Click the work order page layout.
6. From the layout editor, select Quick Actions.
7. Drag your newly created action into the Quick Actions in the Salesforce Classic Publisher section.
8. Save your changes.
   The action will be visible in the app and on the full Salesforce site.

Tip: You can follow these steps for any field service object available in the app.

Note: The app supports quick actions of the types Create a Record and Update a Record. Lightning Component, Visualforce, and custom override actions aren’t supported.
Let Users Create Work Order Line Items from the Field Service Mobile App

Help your team stay organized in the field by letting them create work order line items to split work orders or work order line items into sub-tasks. This feature is available in the Field Service mobile app for iOS, but not for Android.

1. Create a quick action to create a work order line item.
   a. From the Object Manager in Setup, select Work Order, and then click Buttons, Links, and Actions.
   b. Click New Action.
   c. Select the action type Create a Record.
   d. Select the target object Work Order Line Item.
   e. Select the standard label type New Child [Record].
   f. Enter a label, such as New Line Item.
      This automatically generates the API name.
   g. Add a description, such as Create a work order line item.
   h. Select whether or not to create a Chatter feed post when the action is used.
   i. Optionally, enter a success message that will show when the user creates a line item.
   j. Save your changes.

2. Add your quick action to the work order page layout.
   a. From the Object Manager in Setup, select Work Order, then click Page Layouts.
   b. Click Work Order Page Layout.
   c. In the layout editor, select Quick Actions.
   d. Drag your newly created action into Quick Actions in the Salesforce Classic Publisher.
   e. Save your changes.

When this action is added to the layout, iOS users see a + icon in the Work Order Line Item card on work orders and work order line items. Users can tap the icon to create a new work order line item.

When this action is added to the layout, iOS users see a + icon in the Work Order Line Item card on work orders and work order line items. Users can tap the icon to create a new work order line item.

Note: When a record type other than Master is set to the default, you must use that same record type when creating a quick action for the page layout.
Create App Extensions for the Field Service Mobile App

Create app extensions to let users pass data from the Field Service app to another app.

<table>
<thead>
<tr>
<th>App Extension Type</th>
<th>Supported in Android</th>
<th>Supported in iOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Android</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>iOS</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Lightning Apps</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Web apps</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Flow</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

To set up an app extension, follow the steps below.

1. From Setup, enter Field Service Mobile Settings in the Quick Find box, then select Field Service Mobile Settings.
2. Click Edit next to the mobile settings configuration that you want to create an app extension for.
4. Fill out the fields.
   - **Field Service Mobile Settings**: Automatically populated. Represents the current Mobile Field Service Settings configuration.
   - **Type**: A picklist of app extension types. The iOS and Android types will only show on their respective devices. Flow refers to a Flow (Setup > Process Automation > Flows) of the type Field Service Mobile Flow. Lightning App refers to an app that is exposed in Salesforce for Android or Salesforce for iOS (Setup > Mobile Apps > Salesforce > Salesforce Navigation).
   - **Label**: The label as it appears to users in the app. The label isn’t localized automatically.
   - **Name**: The extension’s name.
   - **Scoped To Object Types**: The records from which a user can activate an app extension. Scoping an app extension to an object lets users activate that app extension from records of the specified type. The object names are entered as comma separated values and cannot include spaces. For example, to scope an extension to the Work Order object and the Service Appointment object, enter WorkOrder,ServiceAppointment. To create a global app extension so users can activate it from any record, leave this field blank.
   - **Launch Value**: A launch value of "https://google.com" will launch a web browser on both iOS and Android. The value to use to launch the app or Flow. If type is Flow, then the launch value is the API name of the flow you want to use. If type is Lightning App, the launch value is the name of the tab in Salesforce for iOS and Salesforce for Android. The tab name represents a Lightning Component Tab and you can find the tab name in Setup > Salesforce Navigation. The launch values for types iOS, Android, and Lightning App support passing parameters.

   **Note**: Using a nickname in an app extension launch URL results in an error.

   **Important**: For Lightning App types: Salesforce for Android version 17.0 supports passing Lightning App parameters. Salesforce for iOS version 18.0 does not currently support passing parameters. To bypass this issue, use a type of iOS with a URL format of https://{orgURL}/lightning/n/{tab name}?params=...
**Warning:** the Salesforce mobile app can launch and accept parameters for Visualforce pages exposed as a Lightning Page Tab. However, the Lightning Page Tab name can’t have any spaces in it.

**Note:** Open in Salesforce1 is available in iOS, but in Android, you need to create an Android app extension with the launch value of `salesforce1://sObject/{!Id}/view`

### Passing Tokens Into the Launch Value

**[other]:** Flow app extensions do not accept tokens. They receive the Flow input parameters described in Considerations for Using Flows in the Field Service Mobile App on page 334.

The launch value supports static URLs for web addresses, as well as dynamic values that can be used to pass contextual information to the other app in the form of tokens. These tokens can pass field information from any record that is visible on the Field Service app. For example, if the user is viewing a service appointment, the tokens can be used to pass the data from any field on that service appointment to the app extension. The basic format for these tokens is based on the names of the field, like so: `{!Name}`.

**Note:** Any content in the query parameters for the launch value should be url-encoded, not including the parameters that are substituted by Salesforce Field Service.

**Tip:** The following example uses a token to dynamically pass a custom text field that is on a work order into a Google search. The token is written in bold for clarity: https://www.google.com/#q={!WO_Custom_Text_Field__c}

The field name is case sensitive and must match the field name exactly as it is defined on the object.

Values that aren’t related to a record are called *global variables*. When you use a global variable in a token, use the format `{!$User.email}`.

### Supported Global Variables

<table>
<thead>
<tr>
<th>Organization.id</th>
<th>User.displayName</th>
<th>User.email</th>
</tr>
</thead>
<tbody>
<tr>
<td>User.firstName</td>
<td>User.id</td>
<td>User.language*</td>
</tr>
<tr>
<td>User.lastName</td>
<td>User.locale*</td>
<td>User.nickName</td>
</tr>
<tr>
<td>User.orgId</td>
<td>User.userName</td>
<td></td>
</tr>
<tr>
<td>User.username</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** *Android uses the device's language and locale settings.*
Add Flows to the Field Service Mobile App

Guide your team through mobile flows in which they can view information, create and update records, and trigger input-based actions.

IN THIS SECTION:

- **Connect a Flow to the Field Service Mobile App**
  You can set up an app extension that connects a flow to the Field Service Mobile App.

- **Create a Flow to Capture Images in the Field Service Mobile App**
  Create a flow that lets your team capture images from the Field Service mobile app. For example, make it easy for mobile workers to save photos of a customer’s asset before and after service.

- **Capture Customer Signatures on Service Reports with a Flow**
  Using an app extension, you can add a final step to capture a customer’s signature at the end of a flow.

- **Considerations for Using Flows in the Field Service Mobile App**
  Review flow considerations before using flows in the Field Service mobile app.

**EDITIONS**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

Field Service mobile users need the Field Service Mobile user license to access the app.

**USER PERMISSIONS**

To open, edit, or create a flow in Flow Builder:
- Manage Flow

To run flows from the app:
- Run Flows
Connect a Flow to the Field Service Mobile App

You can set up an app extension that connects a flow to the Field Service Mobile App.

Before you create an app extension, make sure that you have already created a flow.

1. From Setup, enter Field Service Mobile Settings in the Quick Find box, and select Field Service Mobile Settings.
   
   **Important:** Only the user profiles assigned to the mobile settings configuration you select have access to the flow. To manage user profile assignments, click Manage Assignments on the Field Service Mobile Settings page.

2. Click Edit next to the mobile settings configuration that you want to add the flow to.


4. Enter a label for your app extension. This label is what your users see in the user interface.

5. For Type, select Flow.

6. Enter a name that expresses the purpose of the flow.

7. For Scoped to Object Types, which controls where users can find and activate the flow, enter the API name of the object.
   
   If you want to scope the flow to multiple objects, separate the object names with a comma and no space. For example, if you enter WorkOrder,Contact, users can activate the flow from the detail page of a work order or contact.
   
   To create an unscoped flow action so that users can activate the flow from multiple screens, leave this field blank.

8. **Important:** Flows must be of the type Field Service Mobile.
   
   For Launch Value, enter the unique name of your flow.

9. Click Save.

Add a Flow from a Quick Action

1. Create a Flow with type Field Service Mobile Flow. Remember the Flow Label name, you will need it later.

2. Mark the new flow as Active.

3. In Object Manager select Work Order or Work Order Line Item, depending on which layout you want to use.

4. Click Buttons, Links, and Actions.

5. Click New Action and set the Action Type to Flow.

6. Set the Flow dropdown to the Flow Label name.

7. Enter the text you want to appear in the app for the name field. Remember this name, you will need it later.

8. Save your work.


10. Click on the page layout you want to modify, then select Mobile and Lightning Actions.

11. Find the action you created by searching for the name you entered in the name field.

12. Drag your action to the Salesforce Mobile and Lightning Experience section of your layout.

13. Save your layout.
Create a Flow to Capture Images in the Field Service Mobile App

Create a flow that lets your team capture images from the Field Service mobile app. For example, make it easy for mobile workers to save photos of a customer’s asset before and after service.

1. Build a flow with a Screen element that contains a File Upload component.
   An API name is generated when you label your flow. You need the API name to connect the flow to the Field Service mobile app.

2. Save your flow as the Field Service Mobile Flow type.
   You can now connect the flow to the Field Service app with an app extension or Quick Action, just like any other flow.

Capture Customer Signatures on Service Reports with a Flow

Using an app extension, you can add a final step to capture a customer’s signature at the end of a flow.

**User Permissions Needed**

To view, edit, or create a flow in Flow Builder: Manage Flows

After you build a flow, create an app extension with the following settings. These settings don’t change the rest of your flow, but when the mobile app detects the Service_Report_Flow name, it launches the Service Report preview interface when your flow completes.

- **Label**—Enter the text that you want to appear in the Actions tab. For example, My Service Report Flow.
- **Type**—Select Flow.
- **Name**—Enter Service_Report_Flow.
- **Scoped to Object Types**—Enter ServiceAppointment.
- **Launch Value**—Enter the API name of the flow that you want to conclude with signature capture.

Because the API name of the service report flow is unique, you can have only one Service_Report_Flow at a time.
Considerations for Using Flows in the Field Service Mobile App

Review flow considerations before using flows in the Field Service mobile app.

**Downloading Flow Data**

When the app loads a user’s schedule data, it also downloads global flows and any flows scoped to records in their schedule data. Pulling down on the screen to sync with Salesforce causes the app to reload flow metadata.

**Flow Input Parameters**

When an iOS or Android app launches a flow, it passes the following input parameters:

- Id—The ID of the record that the flow is launched from.
- UserId—The ID of the current user.
- ParentId—The record ID of the parent record that the flow is launched from. For example, if a flow is launched from a service appointment, the ParentId is the ID of the parent work order or work order line item.

**Creating a Choice Option**

If the user selects the choice value to use in a screen component, such as a radio button or multi-select picklist, the screen component is set to this value. If no choice value is configured, the screen component is set to the choice label.

**Flow Limitations in the Field Service Mobile App**

- Select formula functions and operators are available offline. See Available Formula Functions and Operators on page 336.
- Backslash \ characters and single quotes (’’) aren’t supported in flow formula fields.
- Screen flows launched using quick actions or app extensions aren’t supported.
- Email alert actions aren’t supported in flows.
- Paused flows aren’t supported. If you leave a flow in progress and exit the Field Service mobile app, you can’t resume the flow where you left off.
- The wasSelected operator can’t be used in decisions.
- For eval() functions, the boolean values true and false are case-sensitive.
- Hardcoded ID values must be 18 digits long. 15-digit values aren’t supported.
- Apex classes aren’t supported in flows.
- Fault connectors aren’t supported in flows.
- When uploading images in flows, the content document IDs parameter isn’t supported. Admins must create a flow confirmation screen to show which images were uploaded. Videos and other file types aren’t supported.
- Flows don’t support the following elements. Adding these elements to a flow causes it to display an error.
  - Lightning components (except for file upload)
  - Output parameters on file upload except for “Uploaded File Names”
  - Choice resources with Display Text Input enabled
  - Actions with output parameters

**Note:** Some flows that have actions with output parameters don’t cause an error immediately, but they’re still not supported.
• Flows don’t support the Section screen component.
• Flow picklists that include a default value aren’t supported. If you choose a default value, it isn’t shown as the default value in the picklist and isn’t used in the mobile flow. To work around this issue, add a separate choice that is a constant equal to the value of the default value in the object’s screen picklist value.
• In flows, radio button fields that aren’t required allow the user to select from a list of values, including a --None-- option. --None-- is a null value that allows the field to be optional.
• Flow picklists use the values of the choice set from which the default value is assigned.
• Flow record variables require record fields to be accessed through their field API names. Use of field relationship names isn’t supported.
• Record field lookups are limited to one level of indentation. If more levels are required, use assignment elements.
• Flow text areas have a 2,000-character limit.
• Using semicolons when defining user choices in flow checkbox groups and multi-select picklists isn’t supported. If you use semicolons for user choices, the data doesn’t render accurately.
• Record choice sets don’t retain the value that is selected. A record choice set variable can’t be used to determine what selection was made. However, the component used to make the selection, such as a picklist, saves that value for later use.
• Custom Logic and the `or` operator within `Get` elements and the record choice set variable aren’t supported in the Field Service mobile app.
• When using a flow that has a subflow, returning to the main flow from the subflow using the Previous button discards entered data.
• Recently added records from the Field Service org don’t show in mobile flows when using Flow Record Choice Set to query from these records. To resolve this issue, log out and then back into the mobile app.
• Flows installed on the Field Service mobile app using a managed package result in an error. We recommend using an unmanaged package instead. This error only occurs on the mobile app.
• HTML text isn’t supported in Flow builder.
• Mobile flows support only these global values:
  – `$Flow.CurrentDateTime`
  – `$Flow.CurrentDate`
  – `$GlobalConstant.EmptyString`
• Flows on desktop and mobile don’t support picklist default values that are derived from an object’s picklist values.
• If a default value is assigned in the picklist component of the flow, then the values are populated from the default picklist field value and not the picklist choice set assigned to it.
• Running a flow as another user isn’t supported.
• Only the following assignment operations for collections are supported:
  – Add
  – Equal
  – Equals Count
• Picklist values are expanded if there are five or fewer values or if the picklist is the only component on that particular flow screen. Otherwise, values are displayed as a dropdown list.
• When a Record/Dynamic Choice Set is used as a data list for a single item picklist in a flow, the screen doesn’t display correctly. To work around this behavior, add additional items to the picklist.
• Flows can have up to nine conditions in a decision element.
• Record Choice Sets created using the AttachedContentDocuments objects on a Work Order or any object that supports it don’t work in the mobile app. The mobile app doesn’t support showing a related list for files within a flow.
• When using the `NOW()` formula in fields, create a separate formula resource that resolves to `NOW()`, and use that resource in the validation field. This ensures the latest timestamp is used on the flow launch.

• Flows retain variable values after they're entered. Clicking the Back button in a flow doesn't clear the value.

• In field service mobile app flows that use the Create Record element, the ID populates with the app's cache ID. This cache ID isn't the newly created record's ID. To access the cache ID in a Flow on the app, you must turn on the option "Use separate resources, and literal values" in the Create Record element.

• Chaining of formulas in the same flow step isn't supported.

• Collection Choice Sets aren't supported in flows.

Available Formula Functions and Operators

⚠️ Important: Formula functions are case-sensitive. Make sure to use the formatting listed.

### Math Operators
- `+` (Add)
- `-` (Subtract)
- `*` (Multiply)
- `/` (Divide)
- `()` (Open and Close Parenthesis)

### Logical Operators
- `==` (Equal), only `==`, not `=`
- `!=` (Not Equal), only `!=`, not `<>
- `<` (Less Than)
- `>` (Greater Than)
- `<=` (Less or Equal)
- `>=` (Greater or Equal)
- `&&` (And), only `&&`, not AND
- `||` (Or), only `|| OR

### Date and Time Functions
- `DAY`
- `MONTH`
- `NOW`
- `WEEKDAY`
- `YEAR`

### Text Functions
- `BEGINS`
- `CONTAINS`
- `FIND`
- `LEFT`
- `LEN`
- `LOWER`
- `RIGHT`
- `SUBSTITUTE`
- `TRIM`
- `UPPER`
- `VALUE`

### Logical Functions
- `ISBLANK`
- `ISNUMBER`

### Math Functions
- `ABS`
- `CEILING`
- `FLOOR`
- `LN`
- `LOG`
- `SQRT`

### Advanced Functions
- `REGEX`
Using the Field Service Mobile App

Learn how to install and log into the app, adjust in-app settings, and complete common tasks from the app.

IN THIS SECTION:

Get the Field Service Mobile App
The Field Service mobile app is available to users with the Field Service Mobile license and a supported Android or iOS device. Learn how to install the app and log in.

Customize Push Notifications for the Field Service Mobile App
Push notifications alert your mobile workforce to approaching appointments and scheduling changes.

Offline Priming in the Field Service Mobile App
Learn what data the Field Service mobile app downloads for offline work and how the app syncs with Salesforce.

In-App Profile Settings in the Field Service Mobile App
Click the gear icon in the top right-hand corner of the Profile tab to view pending uploads, manage linked accounts, and provide feedback to Salesforce about the app.

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Collaborate on field service jobs using Chatter. Feed tracking must be enabled to display the Feed tab.

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Knowledge articles can be attached to work orders, work order line items, and work types to share product specs, instructions, and guidelines with your team.

Create Resource Absences in the Field Service Mobile App
Resource absences indicate when a service resource is unavailable to work. During schedule optimization, service resources aren’t assigned to appointments that conflict with their absences. View and manage absences from the Profile tab in the app.
Get the Field Service Mobile App

The Field Service mobile app is available to users with the Field Service Mobile license and a supported Android or iOS device. Learn how to install the app and log in.

To get the app, search for *Field Service* in the Google Play Store or the iOS App Store on your mobile device.

When the app is downloaded, tap it to launch it. Upon launching it for the first time, you’ll receive several device permission requests. Approve any requests to let the app:

- Send you notifications
- Access your basic information
- Access your location, which is used in the app’s mapping functionality and geolocation tracking for scheduling
- Access your camera

You can change the device permissions that your device gives the Field Service app at any time. To do so, navigate to your device’s settings, then tap the Field Service app.

**Tip:** When using the iOS app with iOS 13 or later, the location permission request allows the app to track the location only while the app is being used. To track the location while the app is in the background, set this value to “Always” from the device’s Settings app (Settings > Field Service > Location).

Logging In

When given the option, log in to Salesforce from the app. If prompted, create a passcode for an added level of security. If your Salesforce admin only allows logins through a company-specific login URL such as *mycompany.my.salesforce.com*, you must log in with a custom domain:

- Click the gear icon in the top right of the login screen to specify production or sandbox org, or press + to enter a custom domain.

If you’re an Experience Builder site user, the first login is slightly different. On the initial login screen, click the settings button in the top right, then add a connection with the URL of your site. The URL can be found in Setup under Digital Experiences. If you’re on iOS, omit `https://` when entering the site URL.

**Note:** If you see a prompt that says “FieldServiceApp Wants to Use salesforce.com to Sign In,” accept it to log in to the app. For custom logins, follow the steps in Customize the Default Login Process with Apex.
Customize Push Notifications for the Field Service Mobile App

Push notifications alert your mobile workforce to approaching appointments and scheduling changes.

You can extend or replace the default notifications using custom notifications.

1. Ensure that the connected app (different from the app itself) has been downloaded.
2. Enable notifications in Setup.
   a. From Setup, enter Field Service Settings in the Quick Find box, then select Field Service Settings.
   b. Under Notifications, select Enable notifications, and save your changes.
3. Choose when service appointment notifications are sent.
   a. From Setup, enter Field Service Mobile Settings in the Quick Find box, then select Field Service Mobile Settings.
   b. Next to your mobile settings configuration, click Edit.
   c. Under Customization, select how to send appointment notifications and then save your changes.
      • When you select Send appointment notifications on assignment, users are notified when they’re assigned to a service appointment and when their assignment is changed or removed. They’re not notified when they’re dispatched for the appointment. If a user changes or is removed from the service appointment after they were assigned, they still receive the notification, regardless of the status of the service appointment.
      • When you select Send appointment notifications on dispatch, users are notified when the status of the service appointment changes to Dispatched and when their assignment is changed or removed. If a user changes or is removed from the service appointment after it’s dispatched, they still receive the notification.
      • When you select both options, users receive assignment and dispatch notifications.
      • If you select neither option, no service appointment notifications are sent.

      Note: The notification received on the Field Service mobile app shows this message: [User] assigned resource [Service Resource] on Service Appointment [Appointment]. This signals to the technician that the appointment is ready to be picked up. This happens at assignment time (when an Assigned Resource is created) or dispatch time (when an assigned Service Appointment is dispatched) based on the settings selected.

Users also receive push notifications in the following circumstances.

• A Chatter text post is made on a work order that the user follows.
• A Chatter file post is made on a work order that the user follows.
• A feed-tracked change is made to a work order that the user follows.
• (iOS only) A feed-tracked change is made to a service appointment that the user follows.
• Additionally, push notifications or chatter posts will push the most recent record data onto the mobile device.

Note: Mobile workers aren’t automatically added as followers to work orders and service appointment records that they’re assigned to. Consider creating an Apex trigger on the service resource object to add or remove users as followers when assignments change.
Offline Priming in the Field Service Mobile App

Learn what data the Field Service mobile app downloads for offline work and how the app syncs with Salesforce.

Syncing Data

When the Field Service mobile app is connected to the Internet, it regularly synchronizes your data with the Salesforce server to ensure data is updated in addition to primed. If the app goes offline, users see a notification in the top navigation bar.

Any changes made while the app is offline are added to the pending uploads queue in the order they occur. The queue shows the status of attempts to upload changes to the Salesforce server. To view the queue, tap the top navigation bar when uploads are pending, or go to the in-app settings in the Profile tab. To delete a pending upload, swipe it left, and confirm the deletion.

The most recent change uploaded to the Salesforce server takes precedence. If a conflict occurs when the app uploads a change to Salesforce, the Pending Uploads queue is paused. Subsequent changes in the queue can depend on a prior change, so the conflict must be resolved before the queue is processed. To resolve a conflict, delete a pending upload or, where possible, tap items to edit the data.

What Is Data Priming?

When a user logs in to the Field Service app, it automatically downloads data related to the user’s assigned service appointments. This process is known as priming, and it ensures that all the data that a mobile worker needs is available even if internet connectivity is lost. If there’s a large volume of data, priming can take a while from the initial app launch, or after a user logs on to the app.

If a network error occurs during priming, an error message appears and priming stops. When you regain connectivity, use the offline priming UI to resync your data.

What Gets Primed?

The data that the app primes for each user is based on the user’s assigned service appointments. References are primed to a depth of 3, except as detailed in this table.

<table>
<thead>
<tr>
<th>Category</th>
<th>What Gets Primed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Objects (Service Appointments, Work Orders, Work Order Line Items, and Assets)</td>
<td>All service appointments for the user within the time range specified in the Salesforce org are primed. This time range defaults to 45 days before and after the current day. Configure this value from Field Service Mobile Settings (under Future Days in the Date Picker and Past Days in the Date Picker). All work orders, work order line items, or assets referenced by the primed service appointments are also primed.</td>
</tr>
<tr>
<td>Other Objects</td>
<td>All objects referenced by the key objects are primed to a depth of 3. This priming means that the app primes any objects referenced by key objects (level 2), and any objects referenced by level 2 objects (level 3).</td>
</tr>
</tbody>
</table>
### Category | What Gets Primed
--- | ---
**For example, if a Service Appointment (SA-0001) references a custom object JellyBean (JB-0002) and JB-0002 references another object Account (AC-0003), all three are primed.**

**Special Objects**

| If a primed object references special object types, those referenced objects are also primed. Special object types include Account, Assigned Resource, Case, Contact, Product, Product Consumed, Product Request, Product Request Line Item, Product Required, and Product Transfer. Note that the entire record for Product Items is not cached. |

**Related Lists**

<table>
<thead>
<tr>
<th>If a record that is being primed is a Key Object, its related list is handled as follows.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Up to 25 records in the related list are fully primed, meaning their record details, associated quick actions, related lists, and other data is all downloaded.</td>
</tr>
<tr>
<td>• Record details ONLY for the rest of the records in the related list are downloaded until the API limit is hit. This limit is determined by the total number of characters downloaded, so the number of records downloaded will vary based on how much data is stored in each one. This limit doesn’t apply to the Articles related list, which has no limit.</td>
</tr>
<tr>
<td>The related list fields are primed, but the metadata around them is not primed.</td>
</tr>
<tr>
<td>A related list of type Service Reports or Content Document is always primed. Only metadata about the files, such as file name and version, is primed. File data isn’t primed.</td>
</tr>
</tbody>
</table>

**Inventory**

| The user’s inventory is primed. For multi-location inventory, the app primes up to 10 locations. For each location, up to 1000 records are primed. |

**Service Reports**

| Service reports and previews associated with primed work orders and work order line items are primed. |

**Knowledge Articles**

| Knowledge articles are primed using the Embedded Service Knowledge SDK. |

**Object Feeds**

| If feeds are enabled in the org, feeds are primed for supported object types using the Feed SDK offline priming feature. Supported objects include Asset, Case, Work Order, Product Request, Product Request Line Item, Service Appointment, and Work Order Line Item. |

**Quick Actions**

| For every object that is primed, the app also primes the page and search layouts. These pages and search layouts contain the list of |
What Gets Primed

quick actions for the object type. Create and Update quick actions are primed from the Quick Actions in the Salesforce Classic Publisher section on the page layout.

Default Developer List View

If a list view is specified under Field Service Mobile Settings > Default Developer List View Name, the work orders and service appointments from the list view are primed.

Flows

All active flows referenced in Field Service Mobile Settings App Extensions are primed. Subflows are primed to a depth of 5. All metadata and quick actions for referenced objects in a flow are primed. If an issue occurs while priming a flow, for example, when an unsupported flow element is found, then the flow isn’t primed.

Price Books

Price books aren’t primed for offline use due to performance considerations.

Appointment Changes and Primed Records

Mobile workers often get new or updated appointments throughout the day. When their appointment schedules change mobile workers get a text notification, and any records associated with the update are automatically primed.

Resolve Priming Errors

Depending on the priming stage and the error type, priming may not be successful. If a network error occurs while records are loading, the priming process is stopped and the user gets an error message telling him to reconnect to the network and try again. Priming can also stop when the server gets too many requests. When this happens, the server returns a time when the user should retry the request.

 Priming Considerations

Some settings, while not necessarily impacting priming, can affect data usage. Consider these settings when configuring your org.

Record Data Cache Time

• This setting controls how long cached data is valid.

• Once this cache time expires, the app checks for updates on the next synchronization or when the record is accessed. Setting this to a low value could cause excessive network usage and reduce performance.

Schedule Update Frequency Time

• This setting controls how often the user’s schedule is checked for updates.

• Consider using the highest possible value to reduce data usage.

• Schedule updates can also be triggered from push notifications to reduce data usage.

Use Briefcase Builder To Share Data Offline

With Briefcase Builder, you can set up briefcases that make selected records available for users and groups to view when they’re offline. The setup wizard helps you easily create, edit, deactivate or delete briefcases to suit your needs.
**Note:** To use Briefcase Builder and access its full functionality, you must install both the iOS and Android Field Service connected apps. Without the connected apps, Briefcase Builder will not work. Use the link below to download the Field Service connected apps.

### In-App Profile Settings in the Field Service Mobile App

Click the gear icon in the top right-hand corner of the Profile tab to view pending uploads, manage linked accounts, and provide feedback to Salesforce about the app.

#### View pending uploads

The upload queue shows pending uploads that the app sends to your org when internet access is restored. Each upload represents individual changes to records that the user has made in the order that they made them. If an upload in the queue encounters an error, the queue will pause until the error is resolved. To delete a pending upload, swipe it left and confirm the deletion.

#### Manage linked accounts

In the account management section, you can log out from your current user profile or log in with a different account.

#### Give feedback

Tap the feedback button to share your feedback about the app with Salesforce. Your Salesforce admin doesn’t receive the feedback you submit.

#### Advanced Settings

Tap the **Flow Refresh** button to immediately refresh the flow metadata from the server.

Tap the **Clear Cache Metadata** button to refresh all metadata from the server. Note that this action does not touch customer data.
Chatter in the Field Service Mobile App

Collaborate on field service jobs using Chatter. Feed tracking must be enabled to display the Feed tab.

To show the Feed tab on the work order overview carousel, enable feed tracking on work orders.

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

Limitations

- The Feed tab in iOS is supported only on the work order, work order line item, service appointment, and case objects. The Feed tab in Android is supported only on the work order, work order line item, and service appointment objects.
- (Android only) Chatter is disabled when the app doesn’t have internet connectivity.
Create Service Reports in the Field Service Mobile App

Service reports summarize the work that was performed by a customer, and can be signed by the mobile worker, customer, and others involved in the work. Learn how to configure the Field Service mobile app to support service report generation and review important considerations about offline service reports and service report previews.

To allow app users to preview and create service reports, make the following configurations.

1. Complete the steps in Create Service Report Templates to prepare for and create service report templates.
2. Ensure that the service appointment page layout includes the Service Reports related list.
3. Add the Work Type field to work order and work order line item page layouts, and make sure users have permission to view it.
4. Add the Service Report Template field to the work type page layout.
5. (Recommended) Select a service report template in the Service Report Template field on each work type in your org.

Create a Service Report in the App

To create a service report in the app, navigate to a service appointment, work order, or work order line item. Tap the action icon, then tap Create Service Report. If the service report template includes a signature section, you’re prompted to Sign & Confirm. If there isn’t a signature section, only a Confirm option appears.

In Android, the Create Service Report action appears on the Service Reports card. If a work order already has a service report, users can edit the existing report, but can’t create additional reports.

Service reports are translated in the language selected in the Service Report Language field on the associated work order. If that field is blank, they use the default language of the person generating the report.

Create a Service Report Offline

Mobile workers can create service report previews while offline. For the iOS app, you can disable offline service report generation.

1. From Setup, enter Connected Apps in the Quick Find box, then select Connected Apps.
2. Click Salesforce Field Service for iOS.
3. In the Custom Attributes list, click New.
4. Set the Attribute key to DISABLE_SERVICE_REPORT_PREVIEW_IOS.
5. Set the Attribute value to “true”. Be sure to include the quotation marks.

Limitations

- Users can’t select a template when creating a service report in the mobile app. Instead, a template is selected based on this order:
  1. The work order template
  2. The work type template
  3. The standard template
- Service report previews have these limitations:
  - Although users can make an offline request to generate a service report, the final PDF is created only when the user’s device is online.
The app doesn’t automatically get the latest data before generating a service report preview, so data in service report previews can be out of date. This limitation applies to online and offline service report previews.

If a reference field exceeds the maximum priming depth of 2, it isn’t populated.

Formula field values can be inaccurate in a preview because they aren’t dynamically calculated.

Roll-up summary fields are blank.

Related lists behave differently in mobile previews.

- The order of records in related lists can differ between the preview and the printed report.
- If a service report template includes a related list, the list populates only if it’s on the page layout of the record that the service report is being generated for.
- On the printed report, all related lists are printed. In the mobile preview, a related list must be on the preview page layout to appear on the preview.

These elements aren’t visible:

- Cases related list
- Headers and footers
- Organization fields
- Certain data fields
- Images in rich text fields on a service report template or service appointment, work order, or work order line item page layout

- The Digital Signature object Place field isn’t supported.
- Text fields and rich text area fields are truncated to 255 characters. This limitation occurs on rich text area fields, other types of text fields, standard fields, and custom fields.

**View Knowledge Articles in the Field Service Mobile App**

Knowledge articles can be attached to work orders, work order line items, and work types to share product specs, instructions, and guidelines with your team.

**Letting App Users View Knowledge Articles**

To let Field Service mobile app users view knowledge articles:

1. Ensure you have Salesforce Knowledge set up in your org.
2. Add the Articles related list to work order and work order line item page layouts.

**Viewing Articles in the App**

To view the Articles related list on a work order, tap Related in the work order carousel. Tap the name of an article to view it. The Knowledge card in the work order overview screen also shows articles attached to the work order or work order line item.

**Limitations**

- (iOS only) If images in knowledge articles are hosted outside of Salesforce, they display normally. Images uploaded to Salesforce don’t load correctly. As an alternative, we recommend using an image link that users can open themselves. You can avoid this issue by selecting the option to use POST requests for cross-domain sessions. Find this option on the Session Settings page in Setup.

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**Editions**

Available in: Salesforce Classic and Lightning Experience

The Field Service core features, managed package, and mobile app are available in Enterprise, Unlimited, and Developer Editions.

Field Service mobile users need the Field Service Mobile user license to access the app.
(iOS only) Some knowledge articles of supported UI languages, such as Japanese, don’t show in the Field Service mobile app.

(Android only) The Knowledge Article action isn’t visible on the Work Order Overview screen. View knowledge articles using the related list.

(Android only) In Knowledge Article details, field names such as Title don’t display on Android devices.

If a device is running in any of Salesforce’s 26 supported languages, the app automatically translates knowledge articles to that language. If the device isn’t running in a supported language, no knowledge articles are shown.

Create Resource Absences in the Field Service Mobile App

Resource absences indicate when a service resource is unavailable to work. During schedule optimization, service resources aren’t assigned to appointments that conflict with their absences. View and manage absences from the Profile tab in the app.

To allow users to create, update, and delete absence records from the app, make the following configurations.

1. Add the Absences related list to the service resource page layout, and customize its fields as needed.
   
   Tip: The date picklist values on resource absences are based on the Picklist Time Interval in Minutes setting on the Field Service Mobile Settings page in Setup.

2. Add the “Non Availability” record type to user profiles.
   
   a. From Setup, in the Quick Find box, enter Users, and then select Profiles.
   
   b. Select the user profile that you want to add the record type to.
   
   c. Under Apps, select Object Settings.
   
   d. Select Resource Absences and click Edit.
   
   e. Next to Non Availability, select the circle for Default Record Type. The checkbox for Assigned Record Type is automatically filled in.
   
   Important: For resource absences created from the app to be considered for schedule optimization, Non Availability must be selected as the default record type.

   f. Click Save.

3. Optionally, hide certain resource absence types from the Profile tab in the app.
   
   a. From Setup, in the Quick Find box, enter Connected Apps, and then select Manage Connected Apps.
   
   b. Select Salesforce Field Service for Android or Salesforce Field Service for iOS.
   
   c. Under Custom Attributes, click New.
   
   d. For Attribute key, enter EXCLUDE_RESOURCE_ABSENCE_TYPES.
   
   e. For Attribute value, enter a comma-separated list of the resource absence types you want to hide from the Profile tab, and then click Save.

   For example, if you want to hide meetings and trainings from the Profile tab, you would enter “Meeting,Training”.

   Note: Under the profile tab, only 10 resource absence records are displayed.

Managing Absences in the App

View and manage absences from the Absences card on the Profile tab. To create a resource absence, click the + icon.
The Type field indicates the nature of the time off from work, and comes with the following values:

- Vacation (default)
- Meeting
- Training
- Medical