



Salesforce Field Service

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SALESFORCE 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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

 **Note:** For usage restrictions that apply to this product, see [this document](#).

[Where Do I Start with Field Service?](#)

Whether you're just starting with Field Service or you're an experienced admin, landing pages are a compass pointing you to resources that help you understand and set up Field Service.

[Field Service Limits and Limitations](#)

Learn about Field Service limits and limitations.

[Field Service Key Concepts and Glossary](#)

List of terms used in Field Service.

[Set Up Field Service](#)

Build and manage Field Service. Set up your workforce, work order tracking and inventory management, and customize the Field Service mobile app to meet your business needs.

[Manage Field Service Work Orders](#)

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 Field Service 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 Field 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 Field 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 Field Service Appointments](#)

Create, schedule, reschedule, and unschedule service appointments. Fix overlaps, group nearby appointments, and fill schedule gaps.

[Manage Service Appointment Bundling in the Field Service Dispatcher Console](#)

Service appointment bundling lets you collect multiple service appointments and define them as a single entity, called a bundle. Your admin can set up automatic bundling. You can also manage bundles manually according to the instructions in this section.

[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.

[Record Product Warranties in Field Service](#)

Use Warranty Terms to record details of the labor, parts, expenses, and exchange options that you provide to rectify issues with products you sell or install.

[Manage Product Service Campaigns in Field Service](#)

Track and manage a product recall, manual firmware upgrade, safety or compliance audit, end-of-life communication, or similar product update.

[Track Availability and Reliability in Field Service](#)

Obtain availability and reliability statistics to measure asset performance, efficiency, and depreciation.

[Manage Field Service Reports](#)

Create service reports for work orders, work order line items, or service appointments and email them directly to customers. Use standard templates, or create variations of your own.

[Manage Field Service Asset Attributes](#)

Improve asset management and help mobile workers efficiently repair and maintain assets by defining and monitoring asset attributes that represent asset health and performance. Then, define threshold monitoring based on recordset filter criteria and track threshold compliance for multiple asset attributes.

[Manage Field Service Outcome-Based Contracts](#)

With Outcome-Based Contracts, service providers can provide their customers with an easy way to assess the compliance of a service contract by letting them track and measure service outcomes. Compliant service contracts ensure high quality of service and customer success.

[Optimize Your Field Service Schedule](#)

Use schedule optimization to create an optimal schedule and help comply with service-level agreements while minimizing travel time, overtime, costs, and no-shows.

[Work in the Field Service 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.

[Field Service Object Fields](#)

Learn about the fields available on Field Service standard objects.

[Set Up Field Service Appointment Assistant](#)

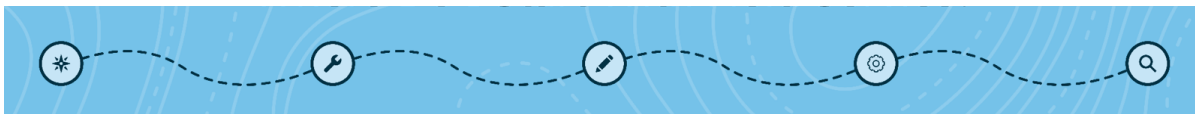
Appointment Assistant helps you keep track of your customers' service experience from the moment they contact you to the moment your mobile worker arrives.

[Field Service Mobile App](#)

The Field Service mobile app for Android and iOS is an all-in-one tool optimized for a modern mobile workforce. Designed as an offline-first app, you can work and have your changes saved without internet connectivity. And the app is highly customizable to meet your business needs.

Where Do I Start with Field Service?

Whether you're just starting with Field Service or you're an experienced admin, landing pages are a compass pointing you to resources that help you understand and set up Field Service.



The landing pages direct you to resources for five key steps in the Field Service journey. If you're new to Field Service, start with Discover Field Service. Here you can find the Field Service glossary to help you learn about key concepts and terms, and curated resources to set you up for success. Next, Build Field Service guides you through the setup process. Each successive step in the journey builds on tasks you've completed on previous landing pages, so follow these in order.

[Discover Field Service](#)

Get to know Field Service, and learn how it can help your business.

[Build Field Service](#)

Make a thoughtful plan, switch on Field Service, and set everyone up for success.

[Customize Field Service](#)

Personalize the way Field Service works with custom options and time-saving automation.

[Optimize Field Service Schedules](#)

Use our Field Service optimization tools (enhanced or standard optimization) to build the most efficient work schedules for your team.

[Monitor and Troubleshoot Field Service](#)

Gather data on your Service Center and assets to gain valuable insights.

Discover Field Service

Get to know Field Service, and learn how it can help your business.

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Learn How Field Service can Help Your Business

What Is Salesforce Field Service?

Learn about Salesforce and how AI is transforming our Service Cloud and Field Service.

- [What is Field Service Management?](#)
- [Playlist Service Cloud: Field Service Demo](#)
- [Key Concepts and Glossary](#)

How Can It Help Me?

Learn how to work smarter with Salesforce Field Service.

- [Elevate Every Field Service Experience](#)
- [Customer Story: Mobile Technologies, Inc.](#)
- [Trail: Digital Transformation Trends](#)
- [Discover the Value of Field Service Management Software](#)

Learn from the Experts

Find resources to guide you in your setup journey.

- [Salesforce Professional Services](#)
- [Field Service Trailblazer Community](#)
- [Trailhead Academy](#)
- [Salesforce Field Service Ask an Expert Office Hours](#)
- [Considerations When Selecting a Consulting Partner](#)
- [Salesforce Admins: Upcoming and Recent Events](#)

More Questions?

More Help!

- [PDF: Field Service License Comparisons](#)
- [Salesforce Admins: Latest Blog Posts, Podcasts, Videos, and Resources](#)

Build Field Service

Make a thoughtful plan, switch on Field Service, and set everyone up for success.

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Build Your Field Service Foundation

Plan Your Experience

Get the most out of setting up Field Service.

- [Set Key Performance Indicators](#)
- [Get Ready for Scheduling and Optimization](#)
- [What's Schedule Optimization?](#)
- [What's Available in Enhanced Scheduling and Optimization](#)
- [Adopt and Implement Enhanced Scheduling and Optimization \(Learning Map\)](#)
- [Field Service Mobile App](#)

	<ul style="list-style-type: none"> • Common Field Service Inventory Management Tasks • Field Service Data Objects <p>More Resources:</p> <ul style="list-style-type: none"> • Video: Expert Implementation Tips • 5 Design Strategies That Help Field Service Workers Love Their Jobs More • Trail: Organizational Change Leadership • Trail: Release Readiness Strategies • Video: Change Management in Salesforce Sandboxes
Enable Field Service	<p>Activate these features and settings.</p> <ul style="list-style-type: none"> • Enable Field Service • Install the Managed Package • Download the Connected App • Recommended: Install the Reports and Dashboard <p>Enable Field Service for Contract Mobile Workers and Dispatchers:</p> <ul style="list-style-type: none"> • Trail: Create and Customize an Experience Builder Site • Add the Dispatcher Console to an Experience Builder Site • Guidelines for Setting Up Contractors • Give Contractors Access to the Mobile App
Give Users Access	<p>Grant users permission to use Field Service, the Field Service mobile app, and Briefcase for offline access.</p> <ul style="list-style-type: none"> • Manage Permissions • Create Permission Sets • Download the Field Service Connected App for the Mobile App • Give Users Access to the Field Service Mobile App • Trail: Offline Briefcase • Set Up Briefcase for the Field Service Mobile App
Set Up Field Service	<p>Get Field Service up and running for your team.</p> <ul style="list-style-type: none"> • Set Up Territories, Operating Hours, and Shifts • Set Up Work Order Management • Set Up Your Workforce • Set Up Your Inventory • Get Ready for Scheduling and Optimization • Enable Enhanced Scheduling and Optimization • Set Up Field Service in Experience Cloud Sites • Set Up the Field Service Mobile App <p>More Resources:</p>

- [Trail: Get On The Road With Field Service](#)
- [Trail: Supercharge Field Service](#)

Customize Field Service

Personalize the way Field Service works with custom options and time-saving automation.

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Shape How Field Service Works

Customize the Dispatcher Console	<p>Tailor the dispatcher console to work better for your business.</p> <ul style="list-style-type: none"> • Customize the Console • Trail: Customize Console Settings • Trail: Customize Your View
Customize the Mobile App	<p>Craft custom actions, tabs, screens, and functions for your mobile workforce.</p> <ul style="list-style-type: none"> • Learn More About Mobile Settings • Set Up Custom Actions • Customize the Look and Feel • Brand the Mobile App • Customize Push Notifications • Trail: Customize User Settings • Customize and Extend the Mobile App with Lightning Web Components
Work with Flows	<p>Automate processes and improve efficiency with flows.</p> <ul style="list-style-type: none"> • Trail: Flow Builder Basics

	<ul style="list-style-type: none"> • Automate Your Business Processes • Video: Get Started with Flow Builder • Build Flows in the Mobile App • Considerations for Using Flows in the Mobile App • Set Up the Mobile Widget • Salesforce Admins – Automation and Workflows
Work with Schedules	<p>Build work schedules for your team.</p> <ul style="list-style-type: none"> • Improve Performance with Guidelines for Service Territories • Trail: Customize a Scheduling Policy • Trail: Shift Appointments in the Dispatcher Console • Schedule an Appointment Automatically
Resources for Developers and Advanced Admins	<p>Enhance your implementation using these additional resources.</p> <ul style="list-style-type: none"> • Video: Salesforce Admins: – Use Low-Code Tools to Customize Your Salesforce Org • Trail: Request a Developer Edition Org for Trailhead • Field Service Developer Guide
Extend your Field Service Experience	<p>These optional add-ons help your team get more done.</p> <ul style="list-style-type: none"> • Trail: Visual Remote Assistant • Set Up Visual Remote Assistant (optional purchase) • Video: Appointment Assistant Self-Service Scheduling • Set Up Appointment Assistant Self Service Scheduling (optional purchase) • ServiceMax Asset 360 for Salesforce (optional purchase)

Optimize Field Service Schedules

Use our Field Service optimization tools (enhanced or standard optimization) to build the most efficient work schedules for your team.

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Optimize Your Schedule

Get Started	<p>Learn about optimization and how to set it up so that you can build better schedules.</p> <ul style="list-style-type: none"> • What's Schedule Optimization? • How Does the Field Service Optimization Engine Work? • Get Ready for Field Service Scheduling and Optimization • Learn What's New and Available in Enhanced Scheduling and Optimization • Explore Our Resources to Adopt and Implement Enhanced Scheduling and Optimization • Transition to Enhanced Scheduling and Optimization
Optimize Your Schedule	<p>Refine and optimize your team's schedule.</p> <p>Global Optimization:</p> <ul style="list-style-type: none"> • Optimize Your Schedule <p>In-Day Optimization:</p> <ul style="list-style-type: none"> • Optimize Today's Schedule <p>Resource Optimization:</p> <ul style="list-style-type: none"> • Optimize a Single Resource's Schedule • Create Scheduling Automation with Recipes for Common Events (standard optimization)
Explore Metrics and Troubleshoot Optimization	<p>Learn how to fix issues and gain useful insights into optimization.</p> <ul style="list-style-type: none"> • Explore Metrics in Field Service Optimization Hub (Enhanced Scheduling and Optimization) • Video: Optimization Insights (standard optimization) • Gain Visibility Into Optimizations • Video: Check Data Issues Affecting Optimization Quality Using Health Check • Monitor Schedule Optimization Requests
Help with Schedules	<p>Account for additional scheduling needs and fine-tune your schedule before or after optimization.</p> <ul style="list-style-type: none"> • Maximize Your Scheduling Performance • Explore Holiday Management (Enhanced Scheduling and Optimization) • Account for Flexible Breaks with the Resource Availability Work Rule Type (Enhanced Scheduling and Optimization) • Support Locationless or Virtual Service by Using the Off Site Appointment Field (Enhanced Scheduling and Optimization) • Support More Accurate Travel Times and Schedules with Travel Modes (Enhanced Scheduling and Optimization)

- [Get Recommendations with Field Service Appointment Insights \(Enhanced Scheduling and Optimization\)](#)
- [Check Rule Violations on the Gantt](#)
- [Group and Schedule Nearby Work with Appointment Bundler](#)
- [Control How Much Work is Scheduled with the Count Work Rule Type \(Enhanced Scheduling and Optimization\)](#)
- [Further Explore How Much Work is Scheduled by Managing Work Capacity \(Enhanced Scheduling and Optimization\)](#)
- [Enable Service Appointment Sliding to Maximize Schedules \(Enhanced Scheduling and Optimization\)](#)

Monitor and Troubleshoot Field Service

Gather data on your Service Center and assets to gain valuable insights.

EDITIONS

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



Keep up with your Field Service assets, and get everything running smoothly.

Set Up Operational Reporting

Gain insights into your Service Center and assets.

- [Create Field Service Reports](#)
- [Set Up Salesforce Labs Field Service Dashboards](#)
- [Explore Metrics in the Optimization Hub](#)
- [Track Asset Availability and Reliability](#)
- [About the Field Service Analytics App \(optional purchase\)](#)
- [Field Service Analytics Pre-Built Dashboards](#)
- [AppExchange Field Service Dashboards](#)

More Resources:

	<ul style="list-style-type: none"> • Trail: Gain Insight with Einstein Discovery • The 8 Metrics That Matter - And How To Improve Them
Help Your Mobile Workers Arrive Safely and On-time	<p>View your mobile worker's location.</p> <ul style="list-style-type: none"> • Set Up Appointment Assistant Real-Time Location (optional purchase) • Field Service Mobile Security • Automatic Status Change
Keep Your Service Center and Mobile App in Top Shape	<p>Keep things running smoothly with these resources.</p> <ul style="list-style-type: none"> • Video: Salesforce Admins: Release Resources • Test Your Field Service Configuration with Health Check • Field Service Mobile App FAQ

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

Limit	Details
Maximum number of service resources per user	1
Maximum number of service territories in a service territory hierarchy	10,000
Maximum number of work orders in a work order hierarchy	10,000
Maximum number of work order line items in a work order line item hierarchy	10,000
Maximum number of maintenance work rules per maintenance plan	25,000
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.

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

Limit	Details
	<p>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.</p> <p>Each maintenance work rule can generate work order and work order line item records.</p> <p>For example:</p> <ul style="list-style-type: none"> • If every maintenance asset for a maintenance plan contains two maintenance work rules, the practical limit on maintenance assets is less than 1,300. • If a maintenance plan has four maintenance work rules, the practical limit on maintenance assets is less than 650. <p>Also, a maintenance plan with a maintenance work rule using COUNT is limited to 2,000 maintenance assets.</p> <p>Salesforce recommends that you add no more than 5 maintenance work rules to each maintenance plan or asset.</p> <p> 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.</p>
Maximum number of days that can be specified in the Generation Horizon on a maintenance plan	365
Maximum number of years that can be specified in the Generation Timeframe on a maintenance plan	20 On Maintenance Plan, see the Generation Timeframe field and Generation Timeframe Type field (days/week/month/year). The Generation Timeframe can't be more than 20 years.
Maximum number of locations in a location hierarchy	10,000
Maximum number of signature blocks on a service report template	20
Maximum number of values in the Signature Type picklist on digital signatures	1,000
Maximum number of child assets per asset	2,000
Maximum number of levels in an asset hierarchy	50
Maximum number of assets in an asset hierarchy	10,000
Maximum size of asset hierarchies that can be viewed in the tree grid view	500

Limit	Details
Maximum number of appointments that can be scheduled at once with the Group Nearby Appointments action	50
Maximum runtime in seconds for the Group Nearby Appointments action	60
Maximum number of coordinates in a map polygon	3,200
(Recommended) Maximum number of polygons in an org	30,000 Exceeding this limit can cause dispatcher console performance issues. To avoid such issues, set the sharing of the Map Polygon object to Private, and use sharing so that dispatchers only see polygons that are relevant to them.
Maximum number of report markers on the Gantt map	500
Maximum number of rows on the Gantt	500
Maximum number of service appointments in the appointment list	3,000
Maximum number of service appointment sharing records that can be processed when updating service appointment statuses in bulk	50,000
Maximum number of skills displayed in the Gantt Skills filter panel	2,000
Maximum number of operating hours records displayed in the Default Operating Hours lookup field on the Global Actions > Appointment Booking settings page	2,000
Maximum number of service appointments displayed in the Long-Term view in the Gantt	1,000
Maximum number of resource absences displayed in the Long-Term view in the Gantt	200
Maximum number of active scheduling recipes per category	75
Maximum number of active scheduling recipes per org	1,000
Maximum number of service territories that can be viewed without searching	2,000
Minimum screen resolution for a smooth dispatcher console experience	1366 x 768 pixels (minimum) 1920 x 1080 pixels (recommended)

Schedule Optimization Request Limits

Limit	Details
Maximum optimization requests per hour per org	3,600
Maximum service appointments optimized per rolling 24 hours	50,000 With enhanced scheduling and optimization, the limit is the greater of 50,000 or 500 per Field Service Scheduling license. To check whether you're operating within the limit, monitor the actual consumption in Optimization Requests, Last 24 Hours under Company Information in Setup.
Maximum service appointments optimized per request	5,000
Maximum service territories optimized in a request	100
Maximum service resources optimized per request	500
Maximum days optimized per request	21
Maximum number of objects passed to the optimization service in 1 request (for example, service appointments + related objects such as skill requirements and assigned resources)	45,000 This limitation doesn't apply to enhanced scheduling and optimization.
Maximum number of objects returned synchronously for In-day optimization (more objects are returned asynchronously)	1,000 This limitation doesn't apply to enhanced scheduling and optimization.

 **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.
- If both primary and secondary territories are selected, the service resource is shown in the secondary territory only if it has the same time zone as the primary territory. If the secondary territory has a different time zone, it's shown only in the primary territory. If only a secondary territory is selected, the resource is shown under the secondary territory regardless of the time zone.
- 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.
- 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](#).

Document Builder

- A document template can have only one signature of each type, such as Customer, Partner, Technician, or Manager. If you expect to require two people with the same role, say Customer, to sign the same document, you can assign numbered types, such as Customer1 and Customer2, to your template.
- A related record table can have up to 1,000 records.
- The size limit for a Service Document is 300 MB.
- On the desktop site, you can create document templates for all objects, Work Order, Work Order Line Item, and Service Appointment, and generate PDFs from these entities on your desktop. The Field Service mobile app lets you create service documents from the Service Appointment and Work Order objects on iOS and only from Service Appointment on Android.
- PDFs can be up to 50 pages.
- A service document template can contain only one signature per type. To collect multiple signatures on a service document, 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 document, 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.
- You're limited to 10,000 documents per Salesforce org per month and 250 documents per user per month. We block document generation if you exceed this limit
- On related list field tables, lookup fields show field IDs instead of field values.
- You can't use URLs to render images.
- Account names don't appear in service documents when the Account field isn't added to the template.
- If you have multiple image galleries on a template, the same set of images repeat across all image galleries.
- You must add the service document template field must be added to work order and service appointment page layouts.
- When creating a service document from a work order record detail page on the Field Service mobile app, users see a service appointment template instead of a work order template.
- With rich text, only black appears on documents.
- The parent record field value is empty in service documents.
- When you're designing a template, refreshing the browser can result in missing fields. If you need to refresh, use the **Refresh** button on the design template page instead of refreshing the browser.

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 can 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.
- If you aren't using Enhanced Scheduling and Optimization, 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 scheduling policies.
- Match Fields work rules are supported for schedule optimization only when using Enhanced Scheduling and Optimization.
- The Emergency Chatter action doesn't support multiday service appointments, bundled service appointments, or service appointments with a scheduling dependency.

- Schedule optimization is supported only for service appointments whose parent record is a work order or work order line item.
- Scheduling and optimization is supported only for service territories with at least one primary service 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 or resource absence doesn't include an address, the scheduling optimizer assumes that the appointment is at the assigned resource's home base. This could cause the optimizer to delete the Travel From value, if it exists, from the previous service appointment or resource absence with an address. To avoid this, add the resource's home base address (the Service Territory Member address or, if there isn't a specified address, then the Service Territory address) to the locationless service appointment or resource absence.
- 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 requirement 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 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.
 - Shifts assigned to secondary territories aren't considered during resource schedule optimization. Instead, use only shifts without territories or use time slots. This limitation doesn't apply to enhanced scheduling and optimization.
- 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.
- Using seconds or milliseconds in the service appointment Scheduled Start and Scheduled End fields isn't supported. For example, if Scheduled Start is set to 8:00:00 AM and Scheduled End is set to 8:00:45 AM, the optimization engine can unschedule the service appointment because the start and end time is considered the same (8:00 AM). Using seconds or milliseconds in the following service appointment fields also isn't supported:
 - Due Date

- Earliest Start Permitted
- Arrival Window Start
- Arrival Window End
- Any DateTime field used in work rules of type Field Service - Match Time Rule in your scheduling policy, including custom fields.

Using seconds or milliseconds in the Start and End DateTime field of the following objects isn't supported:

- Resource Absence
- Time Slot
- Shift
- Service Resource Skill
- Service Territory Member
- Custom objects used in Enhanced Match Rules

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.

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.
- Predictive travel isn't supported with multiday work scheduling. In multiday work scheduling, the exact departure time for each day is unknown, so SLR is used, corresponding to the fastest travel time (the best SLR travel time that you would get on a night slot with minimum traffic). Complex work uses point-to-point predictive routing in optimization, and the most optimistic SLR travel time for platform scheduling.
- 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 aren't 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**.

SEE ALSO:

- [Install the Field Service Managed Package](#)
- [Field Service Mobile App Considerations](#)
- [Considerations for Multiday Scheduling](#)

Field Service Key Concepts and Glossary

List of terms used in Field Service.

Key Concepts

Agent

An agent handles inbound calls, creates work orders, and books appointments from the service console. An agent must have the Field Service Agent permissions set.

Appointment Booking

When a service appointment requires a specific execution time for a customer-facing service, you can assign an arrival window using appointment booking. The arrival window assures that the service appointment starts within the defined time range. Customers can book their own appointment, and set the arrival window from available time slots, using the appointment assistance feature.

Asset

An asset is an item of commercial value that a customer has purchased and installed. An asset can have a warranty or entitlement for a service according to a service contract. The Asset object enables tracking relevant performance indicators, such as asset downtime. An asset can be serviced according to a maintenance plan or on an as-needed basis. When an asset requires service according to a maintenance plan, a work order is generated automatically.

Dispatcher

A dispatcher uses the Dispatcher console to monitor the execution of service appointments assigned to specific groups of resources by territories and handles exceptions using the Field Service tools. A dispatcher must have the Field Service Dispatcher permissions set and a Field Service Dispatcher license.

Mobile Worker (Service Resource)

A mobile worker (also called a service resource or technician) is a worker that executes assigned service appointment jobs according to availability. A mobile worker can update job progress in the Field Service mobile app.

Resource Availability

Time intervals during which a resource can be scheduled, composed of operating hours, time slots, and shifts.

Scheduling and Optimization

Scheduling is the process by which service appointments are assigned to mobile workers or crews. Manually constructing an efficient field service schedule can be a complex, time-consuming operation. Field Service's Scheduling and Optimization does the work for you by generating an optimal schedule according to scheduling policies that define your organizational priorities and constraints. Schedule optimization helps you comply with service-level agreements and minimize travel time, overtime, costs, and no-shows.

You can define the scope of optimization in different ways.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- Global optimization—Assesses time slots and mobile worker options to schedule upcoming appointments in the best order.
- In-Day Optimization—Optimizes the schedule for one or more territories on the day of service.
- Resource Schedule Optimization (RSO)—Optimizes a specific mobile worker’s day. Reshuffle—Moves existing appointments to schedule a high-priority appointment.

Service Appointment

A service appointment provides the scheduling and assignment details of a field service visit—onsite or remote—to a customer. A service appointment can be with or without an arrival window that is derived from a customer’s appointment time.

Service Territory

A service territory is the most basic grouping of service resources in Field Service. A grouping can be based on geographic regions, such as cities, counties, and neighborhoods, or according to product lines or type of customer. You can assign service resources to territories and create territory hierarchies, depending on how your business is structured.

Work Order

A work order is a request for field service work. It includes the work type and other relevant information for scheduling the service appointment. A work order can include several work order line items representing different types of work that must be done on various assets to be worked on.

Glossary Terms

The frequently used terms

Term	Description
Absence	A time period when the resource isn’t available for scheduling. An absence can have locations. You sometimes need the resource absence location to schedule a service appointment before or after an absence. Absences with a location can also have travel times associated with them. Also referred to as Resource Absence.
Admin	A user who manages Field Service features and sets up user permissions for your org. An admin must have access to Field Service settings.
Arrival window	A time frame that limits the scheduled start time of a service appointment that was scheduled using appointment booking. The scheduled start time must be between the start time and the end time of the window.
Asset attributes	Describes the state of an asset and can represent its health and performance. Asset attributes provide a better understanding of the condition of assets and let mobile workers repair and maintain those assets in the field more efficiently. An asset usually has multiple attributes.
Assigned resource	A service resource who is assigned to a service appointment and has relevant information, such as the travel time and distance.
Briefcase Builder	This tool lets admins configure datasets of records that are required for mobile resources to interact with the Field Service mobile app when they’re offline.
Capacity-based resource	A resource representing one or more service resources with a bucket of working hours or service appointments per period (for example, 100 working hours per week or four service appointments a day). Scheduling service appointments to a capacity-based resource is as easy as scheduling to a regular service resource.

Term	Description
Check rules	A logic service that verifies whether a service appointment conforms to the scheduling rules. When manually scheduling a service appointment, you can use this service to check whether the scheduling violates a scheduling rule.
Complex work	A composite service appointment, composed of interdependent service appointments, each of which is performed separately. The appointment dependency defines the time relationship between service appointments. For example, a service appointment can only be started after the completion of another service appointment.
Crew	A team of service resources scheduled to work together. Resources are allocated to a crew for a specific time period. During an allocation, crew members can only be scheduled as part of a crew.
Day of service	The actual execution day of the planned job.
Dispatcher console: Gantt	A visual representation in the form of a Gantt chart of the service resources and their appointments over time. The UI provides easy access to many service appointments and resource-related activities.
Dispatcher console: Map	A view that displays a map of service appointments, resources' home bases, and last known locations. You can add other objects with locations.
Drip feed	A method for dispatching service appointments, one by one, as the previous service appointments are completed.
Duration	The time that a service appointment takes to complete. Duration is used to optimize the schedule.
Enhanced Scheduling and Optimization	The Enhanced Scheduling and Optimization engine is gradually replacing the optimization functionality and associated manual and semiautomatic scheduling services. This engine provides an architecture and services that are more efficient and improve scalability, performance, and schedule quality. It includes innovative capabilities such as Travel Modes, Service Appointment Sliding, Multiple Flexible Breaks, Scheduled Jobs, Holiday Management, Offsite Appointments, and Optimization Hub. As of Summer '23, new Salesforce orgs have Enhanced Scheduling and Optimization enabled for all territories by default. Existing orgs can switch to use Enhanced Scheduling and Optimization for all service territories or per territory.
Entitlement	The customer service level (for example, Basic, Premium, VIP) which dictates the response time.
Field Service mobile flow	A flow that is supported in the Field Service mobile app, and uses Flow Builder and the Field Service Mobile Flow type.
Field Service permission sets	<p>Allow users to access Field Service features by assigning them permission set licenses. Field Service includes three permission set licenses related to the managed package and mobile app.</p> <ul style="list-style-type: none"> • Field Service Dispatcher—Provides access to the dispatcher console. • Field Service Scheduling—Allows the user to be shown on the dispatcher console Gantt and to be included in scheduling and optimization. • Field Service Mobile—Provides access to the Field Service mobile app.
Field Service settings	<p>You can adjust your Field Service settings in two places.</p> <ul style="list-style-type: none"> • Setup—Where you initially enable Field Service and set up features. • Tab—Used to control adjustments.

Term	Description
Flexible breaks	Admins can set a break duration and a time window for when the break must occur relative to the start of the mobile resource's day.
Gantt chart	See Dispatcher console: Gantt.
Get Candidates	An action that suggests which service resources can be assigned to a service appointment and when.
Grade	A numerical score given to an assignment or an appointment slot according to the relative fulfillment of a set of objectives.
Holiday management	This feature lets admins account for business holiday closures. Admins can refine working hours by updating operating hours so that service appointments aren't scheduled on holidays.
Home base	A location where a resource starts and ends work each day. You can temporarily change the home base of a resource. You can define a home base at the Service Territory level or Service Territory Member level, which overrides the Service Territory level.
Horizon or scheduling horizon	<ul style="list-style-type: none"> • The date range for scheduling a service appointment. • (Mobile) The time period for priming service appointments.
Inventory	The available serialized or not serialized products in a fixed location, such as a warehouse, or a mobile location that represents the service resource's stock. Product transfers track the movement of inventory from one location to another. The inventory numbers at storage locations are updated automatically to reflect transfers.
Maintenance plan	Defines how often maintenance visits occur according to a schedule or based on usage criteria. For example, maintain the generator every 1,000 operating hours, start from 0 and stop at 100,000 hours. The Maintenance Plan automatically generates work orders for future visits.
Manual scheduling	A process by which a dispatcher manually creates assignments. Manual scheduling enables manual intervention in the scheduling process.
Map	See Dispatcher console: Map.
Mobile actions	Quick actions, global actions, flows, and app extensions that 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.
Mobile push notification	A push notification in the mobile app that informs the mobile workforce of events, such as status changes, approaching appointments, scheduling changes, or comments added. To create customized notifications, install the connect app and use the Notification Builder Platform.
Multi-day work	A service appointment that spans over multiple days. The maximum period is 8 weeks.
Notifications Center	A UI display of notifications relevant to the dispatcher, such as scheduling results and other action feedback information.
Operating hours	The times when field service work can be performed by service resources (weekly recurring availability per resource and per territory), customer accounts (visiting hours per customer), and appointment booking. Operating hours consist of the time zone and time slots, which can be broken down into arrival windows.

Term	Description
Optimization Hub	This set of dashboards shows the impact and improvements of an optimization request, formatted as standard KPIs. The optimization hub enables users to gain visibility across the scheduling of service appointments within service territories.
Outcome-based contracts	This feature lets service providers define KPIs for their customers to measure and track service outcomes and assess the compliance of service contracts. For example, a contract is compliant if an electric vehicle's battery is strong as indicated by the charging speed of the battery. Tracking the vehicle's charging speed over a time indicates that its battery is strong and therefore, that the contract is compliant.
Priming	Loading of data (records and metadata) to a mobile device according to the scheduling horizon, so that mobile workers can perform their job while offline.
Priority	The importance or urgency of a service appointment, on a numeric scale. The default priority range is the 1–10 scale, where 1 is the highest priority and 10 is the lowest. You can also choose to use a scale of 1–100. Used by the optimization process to ensure that when there's limited resource availability, service appointments are scheduled according to importance.
Product item	A part for services that can be requested, required, transferred, and consumed in field service work. The Product Item object is used across clouds (Marketing, Sales, Industries, and Commerce).
Product request	A request for one or more parts.
Product transfer	A transfer of inventory between locations.
Relevance group	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.
Relocation	A type of service territory membership in which a service resource is temporarily moved from one territory to another. A relocation can also temporarily change the resource's home base.
Resource efficiency	The relative speed at which a resource works (1 = the nominal rate). For example, if a service appointment is expected to take 1 hour, it takes a resource with an efficiency of 0.5 2 hours.
Return order	A record of inventory returns or repairs.
Scheduled job	Scheduled jobs are Apex jobs scheduled to run at a given time in the future. In Field Service, scheduled jobs are used to group a set of data to submit for optimization or share records with user territories.
Scheduled start and scheduled end	A scheduled time slot for a service appointment.
Scheduling dependencies	Scheduling dependencies between related service appointments helps you account for situations when mobile resources must perform related service appointments in a certain order. For example, ensure that a particular appointment can't start until a related appointment is completed or that two appointments must start at the same time.
Scheduling policy	A set of work rules and service objectives that guide the schedule optimizer in its decisions. You can use scheduling policies to promote or de-emphasize factors, like business priorities, travel time, and customer preferences. For example, if an organization has 100 resources, work rules look at various criteria, such as availability, territory assignment, skills, driving distance, to reduce the number

Term	Description
	of potential candidates to five. These five candidates are then analyzed by service objectives to assign a grade to each candidate. The grade determines who, out of the five, is the best resource and time slot to schedule.
Scheduling recipe	A scheduling automation that is triggered by certain events to solve overlaps (caused by urgent service appointments or late ending of service appointments) or free spaces (caused by service appointments ending early or canceled).
Serialized product	A product with a serial number whose movements between locations, such as warehouses, depots, or mobile workers, can be tracked.
Service appointment list	A Field Service view that displays service appointments. The list provides easy access to service appointments and actions in the Gantt view of the Dispatcher console.
Service appointment number	A unique service appointment identification number.
Service appointment status or status category	A lifecycle sequence of stages or statuses through which a service appointment passes. The lifecycle covers the time from when the service appointment enters the organization until the time it's completed. Each status category can include several statuses.
Service appointment sliding	This feature enables moving service appointments on the Gantt for the same resource to an earlier or later time within the resource's shift. Appointment sliding lets you free up time for a new service appointment when using appointment booking and scheduling operations.
Service appointment time properties	<p>Field Service includes the time properties that are relevant for the four standard Match Time Rule work rules.</p> <ul style="list-style-type: none"> • 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 that 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 End is equal to or earlier than the Arrival Window End.
Service contract	A contractual agreement to provide service to a customer based on their profile. Service contracts represent different types of customer service, such as subscriptions or service level agreements (SLAs) that stipulate a certain due date or a start-by date. The products covered by a service contract are the contract line items.
Service objective	A logic entity that evaluates and grades assignments or schedules. Service objectives enable using business priorities to choose the best candidate for the job. For example, if the top priority is to minimize travel, the qualified candidate closest to the job site is the best choice.
Service report	A customer-facing report summarizing the status of service appointments and work orders.
Service resource	See Mobile worker.
Service resource list	A part of the Gantt view that displays all the resources in the system. The Service Resource List provides easy access to resources and actions in the Gantt view of the Dispatcher console.

Term	Description
Shift availability	A set of working periods for your shift-based workforce, such as contractors or on-call staff. You can create and assign shifts for particular dates and times when you need coverage.
Skill	An ability required to perform a field service task. You can assign skills to service resources to represent certifications or areas of expertise. You can add skill requirements to work types, work orders, and work order line items to indicate the skills required to complete the work. Skills can also have skill levels.
Time-phased	Refers to a property whose value varies at specified times. For example, time-phased skills of a crew that change when a resource is added or removed from the crew (applies to Skills, Territory Membership, and Crew Membership).
Time sheets	A tool that tracks the time that your field service employees spend on tasks. Time sheets are mainly used for payment and charging.
Travel modes	Travel modes reflect transportation type (car, light truck, heavy truck, bicycle, or walking), the use of toll roads, and hazmat considerations. Travel modes enhance predictive travel by providing more accurate travel time predictions and improving the completion rate of service appointments.
Work order	A request for one-time or recurring field service work. It includes the work type and all relevant information for scheduling the service appointment. A work order can include several work order line items.
Work plan or work steps	A work plan is a set of prescribed work steps that guide frontline and back-office workers on how to complete a work order. By following steps in work plans, field service teams can complete assignments quickly, consistently, and with less guesswork.
Work rule	A combination of rules determines which candidates can complete the job based on business policies and organizational goals. A work rule determines whether the candidates have the required skills and if they're available in the right territory at the right time. For example, a rule can require that a resource can be assigned to a service appointment only if they're both in the same district.
Work type	A template that is used for common field service work, such as cable installations or furnace repairs. It includes the work duration, skills required for a specific work type, and so on.

SEE ALSO:

[Concepts, Products, and Services](#)

Set Up Field Service

Build and manage Field Service. Set up your workforce, work order tracking and inventory management, and customize the Field Service mobile app to meet your business needs.

[Enable Field Service](#)

Enable Field Service to start using Field Service features.

[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.

[Manage Field Service Permissions](#)

Give your team access to Field Service features. Create and assign standard permission sets and permission set licenses. Then add customizations to suit your business needs.

[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.

[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.

[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.

[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.

[Get Ready for Field Service Scheduling and Optimization](#)

Define your service appointment lifecycle, configure appointment booking settings, and get to know your Field Service scheduling policies, optimization settings, and sharing settings. As of Summer '23 new Salesforce orgs have Enhanced Scheduling and Optimization enabled by default for all service territories. Existing orgs can continue to opt in and enable the enhanced engine for all or selected service territories. The enhanced engine is an improvement of the optimization functionality and associated manual and semiautomatic scheduling services. The enhanced architecture and services are more efficient and improve scalability, performance, and schedule quality.

[Set Up Field Service Appointment Bundling](#)

Group short appointments at nearby or same-site locations to create a bundle.

[Setting Field Service Key Performance Indicators](#)

Key Performance Indicators (KPIs) are crucial when scoping your business's needs and aligning them with what Field Service provides. For example, KPIs can help you make smart business decisions by setting efficient schedules and sending workers with the right skills and tools for the job.

[Set Up for Product Warranties in Field Service](#)

To have new assets automatically pick up the standard warranty for a product, set up a flow, process builder, or trigger.

[Set Up Product Service Campaigns in Field Service](#)

If your Salesforce org was created before Spring '21, add the Product Service Campaign Item related list to Product Service Campaign.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

[Set Up Field Service Asset Availability and Reliability Reporting](#)

Get information on asset availability and reliability by recording details of asset downtime in Field Service.

[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.

[Set Up Visual Remote Assistant for Field Service](#)

Promote sustainability using Visual Remote Assistant for Field Service, boost sales, and improve efficiency while reducing costs by delivering service from anywhere.

[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.

[Set Up After Field Service Sandbox Refresh](#)

After you refresh a sandbox for Field Service, you must verify that sandbox remote sites are active. Then configure your Salesforce sandboxes to use independent remote sites for street-level routing (SLR) and optimization services, and verify your default policies and operating hours.

[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.

[Manage Data Integration Rules for Field Service](#)

Set up data integration rules to ensure that service resource travel time is accurately calculated.

[Set Up Salesforce Labs Field Service Dashboards](#)

Download a free package of Field Service dashboards and reports from Salesforce Labs AppExchange. Track metrics and performance for many key items of interest in a field service operation. Use these optional dashboards to create customized reports and dashboards for your operation's specific needs.

SEE ALSO:

[Field Service Mobile App](#)

[Field Service Developer Guide](#)

[Trailhead: Get on the Road with Field Service](#)

[Field Service Objects](#)

[Field Service Object Fields](#)

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.

If you don't have a Field Service add-on license, an option to enable work orders is on by default. If Field Service was enabled, but the license was removed or has expired, that option is off 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.

4. Optionally, update the sharing settings. See [Limit Access to Field Service Records](#).
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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To enable Field Service:

- Customize Application

SEE ALSO:

[Trailhead: Field Service Basics](#)

[Enable Enhanced Scheduling and Optimization](#)

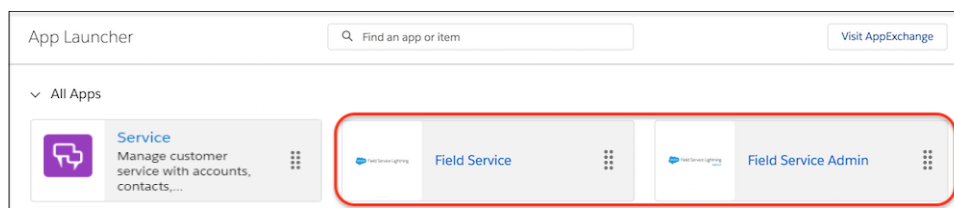
Install the Field Service Managed Package

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To install the Field Service managed package:


- Customize Application

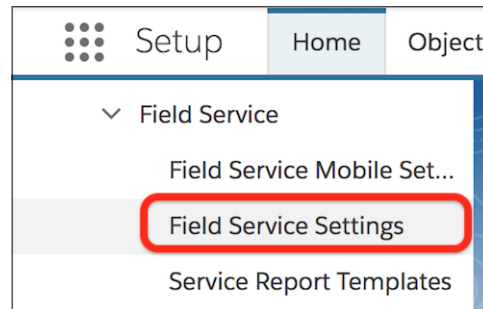
To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

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



SEE ALSO:

- [Trailhead: Supercharge Field Service](#)
- [Field Service Mobile App](#)
- [Field Service Limits and Limitations](#)
- [Enable Enhanced Scheduling and Optimization](#)
- [Transition to Enhanced Scheduling and Optimization](#)

Manage Field Service Permissions

Give your team access to Field Service features. Create and assign standard permission sets and permission set licenses. Then add customizations to suit your business needs.

[Get to Know Field Service Personas](#)

Learn about the different user personas in a typical field service implementation. Use standard and custom permission sets to tailor Field Service to your users' needs.

[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.

[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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Get to Know Field Service Personas

Learn about the different user personas in a typical field service implementation. Use standard and custom permission sets to tailor Field Service to your users' needs.

Field service players usually fall into one or more of the following profiles.

User persona	Description
Admin	A Salesforce admin integrates Field Service features and sets up user permissions as needed.
Agent	Agents handle inbound cases, create work orders, and book appointments using global actions.
Contractor	Contractors are mobile workers, dispatchers, or office staff who are temporary or seasonal. Our Contractor and Contractor Plus licenses can be purchased as per-user-per-month or login-based licenses. The per-user-per-month option provides universal access to more regular contractors, while our login-based licenses are a cost-effective and flexible option for employers with large numbers of contractors.
Dispatcher	Dispatchers build and manage appointments, assign mobile workers, and optimize the schedule based on worker skills, routing, and job priority. If your business combines the dispatcher and agent roles, use the Field Service - Dispatcher permission set.
Mobile workers (technicians)	Mobile workers receive work orders and service appointments from dispatchers or agents and conduct customer site visits. They also update job progress from mobile devices with the Salesforce mobile app or the Field Service mobile app.
Self-service	Self-service users are your customers. You can grant access so that self-service users can schedule and manage their own service appointments via Experience Builder sites.
Custom personas	Sometimes users don't fit neatly into the predefined categories. For example, your company works with contractors that do the same work as employee mobile workers. In that case, we recommend mapping users to the persona that most closely matches their job

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access field service objects:

- Field Service Standard

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

User persona	Description
	function. Clone the managed package's permission sets, then add your custom permissions to assign access.

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

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.

Permission Set	Description	Who Needs It
Field Service Dispatcher	Provides access to the dispatcher console.	Dispatchers
Field Service Dispatcher Plus Login-Based	Provides login-based users with the Contractor Plus license access to the dispatcher console.	Contractor dispatchers
Field Service Scheduling	Allows the user to be shown on the dispatcher console Gantt and included in scheduling and optimization.	Mobile workers (field technicians)
Field Service Scheduling Login-Based	Provides login-based users with the Contractor license access to Field Service Scheduling features.	Contractor mobile workers (field technicians)
Field Service Scheduling Plus Login-Based	Provides login-based users with the Contractor Plus license access to Field Service Scheduling features.	Contractor mobile workers (field technicians)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access field service objects:

- Field Service Standard

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

Permission Set	Description	Who Needs It
Field Service Mobile	Provides access to the Field Service mobile app.	Mobile users (field technicians)
Field Service Mobile Login-Based	Provides login-based users with the Contractor license access to Field Service Mobile features.	Contractor mobile users and contractor admin
Field Service Mobile Plus Login-Based	Provides login-based users with the Contractor Plus license access to Field Service Mobile features.	Contractor mobile users
Field Service Self-Service	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.	Customers
Field Service Guest User	Gives unauthenticated users limited access to view and create records.	Guest users

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

SEE ALSO:

[Limit Access to Field Service Records](#)

[Set Up Inventory Access for Mobile Workers](#)

[Give Users Access to the Field Service Mobile App](#)

[Limit Access to Field Service Records](#)

[Work in the Field Service Dispatcher Console](#)

Create Field Service Permission Sets

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

 This is a Field Service managed package feature.

Watch the video to see how to create and assign permission set licenses to give your team access to Field Service features.

 [Watch a video](#)

Watch the video to see how to get Field Service provisioned for users.

 [Watch a video](#)

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.

User Role	Permission Sets Created	Purpose
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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

User Role	Permission Sets Created	Purpose
Field Service Dispatcher	Field Service Dispatcher License AND FSL Dispatcher Permissions	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.
Field Service Community Dispatcher	Field Service Community Dispatcher License AND FSL Community Dispatcher Permissions	Users can view and use the dispatcher console, view global actions and their related objects, and schedule, optimize, and dispatch service appointments.
Field Service Self Service	Field Service Self Service License AND FSL Self Service Permissions	Experience Builder site users can view all global actions and their related objects to create, book, and schedule their appointments.
Field Service Integration	Field Service Integration	Users can access data needed for optimization, automatic scheduling, and service appointment bundling.
Field Service Bundle for Dispatcher	Field Service Bundle for Dispatcher License AND FSL Bundle for Dispatcher Permissions	Users can schedule and manage bundled service appointments.
Field Service Guest User	Field Service Guest User License	Field Service Guest User License provides the permissions for unauthenticated users to run appointment booking and scheduling actions.

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.

SEE ALSO:

[How Are Field Service Permission Sets Updated?](#)

[Enable Enhanced Scheduling and Optimization](#)

[Transition to Enhanced Scheduling and Optimization](#)

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**.

Tasks	Permission Sets
Admin: Manage all Field Service objects, including the Field Service Admin app, Field Service Visualforce pages, and logic services.	<ul style="list-style-type: none"> • FSL Admin Permissions • Field Service Admin License* <p>*The Field Service Admin License permission set isn't created in newer Salesforce orgs, so it doesn't need to be assigned to users.</p>
Agent: Access all global actions and their related objects to create, book, and schedule service appointments.	<ul style="list-style-type: none"> • FSL Agent Permissions • Field Service Agent License* <p>*The Field Service Agent License permission set isn't created in newer Salesforce orgs, so it doesn't need to be assigned to users.</p>
Dispatcher: Access all global actions and their related objects to create, book, and schedule service appointments.	<ul style="list-style-type: none"> • Field Service Dispatcher License • FSL Dispatcher Permissions
Technician: Manage service appointments and their related parent objects.	<ul style="list-style-type: none"> • 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 .

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

Search service resources...						Licenses in use: 15/30 7/30	
<input type="checkbox"/> RESOURCE NAME ↑	USER	GANTT LABEL	SERVICE TERRITORY	ACTIVE	LICENSES		
<input type="checkbox"/> Alan Reed	Alan Reed	Installer	Los Angeles	<input checked="" type="checkbox"/>			
<input type="checkbox"/> Contractor1	Tsach Damin 777		Los Angeles	<input checked="" type="checkbox"/>			
<input type="checkbox"/> Gloria Barnes	Gloria Barnes	Showroom Staff	SF Showroom	<input checked="" type="checkbox"/>			

Search users...			Dispatchers: 3\30	
<input type="checkbox"/> Add	USER ↓	TERRITORIES	LICENSE	
	Lamar Smith	San Francisco		
	Lindsay Kara			

You can always make further changes in Setup.

This is a Field Service managed package feature.

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.

SEE ALSO:

[Enable Enhanced Scheduling and Optimization](#)

[Transition to Enhanced Scheduling and Optimization](#)

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)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience


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

- Candidates Chatter action (GetCandidates)
- Emergency Chatter action (EmergencyWizard)

During this update process, any minimum permissions that were removed from the permission set are readded. Permissions added by an admin aren't removed.

Permission sets auto-update is only triggered one time after every managed package upgrade.

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.

SEE ALSO:

[Create Field Service Permission Sets](#)

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 custom permission sets apply only to the Field Service dispatcher console actions and views.

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience


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

Custom Permission	Description
Abort Optimization Request	Abort an optimization request from the Gantt.
Bulk Bundle	Bundle selected appointments from the appointment list.
Bulk Dispatch	Dispatch selected appointments from the appointment list.
Bulk Optimize	Submit an optimization request from the appointment list.

Custom Permission	Description
Bulk Schedule	Schedule selected appointments from the appointment list or from polygons.
Bulk Unbundle	Unbundle selected appointments from the appointment list.
Bulk Unschedule	Unschedule selected appointments from the appointment list or from polygons.
Create Absences from Gantt	Create resource absences on the Gantt.
Create Custom Gantt Filters	Create custom filters for appointments on the Gantt.
Fill-in	Fill in schedule gaps from the resource action menu.
Fix Overlaps	Resolve overlapping appointments from the resource action menu.
Enable Check Rules - All Services	Initiate a rule validation check on demand. This checks rules for all services loaded on the Gantt when the rule validation frequency isn't Always .
Enable Gantt Locker	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. 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.
Gantt - Enable Adjusting Duration	Edit the start and end time of a service appointment or resource absence on the Gantt.
Gantt - Enable Gantt Policy Picker	Select a nondefault policy for scheduling and calculating rule violations. This permission is an extended custom permission.
Gantt and List - Bundle and Unbundle	Bundle and unbundle service appointments from the Gantt or from the appointment list.
Gantt and List - Enable Bulk Check Rule	Check rules for multiple service appointments from the Gantt or from the appointment list.
Gantt and List - Enable Check Rules	Check rules for a single service appointment from the Gantt or from the appointment list.
Gantt and List - Show Get Candidates	Find resources for an appointment from the appointment list or from the Gantt. This permission is an extended custom permission.
Gantt and Map - Enable Drag and Drop	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.
Gantt Palettes Edit	Create, edit, and delete Gantt palettes.
Gantt Palettes View	View the Palettes tab in the Gantt, and apply the selected palette.
Gantt - Show Change Status Action	Change the status from the Gantt. Without this permission, users can't dispatch from the map. This permission is an extended custom permission.
Gantt - Show Pin Service	Pin or unpin appointments from the Gantt. This permission is an extended custom permission.
Gantt - Show Unschedule	Unschedule appointments from the Gantt. This permission is an extended custom permission.
Group Nearby	Adjust the schedule on the Gantt to find other appointments on that day that are close to the selected appointment.

Custom Permission	Description
Hide map on Emergency Wizard	Hide the map view in the Emergency Wizard to show only candidates.
Hide Live Positions from Dispatcher Console Map	Hide the Live Positions marker from the dispatcher console map.
Hide Actual Routes from Resource Map	Hide the Actual Route from the service resource's map.
Hide Live Positions from Resource Map	Hide the Live Positions marker from the service resource's map.
Hide Resource's Last Seen Time from Gantt	Hide the service resource's Last-Seen indicator from the Gantt.
Longterm View	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.
Map Polygons - Show In Jeopardy	Show the In Jeopardy flag from a map polygon. This permission is an extended custom permission.
MDT View	Show the multi-day view in the dispatcher console. The Long-Term Gantt view replaces the multi-day view.
Monthly Utilization	Show utilization in the Gantt resolution menu in the top-right corner.
Policy Picker in Appointment Booking	Change the scheduling policy in the Book Appointment action.
Policy Picker in Get Candidates	Change the scheduling policy in the Get Candidates action.
Polygons - create\update	Create and update map polygons.
Polygons - view	View map polygons.
Publish custom Gantt filters	Share custom filters for appointments on the Gantt.
Reshuffle	Reshuffle appointments from the appointment action menu or when you right-click services on the Gantt.
Resource Schedule Optimization	Optimize a resource's schedule from the resource action menu.
Schedule	Schedule an appointment from the appointment list or from the map.
Service List View - Canceled	Show the Canceled appointment list.
Service List View - Contractors	Show the Contractors appointment list.
Service List View - Crews	Show the Crews appointment list.
Service List View - Exclude Bundle Members	Show service appointments that aren't bundle members in the appointment list.
Service List View - Flagged	Show the Flagged appointment list.
Service List View - Gantt	Show the Gantt appointment list.
Service List View - In Jeopardy	Show the In Jeopardy appointment list.

Custom Permission	Description
Service List View - Rule Violating	Show the Rule Violating appointment list.
Service List View - Scheduled	Show the Scheduled appointment list.
Service List View - Selected	Show the Selected appointment list.
Service List View - Todo	Show the Todo appointment list.
Service List View - Unscheduled	Show the Unscheduled appointment list.
Streaming API	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 > Dispatcher Console UI > Timed Updates .
Utilization on Service Territory	For the selected Gantt horizon, view utilization percentages for each territory's workforce.
View resource on secondary STM	Show a resource's secondary territory membership on the Gantt.

 **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. Select 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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.

[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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

SEE ALSO:

[Set Up Your Field Service Workforce](#)

Create Service Territories for Field Service

USER PERMISSIONS

To create service territories:	Create on service territories
To view service territories and the Service Territories tab:	Read on service territories
To edit service territories:	Edit on service territories
To delete service territories:	Delete on service territories
To view service territory locations:	Read on service territories
To create, update, or delete service territory locations:	Edit on service territories
To view service territory members:	Read on service territories
To create, update, or delete service territory members:	Edit on service territories

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.
 - a. 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.

[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.

SEE ALSO:

[Service Territory Fields for Field Service](#)


[Service Territory Fields for Field Service](#)

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.

If your primary and secondary service territories have the same operating hours, you don't need to apply the operating hours to both territories. It's sufficient to set only the primary service territory operating hours and leave the secondary service territory Operating Hours field empty.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


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. Scheduling and optimization is supported only for service territories with at least one primary service territory member.

- 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.
- Secondary territory memberships must be identical to, or contained within, the primary territory membership for a particular time and resource. If the secondary territory memberships aren't fully covered by a primary territory membership, availability applies only to the overlapping period.

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.

SEE ALSO:

[Service Territory Fields for Field Service](#)

[Service Territory Fields for Field Service](#)

[Field Service Guidelines for Shift Availability](#)

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
To assign holidays to operating hours:	Edit on operating hours

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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.

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



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

Creating 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. Also, operating hours aren't available in the Organization-Wide Default Sharing Settings.

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 work 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.

Assigning 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. From the App Launcher, find and select the Field Service Admin app. Go to **Field Service Settings > Scheduling > 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.

Enforcing 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 is 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. When you're using Enhanced Scheduling and Optimization, use the time zone of the operating hours record. When you're not using Enhanced Scheduling and Optimization, use the time zone of the service territory.

 **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.

Setting Up Operating Hours for Contractors

For contractors who work regularly and are using our per-user-per-month Contractor or Contractor Plus Licenses, scheduling works the same as for any other regular user. For contractors who work less frequently, it can be more cost-effective to use our Contractor or Contractor Plus login-based licenses. Set up operating hours by assigning shifts instead of using standard operating hours, so it doesn't look like your contractors are always available for work.

To use shifts to set availability, first assign operating hours to the service resource's membership record directly, so that the system doesn't default to assigning them the operating hours for their service territory. Then, assign them shifts on the days they work, whether that's recurring or only a few times per year.

Adding Holidays to Operating Hours

Modify operating hours by adding holidays, which represent closures or important dates. Holidays appear as unavailable time in the dispatcher console, and an icon near the date displays holiday details. The shift schedule view also shows holidays as unavailable time. But you can add availability with a shift marked as a holiday shift. Holiday shifts let you assign mobile workers to holiday dates that would otherwise be blocked off.

You can assign holidays to individual service resources by creating operating hours assigned to the specific service resource. Individualized operating hours let you adjust a worker's availability based on birthdays, religious holidays, or personal schedules.

To apply holiday logic during schedule optimization, make sure Enhanced Scheduling and Optimization is enabled in Field Service Settings. Otherwise, holidays are marked on the calendar but don't impact scheduling.

When you're using Enhanced Scheduling and Optimization, you can add holidays that represent the time when customers aren't available to receive services. These holidays take precedence over the customers' preferences for operating hours.

For recurring holidays, only the first upcoming holiday is shown on the Gantt and accounted for in scheduling and optimization. Subsequent holidays show on the Gantt after the first holiday passes.

[Add Holidays to Operating Hours](#)

Holidays help you manage the schedule when your business is closed. Create holidays, then add the holidays to your operating hours. Scheduling and optimization processes can take your holidays into account so that work isn't scheduled.

SEE ALSO:

- [Operating Hours Fields for Field Service](#)
- [Time Zones and Appointment Booking](#)
- [Work Rule Type: Service Appointment Visiting Hours](#)
- [Guidelines for Setting Up Field Service Contractors](#)
- [Operating Hours Fields for Field Service](#)
- [Guidelines for Setting Up Field Service Contractors](#)
- [Work Rule Type: Service Appointment Visiting Hours](#)
- [Field Service Guidelines for Shift Availability](#)

Add Holidays to Operating Hours

Holidays help you manage the schedule when your business is closed. Create holidays, then add the holidays to your operating hours. Scheduling and optimization processes can take your holidays into account so that work isn't scheduled.

Watch the video to see how to add holidays to operating hours to reflect when your business is open.

 [Watch a video](#)

Before you start:

- To use holiday operating hours, ensure that the Operating Hours Holidays related list is on the operating hours page layout.
- To account for holidays during schedule optimization, Enhanced Scheduling and Optimization must be enabled in Field Service Settings. Otherwise, holidays are marked on the calendar but don't impact scheduling. Make sure Enhanced Scheduling and Optimization is enabled for each service territory.
- For scheduling recurring holidays, only the first upcoming holiday is shown on the Gantt and accounted for in scheduling and optimization. Subsequent holidays show on the Gantt after the first holiday passes.

1. [Create holidays in Setup](#).
2. From an operating hours record, go to the Operating Hours Holidays related list and click **New**.
3. Search for and select a holiday, then save your changes.

 **Note:** It can take a few minutes for newly created holidays to appear in the search results.

4. Repeat these steps for each holiday.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

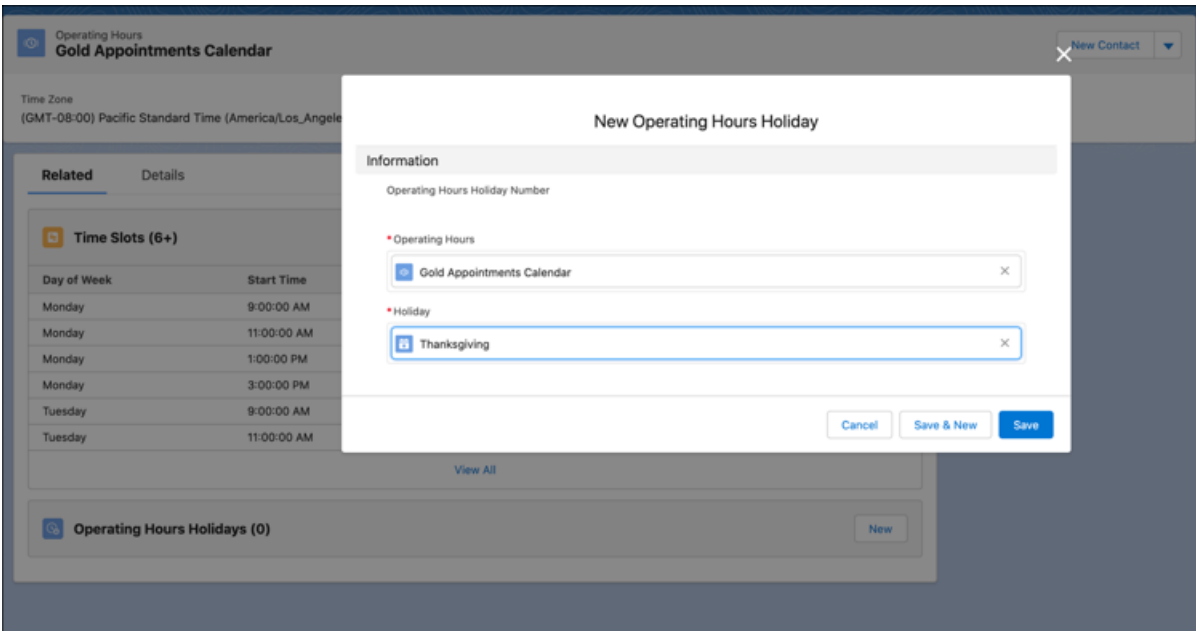
USER PERMISSIONS

To add holidays to operating hours:

- Edit on operating hours

To create holidays:

- Manage Business Hours Holidays



SEE ALSO:

[Set Up Support Holidays](#)

[Enable Enhanced Scheduling and Optimization](#)

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.

[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](#)

In Field Service, 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.

[Prepare Your Org for Shift Scheduling](#)

Add rules, objectives, and constraints that help shift managers assign the right worker to shifts. You can account for a service resource's preferred hours with scheduling preferences. After you define your business objectives, the Get Candidates and Mass Shift Update actions take your scheduling logic into account.

[Build Repeating Shift Patterns](#)

Save time creating shifts by defining commonly used patterns of shifts in Field Service. Create templates that define the start time and job profile. Then build a pattern that lists the shift templates to use each day.

EDITIONS

Available in: Lightning Experience

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

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.

EDITIONS

Available in: Lightning Experience

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

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.
- On 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

In Field Service, 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**.

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, create, and update shifts and job profiles

- View, create, and edit on Shifts, Job Profiles, Service Territories, Service Resources, Service Territory Memberships

Prepare Your Org for Shift Scheduling

Add rules, objectives, and constraints that help shift managers assign the right worker to shifts. You can account for a service resource's preferred hours with scheduling preferences. After you define your business objectives, the Get Candidates and Mass Shift Update actions take your scheduling logic into account.

[Create a Scheduling Objective for Shifts](#)

Planners and administrators can optimize the shift scheduling process by adding Scheduling Objectives, which apply various business goals to the scheduling process.

[Create a Scheduling Rule for Shifts](#)

Create rules that define the scheduling logic when shifts are assigned to workers. Turn on the default rules, or create your own scheduling rules.

[Scheduling Rule Types](#)

Scheduling rules help match service resources to shifts. When the scheduling logic looks for service resources to assign to shifts, it checks your rules.

[Add Shift Scheduling Constraints](#)

Scheduling constraints set boundaries for when work happens and how much work is done. Set scheduling constraints on either service resources or service territories. To match service resources to shifts, the work limit-type scheduling rule looks first for a constraint on the service resource. If there isn't one, then the rule looks for a scheduling constraint on the service territory.

SEE ALSO:

[Assign and Update Field Service Shifts](#)

[Find Shift Candidates](#)

Create a Scheduling Objective for Shifts

Planners and administrators can optimize the shift scheduling process by adding Scheduling Objectives, which apply various business goals to the scheduling process.

Create scheduling objectives that reflect your scheduling goals. When a planner schedules service resources, the scheduling engine gives each objective equal weight. For each objective, potential service resources are assigned a score to reflect how well the objective is met. The service resource with the highest score is prioritized for shift scheduling.

1. Access the Scheduling Objectives page.
 - a. From Setup, in the Quick Find box, enter *objectives*, and then select **Scheduling Objectives**.

From the Scheduling Objectives page, you can:

- Select, customize, or create your own view of the data.
- Create, edit, and delete scheduling objectives.

2. Create a Scheduling Objective.
 - a. From the Scheduling Objective page, click **New**.
 - b. Enter a name and description.
 - c. Select the **Scheduling Objective Type**.

We predefine these objective types.

- Agent Preference—When service resources [define their preferred operating hours and create a service resource preference](#), the scheduling tools consider each resource's preference when identifying candidates for shifts.
- Balance Shifts—Scheduling balances the number of shifts across agents within the specified time period.
- Balance Non-Standard Shifts—Scheduling balances the number of non-standard shifts across agents within the specified time period.

- d. Save your work.

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 set scheduling objectives:

- Field Service Standard AND Customize Application

3. To edit a scheduling objective, open the dropdown action menu and select **Edit**.
4. To delete a scheduling objective, open the dropdown action menu and select **Delete**.

SEE ALSO:

[Assign and Update Field Service Shifts](#)

Create a Scheduling Rule for Shifts

Create rules that define the scheduling logic when shifts are assigned to workers. Turn on the default rules, or create your own scheduling rules.

To create a scheduling rule:

1. From Setup, in the Quick Find box, enter *rules*, and then select **Rules**.
2. To create a new listview:
 - a. Click the gear icon, and select **New**.
 - b. Name your listview, and select who can view it.
 - c. Save your changes.
3. To create a scheduling rule, click **New**.
4. Name your scheduling rule and select a **Scheduling Rule Type**.

 **Note:** The Match Queue rule type is available only with Workforce Engagement.

5. Fill out the fields on the form and save your work.

Shift scheduling tools, including get candidates, batch assignment, and mass shift update, then check your rules when matching agents to shifts.

There are five default rules that you can use as examples. The default rules are turned off until you enable them.

- Availability—only assign a service resource with availability.
- Match territory—only assign shifts in the service resource’s service territory.
- Match skill—only assign shifts if the service resource’s skills match the job profile skills.
- Enforce work limits—limit the number of work hours per day, week, or month, or limit the number of shifts per day, week, or month. Define work limits in the Scheduling Constraint tab.
- Limit nonstandard shifts—Use the Non-Standard checkbox on shifts and shift templates to flag undesirable shifts to limit how many non-standard shifts are assigned to each resource per month. For example, if the limit is two then a resource assigned to two non-standard shifts won’t be assigned to a third.

SEE ALSO:

[Assign and Update Field Service Shifts](#)

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 create scheduling rules:

- Field Service Standard AND Customize Application

Scheduling Rule Types

Scheduling rules help match service resources to shifts. When the scheduling logic looks for service resources to assign to shifts, it checks your rules.

Scheduling Rule Type	Description
Availability	Checks if the service resource is available to be assigned to a shift. The Availability rule checks for the following conditions: <ul style="list-style-type: none"> The shift doesn't overlap with an existing shift. No resource absence is scheduled. The operating hours on the primary territory align with the shift duration.
Limit Non-Standard Shifts	Checks if the service resource has reached the monthly limit for non-standard shifts. Specify the limit in a scheduling constraint on each service resource or service territory.
Match Skills	Checks if the service resource has the appropriate skills to be assigned to the shift. Skill levels aren't considered.
Match Queues	Checks if the service resource is a member of the appropriate queue to be assigned to the shift. The Match Queue rule type is only available if Workforce Engagement is enabled.
Match Territory	Required: Checks if the service resource belongs to the shift's territory.
Work Limit	Checks if the service resource can handle the work unit maximum. You decide if the work unit max is measured in hours or shifts; choose a specific scheduling constraint to define the type of work required; and decide if the max is per day, week, or month. You can create custom scheduling constraints.

EDITIONS

Available in: Lightning Experience

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

Add Shift Scheduling Constraints

Scheduling constraints set boundaries for when work happens and how much work is done. Set scheduling constraints on either service resources or service territories. To match service resources to shifts, the work limit-type scheduling rule looks first for a constraint on the service resource. If there isn't one, then the rule looks for a scheduling constraint on the service territory.

Define a scheduling constraint for each service resource, either on the service resource record or on the service territory. If you don't know what limits to set, it's OK to set up constraints with empty values.

 **Note:** You can create up to 50 scheduling constraints.

1. Open **Scheduling Constraints** in the App Launcher.
2. Click **New**.
3. Name your scheduling constraint, then fill out the related details.
4. Save your changes.
5. Open Service Resources or Service Territories from the App Launcher.
6. Open the Service Resource or Service Territory where you want to add a constraint.
7. In the Scheduling Constraints field, add your constraint, and save your changes.

Build Repeating Shift Patterns

Save time creating shifts by defining commonly used patterns of shifts in Field Service. Create templates that define the start time and job profile. Then build a pattern that lists the shift templates to use each day.

Your team can use the New from Pattern action to quickly create shifts from templates. First, you build the templates and shift patterns.

Example: Example 1: Daily Delivery Shifts

Build a daily pattern of shift templates for your delivery workers. For example, a restaurant has a morning, afternoon, and evening delivery shift.

First, add shift templates with the following details:

Template Name	Job Profile	Start Time	Duration
Delivery, Morning	Food delivery	6:00 AM	8
Delivery, Afternoon	Food delivery	12:00 PM	8
Delivery, Evening	Food delivery	4:00 PM	8

Next, create a shift pattern.

Field	Value
Shift Template Name	Daily delivery shifts
Pattern Length	1

EDITIONS

Available in: Lightning Experience


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

EDITIONS

Available in: Lightning Experience

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

For the shift pattern entries, add the morning, afternoon, and evening delivery shift templates. Because the pattern is for a single day, the Day Position is one for each of the templates. When the shifts are created, you can optionally assign a service territory and service resource to the shifts. You can't assign multiple territories or resources, so we recommend keeping the patterns fairly simple.

 **Example: Example 2: Weekly Regular Hours**

Build a five- or seven-day pattern of shift templates for your regular hours. A hotel staffs a front desk clerk each day from 8:00 AM to 4:00 PM and from 4:00 PM to 12:00 AM. On Thursday, Friday, and Saturday there's an extra shift from 12:00 PM to 8:00 PM.

First, add shift templates with the following details:

Template Name	Job Profile	Start Time	Duration
Desk, Morning	Front desk	8:00 AM	8
Desk, Evening	Front desk	4:00 PM	8
Desk, Weekend Surge	Front desk	12:00 PM	8

Next, create a shift pattern.

Field	Value
Shift Template Name	Front desk shifts, Weekly (Monday)
Pattern Length	7

For the shift pattern entries, add the morning, afternoon, and weekend shift templates.

- Add the morning shift seven times, iterating through the day positions 1 through 7.
- Add the evening shift seven times, iterating through the day positions 1 through 7.
- Because the pattern starts on Monday, add the weekend surge shifts for Day Position four, five, and 6.

You now have a shift pattern that creates 17 shifts per week.

[Create Shift Templates](#)

Use shift templates to help manage your team's schedule. Store the details of commonly used shifts such as the duration, start time, and job profile.

[Create Shift Patterns](#)

Create shift patterns that store commonly used sets of shifts. Your team can use the New from Pattern action to quickly create shifts from templates.

SEE ALSO:

[Create Flexible Work Shifts](#)

[Create Shifts from a Pattern](#)

Create Shift Templates

Use shift templates to help manage your team's schedule. Store the details of commonly used shifts such as the duration, start time, and job profile.

1. From the App Launcher, click **Shift Templates**.
2. Click **New**.
3. Enter a name and description for the template.
4. Enter the start time and duration.
5. Optionally, select a job profile.
6. **Save** the template.

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, create, and update shift templates

- View, create, and edit on Shift Templates, AND View on Job Profiles, Service Territories

Create Shift Patterns

Create shift patterns that store commonly used sets of shifts. Your team can use the New from Pattern action to quickly create shifts from templates.

- From the App Launcher , select **Shift Patterns**.
- Click **New**.
- Enter a name and description for the pattern.
We recommend that you include key details in the shift pattern name. For example, you can include in the intended start day of a multi-day pattern such as *Weekly Regular Hours (Monday)*.
- Click **Save**.
- Switch to the **Related** tab.
- Find the Shift Pattern Entries related list and add the appropriate shift templates.
- To add a template, click **New** and then fill out the form fields.

To create multiple shifts per day with the same details, you can add the same template multiple times. You can also add the same template to different days of the week by changing the day position.

EDITIONS

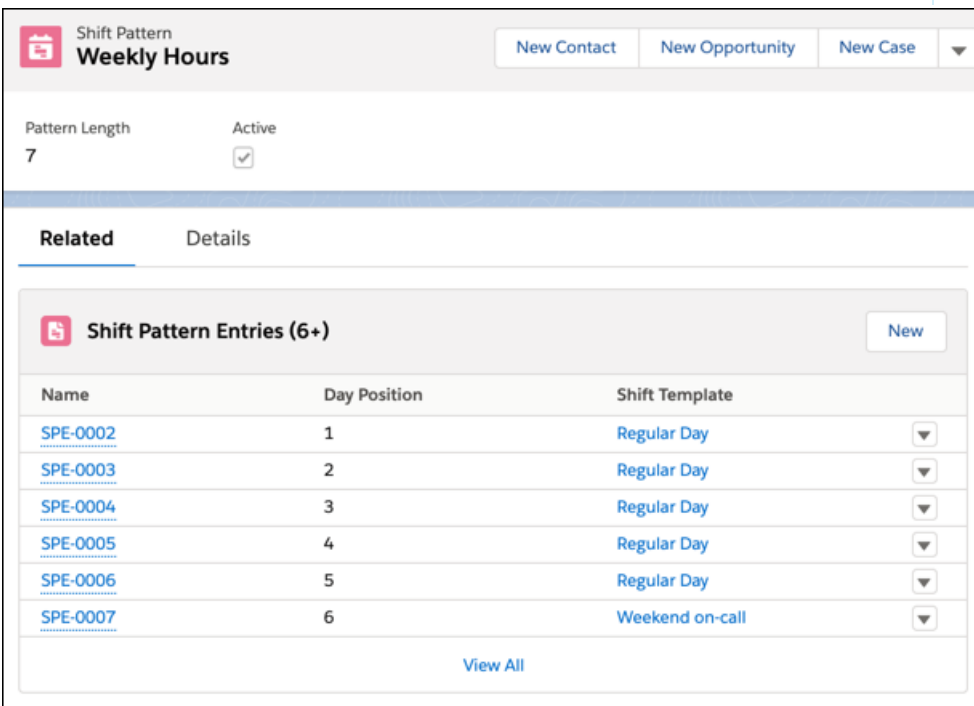
Available in: Lightning Experience

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

USER PERMISSIONS

To view, create, and update shift patterns

- View, create, and edit on Shifts, Shift Patterns, Shift Pattern Entries



Shift Pattern
Weekly Hours

Pattern Length: 7 Active:

Related Details

Shift Pattern Entries (6+) [New](#)

Name	Day Position	Shift Template
SPE-0002	1	Regular Day
SPE-0003	2	Regular Day
SPE-0004	3	Regular Day
SPE-0005	4	Regular Day
SPE-0006	5	Regular Day
SPE-0007	6	Weekend on-call

[View All](#)

- Make sure that the shift templates and the shift pattern are active.

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.

[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 Field Service 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.

[Setup for Maintenance Work Rules](#)

For Salesforce orgs created before the Spring '21 (230) release, setup is required to take full advantage of Field Service maintenance work rules.

SEE ALSO:

[Work Order Fields for Field Service](#)

[Work Order Line Item Fields for Field Service](#)

[Manage Field Service Work Orders](#)

[Manage Field Service Work Orders](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

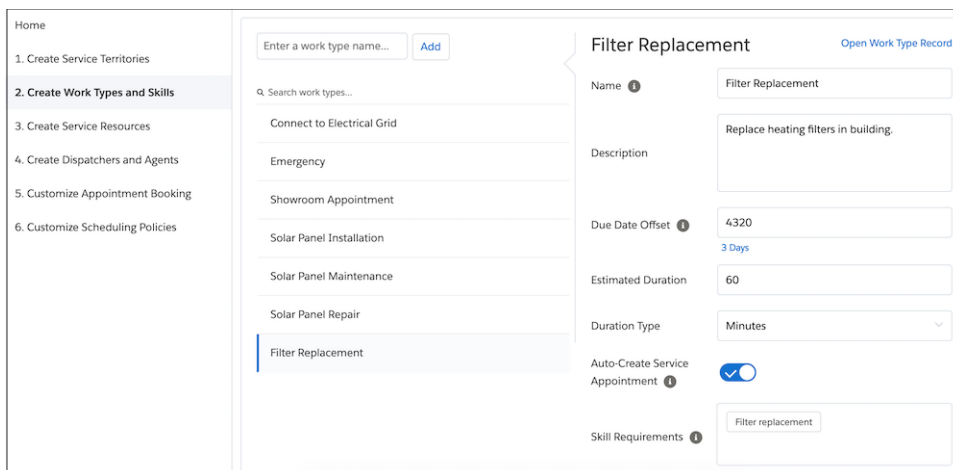
Before you start, make a list of the work types you want to create. For example, a heater installation company can create work types names Install Heater, Repair Heater, and Replace Heater. List the skills and parts required to complete each task, and any knowledge articles that should be attached to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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 work types:

- Create on work types

To apply work types to work orders or work order line items:

- Edit on work orders

[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.

[Create 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.

SEE ALSO:

[Create Skills for Field Service](#)

[Work Type Fields for Field Service](#)

[Add Required Skills to Work Orders or Work Types for Field Service](#)

[Attach Knowledge Articles to Work Orders or Work Types](#)

[Track Required Inventory in Field Service](#)

[Trailhead: Field Service Center Customization](#)

[Work Type Fields for Field Service](#)

[Set Up Designated Work for Time Slots When Not Using Enhanced Scheduling and Optimization](#)

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


 **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.
- 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.

SEE ALSO:

- [Create Skills for Field Service](#)
- [Track Required Inventory in Field Service](#)
- [Work Type Fields for Field Service](#)
- [Set Up Knowledge for Work Orders](#)
- [Add Required Skills to Work Orders or Work Types for Field Service](#)
- [Work Type Fields for Field Service](#)

Create Skills for Field Service

USER PERMISSIONS

Create and update skills in Setup:	Customize Application
Assign skills to service resources:	Edit on service resources
View service resources' skills:	Read on service resources
Add required skills to work orders or work order line items:	Edit on work orders
Add required skills to work types:	Edit on work types

EDITIONS


Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

SEE ALSO:

[Skill Fields for Field Service](#)

[Add Required Skills to Work Orders or Work Types for Field Service](#)

[Create Work Types for Field Service](#)

[Guidelines for Creating Work Types for Field Service](#)

[Create Service Resources for Field Service](#)

[Add Required Skills to Work Orders or Work Types for Field Service](#)

[Skill Fields for Field Service](#)

[Work Rule Type: Match Skills](#)

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.

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

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



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

Page Layout	Recommended Customizations
Work Order	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • Confirm that your page layout has the desired related lists: <ul style="list-style-type: none"> – Child Work Orders: The work order's child work orders – Object Milestones: Milestones on the work order (available only if entitlement management is set up) – Products Consumed: Products used during the completion of the work order – Product Requests: Products requested for the work order – Product Request Line Items: Line items on product requests

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 set field history tracking:

- Customize Application

To create and edit users:

- Manage Internal Users

Page Layout	Recommended Customizations
	<ul style="list-style-type: none"> - Products Required: Products needed to complete the work order - Resource Preferences: Preferred, required, or excluded service resources on the work order - Service Appointments: Appointments indicating when the work is scheduled - Service Reports: Reports summarizing the work for customers - Skill Requirements: Skills needed to complete the work order - Time Sheet Entries: Schedule of mobile workers' time spent on the work order - Work Order Line Items: Sub tasks or steps on the work order <ul style="list-style-type: none"> • Optionally, add your own custom values to the Status picklist field. The Status field comes with these default values: <ul style="list-style-type: none"> - New - In Progress - On Hold - Completed - Cannot Complete - Closed - Canceled <p>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.</p> <p>To learn which processes reference Status Category, see How are Status Categories Used?</p>
Work Order Line Item	<ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> - 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 - 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	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • Confirm that your page layout has the desired related lists:

Page Layout	Recommended Customizations
	<ul style="list-style-type: none"> <li data-bbox="500 254 1429 321">– Products Required: The products needed to complete the work. Work orders and work order line items inherit their work type’s required products. <li data-bbox="500 331 1429 399">– 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

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.

SEE ALSO:

[Create Field Service Work Orders](#)

[View Knowledge Articles in the Field Service Mobile App](#)

[Work Order Fields for Field Service](#)

[Work Order Line Item Fields for Field Service](#)

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Status Picklist Values				
Action	Values	API Name	Status Category	Default
Edit Deactivate	New	New	New	<input checked="" type="checkbox"/>
Edit Del Deactivate	In Progress	In Progress	In Progress	<input type="checkbox"/>
Edit Del Deactivate	On Hold	On Hold	On Hold	<input type="checkbox"/>
Edit Del Deactivate	Completed	Completed	Completed	<input type="checkbox"/>
Edit Del Deactivate	Closed	Closed	Closed	<input type="checkbox"/>
Edit Del Deactivate	Cannot Complete	Cannot Complete	Cannot Complete	<input type="checkbox"/>
Edit Del Deactivate	Canceled	Canceled	Canceled	<input type="checkbox"/>

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
- Usage-based and criteria-based preventive maintenance. If work orders are created from maintenance work rules that are incomplete, then no new work orders are created until the active work order is completed. A work order is considered complete when its status is Cannot Complete, Canceled, Completed, or Closed.
- Dispatcher console [appointment list filters](#)
- Dispatch scheduled jobs, which are triggered by an appointment's status category being updated 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

SEE ALSO:

[Working in the Field Service Dispatcher Console Appointment List](#)

Set Up Knowledge for Work Orders

Attach knowledge articles to Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To attach or detach an article on a work order or work order line item:

- Read on work orders AND Read on the article type AND Knowledge enabled

To attach or detach an article on a work type:

- Read on work types AND Read on the article type AND Knowledge enabled

To edit page layouts:

- Customize Application

To edit console layouts:

- Customize Application AND Service Cloud User

- [Linked articles are read-only in the Salesforce mobile app.](#)

SEE ALSO:

[Attach Knowledge Articles to Work Orders or Work Types](#)

[View Knowledge Articles in the Field Service Mobile App](#)

[Linked Article Fields](#)

[Guidelines for Creating Work Types for Field Service](#)

[Linked Article Fields](#)

[Attach Knowledge Articles to Work Orders or Work Types](#)

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

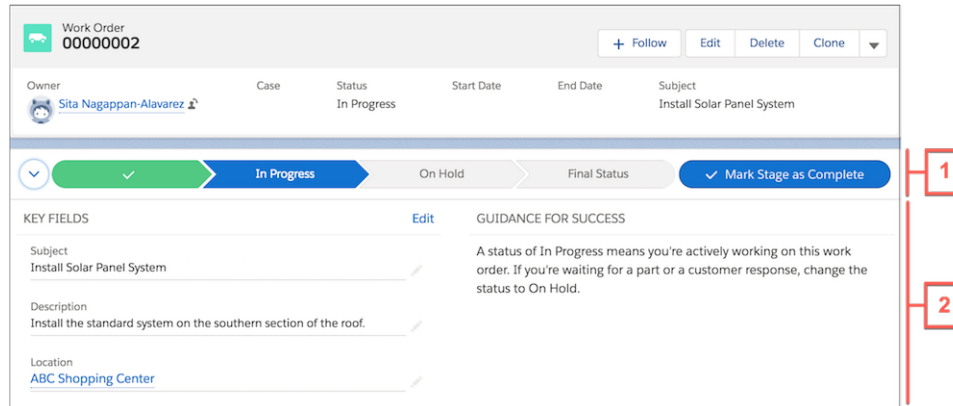
USER PERMISSIONS

To set up a path:

- [Modify All Data](#)

To create, customize, or publish an Experience Cloud site:

- [Create and Set Up Experiences AND View Setup and Configuration](#)



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.

Action	Values	API Name	Status Category	Default
Edit Deactivate	New	New	New	<input checked="" type="checkbox"/>
Edit Del Deactivate	In Progress	In Progress	In Progress	<input type="checkbox"/>
Edit Del Deactivate	On Hold	On Hold	On Hold	<input type="checkbox"/>
Edit Del Deactivate	Completed	Completed	Completed	<input type="checkbox"/>
Edit Del Deactivate	Closed	Closed	Closed	<input type="checkbox"/>
Edit Del Deactivate	Cannot Complete	Cannot Complete	Cannot Complete	<input type="checkbox"/>
Edit Del Deactivate	Canceled	Canceled	Canceled	<input type="checkbox"/>

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.

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

SEE ALSO:

[Lightning Flow for Service and the Actions & Recommendations Component](#)

Setup for Maintenance Work Rules

For Salesforce orgs created before the Spring '21 (230) release, setup is required to take full advantage of Field Service maintenance work rules.

- In permission sets or profiles,
 - enable the Maintenance Work Rule tab.
 - enable Field Level Security on Maintenance Plan and Maintenance Asset fields on the Maintenance Work Rule for profiles.
- Add the Maintenance Work Rule related list to the maintenance plan and maintenance assets page layout.
- On the Maintenance Work Rule page layout, click **Maintenance Asset** properties in the **Maintenance Work Rule Detail** section and uncheck **Required** in the Field Properties for Maintenance Asset.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

[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 Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

[Sync Services and Resource Absences with Events Field Service Using Calendar Sync](#)

You can keep your services and resource absences in sync with calendar events using Calendar Sync. Syncing services and resource absences to or from calendar events lets you maintain an accurate view of your services and resource availability when you create events and request meetings from your Salesforce calendar. Events can then be synced between external calendars and Salesforce.

SEE ALSO:

[Set Up Service Territories, Operating Hours, and Shifts for Field Service](#)

[Manage Field Service Resources](#)

Create Service Resources for Field Service

USER PERMISSIONS


To create service resources:	Create on service resources
To deactivate service resources:	Edit on service resources
To view resource capacities:	Read on service resources
To create, update, or delete resource capacities:	Edit on service resources
To view service resource skills:	Read on service resources
To create, update, or delete service resource skills:	Edit on service resources
To view, create, edit, or delete resource absences:	Read on service resources AND Edit on service resources
To delete resource absences:	Edit on service resources

EDITIONS


Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

[Define Capacity-Based Resources](#)

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.

SEE ALSO:

[Service Resource Fields for Field Service](#)

[Create Skills for Field Service](#)

[Service Resource Fields for Field Service](#)

[Manage Field Service Resources](#)

[Work Rule Type: Working Territories](#)

[Work Rule Type: Match Territory](#)

Define Capacity-Based Resources

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.

- To indicate that a service resource is capacity-based, select **Capacity-Based** on the resource record and save your change.
- In the Capacities related list, click **New**.
- Enter the capacity start and end dates—for example, enter the resource's contract dates. If the Time Period is set to Day, enter the same start and end dates.
- Specify how much the resource can work.
 - For Time Period, select the time period that the capacity is based on. For example, if the resource can work 8 hours a day, select **Day**.
With Enhanced Scheduling and Optimization, you must select **Day**. The Week and Month options aren't supported.
 - For Hours per Time Period, base the resource's capacity on the number of hours worked. For example, if the resource can work 8 hours a day, enter *8*.
 - For Work Items per Time Period, base the resource's capacity on the number of service appointments assigned to them. For example, if the resource can complete 5 appointments a day, enter *5*.
- Save your changes. You can create multiple capacities for a resource as long as the start and end dates don't overlap. On the Gantt, you can see the percentage of booked capacity. You can also click the banner to see more details.

Tip: To create a capacity for a date range, add the Capacity Calendar to the Service Resource layout. To create a capacity for only one criterion (Hours per Time Period or Work Items per Time Period), make sure to delete the default value of 0.

Pay attention to these considerations if you're using Enhanced Scheduling and Optimization.

- The Fix Overlaps feature isn't supported for capacity-based service resources.
- Schedule optimization supports 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](#).

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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, update, or delete resource capacities:

- Edit on service resources

- Capacity-based resources can't be relocated or assigned to a secondary service territory.
- If Hours per Time Period or Work Items per Time Period are set to 0, the result of the performed action considers it a capacity of 0. However, on the Gantt, this value is considered empty.
- If you deselect Capacity-Based Resource, make sure you also remove the resource's defined capacities. Otherwise, the capacity still shows on the Gantt.
- Capacity-Based Resources doesn't support complex work.
- Up to 5,000 objects (service appointments and service resources) are supported overall in any optimization or scheduling actions.
- Day is the only time period supported. The Week and Month options aren't supported.
- The capacity banner on the Gantt doesn't show the capacity percentage. Additionally, if you click the capacity banner to see more details, the details window isn't updated accordingly.
- Capacity-based resources can't use the Count work rule.
- You can't schedule appointments for capacity-based resources that aren't assigned to a shift. This behavior is the same for regular resources.
- If you manually change the status of a service appointment to None, or clear the Scheduled Start and Scheduled End fields, the capacity consumption isn't updated.

Pay attention to these considerations if you aren't using Enhanced Scheduling and Optimization.

- The Fix Overlaps feature isn't supported for capacity-based service resources.
- Schedule optimization supports 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.
- If Hours per Time Period or Work Items per Time Period are set to 0, the result of the performed action considers it a capacity of 0. However, on the Gantt, this value is considered empty.
- If you deselect Capacity-Based Resource, make sure you also remove the resource's defined capacities. Otherwise, the capacity still shows on the Gantt.
- You can't assign capacity-based resources to appointments that are part of an appointment dependency group. Dispatchers can manually drag service appointments to capacity-based resources, but Scheduling and Optimization doesn't schedule those appointments. You can manually schedule the appointments.
- You can't schedule appointments for capacity-based resources that aren't assigned to a shift. This behavior is the same for regular resources.
- If you manually change the status of a service appointment to None, or clear the Scheduled Start and Scheduled End fields, the capacity consumption isn't updated.

SEE ALSO:

[Guidelines for Setting Up Field Service Contractors](#)

[Guidelines for Setting Up Field Service Contractors](#)

[Set Up Field Service in Experience Cloud Sites](#)


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. Resource efficiency is rounded up when using Enhanced Scheduling and Optimization.

During schedule optimization, the following formula is used to estimate the time that a mobile worker needs to complete an appointment: $Duration / Efficiency = Actual\ time\ to\ perform\ an\ appointment$

 **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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- 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.

Reactivating a user doesn't reactivate the related service resource. If you reactivate a user, you must reassign the user permissions to activate that service resource.

-  **Note:** After a user account is deactivated, the user is no longer visible on the Gantt. Let's say a user just left your company. To enable the dispatcher to work on the user's service appointments and prevent the user from logging in to your organization, freeze the user account before deactivating the user. Keep in mind that even though the user account is frozen, the service appointment can be assigned to a service resource related to the 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.

SEE ALSO:

[Service Resource Fields for Field Service](#)

[Create Service Crews](#)

[Freeze or Unfreeze User Accounts](#)

[Service Resource Fields for Field Service](#)

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.

Choose licenses


For contractors who work regularly, our per-user-per-month Contractor and Contractor Plus licenses give them unlimited access to everything they need. If your company employs a large number of seasonal or temporary contractors, our Contractor and Contractor Plus Login-Based licenses are a cost-effective alternative. You can create up to 20 users for each login that you buy with the Contractor and Contractor Plus Login-Based licenses. This multiplier ensures that you have all your contractors set up in the system, even if they don't work frequently. If you know you need 100 logins, for example, our login-based licenses let you create 2,000 users. Our servers keep each login valid until midnight in most time zones, so workers can get multiple jobs done using a single login.

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.

If you purchase login-based licenses, each unit of the Contractor Login-Based SKU assigns 20 Customer Community Plus login-based licenses and each unit of the Contractor Plus Login-Based SKU assigns the 20 Partner Community login-based licenses.

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 Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

SEE ALSO:

[Guidelines for Creating Operating Hours for Field Service](#)

[Set Up Field Service in Experience Cloud Sites](#)

[Set Up Field Service in Experience Cloud Sites](#)

[Define Capacity-Based Resources](#)

[Guidelines for Creating Operating Hours for Field Service](#)

[Define Capacity-Based Resources](#)

Create Service Crews

USER PERMISSIONS

To create service crews:	Create on service crews
To create service crews using the crew management tool:	Create on service crews AND Create on service resources AND Edit on service territories
To create service resources representing crews:	Create on service resources
To assign service crews to service appointments:	Edit on service appointments
To view service crew members:	Read on service crews AND Read on service resources
To create, update, or delete service crew members:	Edit on service crews

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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




This is a Field Service managed package feature.

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.

[Considerations for Scheduling Service Crews](#)

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

SEE ALSO:

[Service Crew Fields](#)

[View Service Crews on the Gantt](#)

[Set Up Crew Management](#)

[Manage Field Service Crew Membership](#)

[View Service Crews on the Gantt](#)

[Guidelines for Creating Service Resources for Field Service](#)

[Service Crew Fields](#)

[Manage Field Service Crew Membership](#)

[Set Up Crew Management](#)

Considerations for Scheduling Service Crews

Field 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 when:

- The appointment is dispatched (if the last status category isn't None)
- The appointment's status is changed to In Progress (if the last status category isn't None)
- The appointment is assigned to a different resource
- Changing the appointment's Scheduled Start or Scheduled End

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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 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. For example, you can't add a crew to a crew.
- 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 could 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 can assign the work to mobile workers or to crews. When using Enhanced Scheduling and Optimization, a Minimum Crew Size of 1 requires a crew.

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 zero on the service appointment's parent record, only single service resources (Technician type) are considered as candidates. If the Minimum Crew Size is 1 or more on the service appointment's parent record, only Crew type service resources 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 if the Match Skills work rule is included in the scheduling policy.

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. When using Enhanced Scheduling and Optimization, only the skill set of the crew members is considered when skill grouping is enabled, and the skill set of the crew is ignored (when skill grouping is disabled, the Match Skills work rule considers the crew resource type skills only).

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.

SEE ALSO:

[Service Crew Fields](#)

[View Service Crews on the Gantt](#)

[Set Up Crew Management](#)

[Manage Field Service Crew Membership](#)

[View Service Crews on the Gantt](#)

[Manage Field Service Crew Membership](#)

Set Up Crew Management

Give Field Service 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: both Salesforce Classic (not available in all orgs) 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

The screenshot shows the Salesforce Field Service Crew Management interface. The top navigation bar includes 'Field Service', 'Home', 'Reports', 'Field Service', 'Accounts', 'Work Orders', 'Service Appointments', 'Service Resources', 'Crew Management', and 'More'. The main area displays a calendar for Wednesday, July 31, 2019, with a grid of time slots from 12:00 AM to 11:00 PM. Two crews are visible: 'SF Roof Repair Crew (Crew Size: 3)' in San Francisco and 'Erin's Dream Team (Crew Size: 3)' in Los Angeles. Each crew has a 'Crew Schedule' row and a list of team members with their assigned service appointments (SCM-0001 to SCM-0005).

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.CrewsWorkorderLineltemLightbox Visualforce page
 - FSL.CrewManagement Apex class

You're all set! For help using crew management, see [Manage Field Service Crew Membership](#).

SEE ALSO:


- [Create Service Crews](#)
- [Considerations for Scheduling Service Crews](#)
- [View Service Crews on the Gantt](#)
- [Service Crew Fields](#)
- [Manage Field Service Crew Membership](#)
- [Manage Field Service Crew Membership](#)
- [Create Service Crews](#)
- [View Service Crews on the Gantt](#)

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


USER PERMISSIONS

To limit access to field service records:

- Field Service Admin Permissions

- 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 using customized sharing logic, you must ensure that every dispatcher gets Read/Write access and not just Read-Only access to all of the service appointments in their territory, in order to be able to edit the Service Resources' schedule.
- 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.
- Dispatchers must have sharing settings for the primary service territory of a service resource in order to manage the resource's schedule.



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.

SEE ALSO:

[Field Service Permission Set Licenses](#)

[Field Service Permission Set Licenses](#)

Sync Services and Resource Absences with Events Field Service Using Calendar Sync

You can keep your services and resource absences in sync with calendar events using Calendar Sync. Syncing services and resource absences to or from calendar events lets you maintain an accurate view of your services and resource availability when you create events and request meetings from your Salesforce calendar. Events can then be synced between external calendars and Salesforce.



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 **Sharing > Calendar Sync**, and under **Service Appointments** and **Resource Absence** configure the following settings.

Setting	Description
Synchronize Services from Salesforce calendar events	<p>If enabled, whenever an Event record is created, and the Event Record Type field is the same as the Calendar Event Type setting, a Work Order and Service Appointment is created.</p> <ul style="list-style-type: none"> • If the event's Subject matches the name of an existing Work Type, the service appointment's parent Work Order is created using that Work Type. • The event's Start Time is mapped and synced to the service appointment's Scheduled Start Time. • The event's End Time is mapped and synced to the service appointment's Scheduled End Time. • The event's Assigned To field is mapped and synced to the service appointment's Assigned Resource. • The event's Location is mapped to the service appointment's Service Territory. • The event's Related To field is mapped to the matching service appointment record.
Synchronize Services to Salesforce calendar events	<p>If enabled, whenever a service appointment's Status is set to Dispatched, an Event record is created for the assigned service resource.</p> <ul style="list-style-type: none"> • The service appointment's Work Type is mapped and synced to the event's Subject. • The service appointment's Scheduled Start Time is mapped and synced to the event's Start Time.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


USER PERMISSIONS

To sync services and resource absences to Salesforce calendar events:

- Create and Edit on service appointments and Edit on Resource Absence

To sync services and resource absences from Salesforce calendar events:

- Create and Edit on service appointments and Edit on Resource Absence

Setting	Description
	<ul style="list-style-type: none"> • The service appointment's Scheduled End Time is mapped and synced to the event's End Time. • The service appointment's Assigned Resource is mapped and synced to the event's Assigned To field. • The service appointment's Service Territory is mapped and synced to the event's Location. <p>If there are multiple assigned resources, an Event record is only created for the first assigned resource.</p> <p>If the service appointment is reassigned, the event's assigned owner isn't updated.</p> <p>If the event's assigned owner is updated the service appointment's Assigned Resource is also updated.</p> <p>If the service appointment is rescheduled, the Event Start and End time are updated, but only if the service appointment has a parent record of type Work Order or Work Order Line Item.</p> <p> Important: For Field Service, if the service appointment's Scheduled Start to Schedule End is greater than 14 days, events aren't created in the Salesforce calendar due to a 14-day limit.</p>
Calendar Event type	The value on the event Type field on the Event object that controls whether a Service Appointment and Work Order are created.
Enforce validations when syncing Service Appointments and Salesforce calendar events	<p>Controls whether to ignore the update if the matching record can't be updated, or to continue without updating the matching record.</p> <p>For example, if this setting isn't enabled and you update the service appointment Scheduled Start Time, and there's a validation rule on the Event object that prevents updates to the event's Start Time, the scheduled appointment is updated, but the event isn't. The event still has the service appointment's original Start Time. If this setting is enabled, both records aren't updated.</p>
Synchronize Absences from Salesforce calendar	<p>If enabled, whenever an Event record is created and the event Type field is the same as the calendar event Type setting, a Resource Absence record is created for the assigned user.</p> <ul style="list-style-type: none"> • The event's Subject is mapped and synced to the resource absence's Type. Make sure to fill in the event's Subject field. If left empty, the resource absence's Type field is set to the default value. • The event's Start and End fields are mapped and synced to the corresponding resource absence fields. • The event's Assigned To field is mapped and synced to the resource absence's Resource field. The user in the Assigned To field must have a service resource linked to it. The resource

Setting	Description
	absence's Resource field is the service resource that is linked to the user in the event's Assigned To field.
Synchronize Absences to Salesforce calendar	If enabled, whenever a Resource Absence record with Record Type Non-Availability is created for a service resource, an Event record is created for the User linked to the service resource record. When you create an event with Event Type = Absence, the Resource Absence record is created and the Type field is set to the Subject of the event. An Inactive value is created for the Type field if it doesn't exist.
Calendar Event type	The value on the Event Type field on the Event object that controls whether a Resource Absence record is created.
Enforce validations when syncing resource absences and Salesforce calendar events	Controls whether to ignore an update if the matching record can't be updated, or to continue without updating the matching record.

Considerations

- Child events aren't supported.
- Recurring events create a single Service Appointment record and a single Resource Absence record.
- Crews aren't supported since the Service Resource, as a Crew, doesn't have a User to assign appointments to.
- When creating, updating, or deleting events in bulk, if one of the event records results in a failure, Calendar Sync doesn't sync any of the events in that request.
- You can't create an event of type Resource Absence or Service Appointment when the Name field is populated with a Lead, or the Related To field is populated with any value. The Related To field is preserved for the Resource Absence or Service Appointment that is created and linked after the new event is inserted. You can't relate an event to a Lead record if the event is already linked to another object through the Related To field.
- Since Site Guest Users can't be assigned with Edit Events permission, Calendar Sync with Site Guest User isn't supported. This means that events aren't created, changed, or deleted after a Guest user has changed a Service Appointment or Resource Absence.

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- **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.

[Customize Inventory Settings in Field Service](#)

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.

[Create Serialized Inventory](#)

In Field Service, use serialized products to assign a serial number to an asset type to track and manage your inventory.

SEE ALSO:

[Product Item and Inventory Fields](#)

[Product Request and Transfer Fields](#)

[Set Up Inventory Access for Mobile Workers](#)

[Manage Your Field Service Inventory](#)

[Set Up Inventory Access for Mobile Workers](#)

[Manage Your Field Service Inventory](#)

Customize Inventory Settings in Field Service

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

1. Assign user permissions.

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 set field history tracking:

- Customize Application

To create and edit users:

- Manage Internal Users

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



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

Page Layout	Recommended Customizations for Inventory Management
Location	<ul style="list-style-type: none"> • Arrange the fields. • Important: <ul style="list-style-type: none"> – 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: <ul style="list-style-type: none"> – 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.

Page Layout	Recommended Customizations for Inventory Management
	<ul style="list-style-type: none"> – The Associated Locations related list shows related accounts. – The Child Locations related list shows locations within the location, such as vehicles which are parked at a warehouse when not in use. – The Maintenance Plans related list shows maintenance plans linked to the location. – The Product Items related list shows product items (inventory) stored at the location. – The Product Transfers (Source) related list shows product transfers that originated at the location. – The Product Transfers (Destination) related list shows product transfers in which items were transferred to the location. – The Service Territory Locations related list shows related service territories, which usually indicates that the location is within the territory.
Address	<ul style="list-style-type: none"> • 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	<p>Associated locations let you associate multiple accounts with one location. For example, a shopping center location may have multiple customer accounts.</p> <ul style="list-style-type: none"> • Arrange the fields, which appear in the Associated Locations related list on locations and accounts.
Product	<ul style="list-style-type: none"> • Confirm that your layout includes the following related lists: <ul style="list-style-type: none"> – 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. <ol style="list-style-type: none"> a. From Setup, enter <i>Products</i> 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	<p>Arrange the fields that appear in the Products Consumed related list.</p>
Product item	<ul style="list-style-type: none"> • Arrange the fields. • Confirm that your layout includes the following related lists. <ul style="list-style-type: none"> – 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.

Page Layout	Recommended Customizations for Inventory Management
Product item transaction	Arrange the fields that appear in the Product Item Transactions related list.
Product request	<ul style="list-style-type: none"> • 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. <ul style="list-style-type: none"> – 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	<ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> – 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Arrange the fields. • Confirm that your layout includes the following related lists: <ul style="list-style-type: none"> – 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	<ul style="list-style-type: none"> • Arrange the fields. • Confirm that your layout includes the following related lists: <ul style="list-style-type: none"> – 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	<ul style="list-style-type: none"> • Arrange the fields. • Optionally, customize the Status field values. The default values are Shipped and Delivered.

Page Layout	Recommended Customizations for Inventory Management
	<ul style="list-style-type: none"> • Confirm that your layout includes the Product Transfers related list, which shows transfers that the shipment fulfills.
Work order Work order line item	Confirm that your layouts include the following related lists. <ul style="list-style-type: none"> • The Products Required related list shows products needed to complete the work. • The Products Consumed related list shows product items used to complete the work. • The Product Requests related list shows product requests created to ensure that the assigned service resources have the parts they need to complete the work. • The Product Request Line Items related list shows product request line items associated with the work. • The Return Orders related list shows return orders associated with the work. • The Return Order Line Items related list shows return order line items associated with the work.

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.

SEE ALSO:

[Product Item and Inventory Fields](#)

[Product Request and Transfer Fields](#)

[Location Fields for Field Service](#)

Create Inventory Locations for Field Service

USER PERMISSIONS

To create locations:	Create on locations
To view associated locations:	Read on accounts
To create, update, or delete associated locations:	Edit on accounts
To view addresses:	Read on locations
To create, update, or delete addresses:	Edit on locations

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 you associate the location with items in your inventory, known as product items.
5. If the location can be moved, like a van or tool box, select **Mobile Location**.
6. Complete the other [fields](#) as appropriate.
7. Click **Save**.
8. In the Addresses related list, create addresses for the location. The available types of addresses are Mailing, Shipping, Billing, and Home.
9. In the Files related list, attach files like blueprints, photographs, or registration information.
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.

SEE ALSO:

[Location Fields for Field Service](#)

[Location Fields for Field Service](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

SEE ALSO:

- [Product Item and Inventory Fields](#)
- [Manage Your Field Service Inventory](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 product items:

- Create on product items

To view product item transactions:

- Read on product items

To create, update, or delete product item transactions:

- Edit on product items

Create Serialized Inventory

USER PERMISSIONS

To create product items:	Create on product items
To view product item transactions:	Read on product items
To create product item transactions:	Create on product items
To update product item transactions:	Edit on product items
To delete product item transactions:	Modify All Records or Modify All Data on product items
To create serialized products	Create on serialized products

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

In Field Service, use serialized products to assign a serial number to an asset type to track and manage your inventory.

Before you can send serialized products in a product transfer, you must create a product that is serialized, and create the product item with serialized products. When creating product items, you can only use locations that are designated [Create Inventory Locations for Field Service](#).

1. Create a product that is serialized.
 - a. From the App Launcher, open **Products** and click **New**.
 - b. For the **Transfer Record Mode**, select **Send and Receive** or **Receive only**.
 - c. Enter the **Product Name**.
 - d. Check **Serialized**.
 - e. To create an additional product that is serialized, click **Save and New**.
 - f. Save your work.
2. Create the product item by entering the product name and location.
 - a. From the App Launcher, open **Product Items** and click **New**.
 - b. Use the lookup field to select a **Product Name**.
 - c. Use the lookup field to select the **Location** where the product item is stored.
 - d. Enter *0.00* for the **Quantity on Hand**. The quantity on hand is updated when you add serialized products to the product item.
 - e. Save your work.
3. Add the serialized items for the product that are at the location.
 - a. On the Related tab of the Product Item, go to **Serialized Products** and click **New**.
 - b. Enter the **Serial Number**.
 - c. Use the lookup field to select a serialized **Product**.
 - d. To add additional serialized products, click **Save and New**.
 - e. Save your work.

Get Ready for Field Service Scheduling and Optimization

Define your service appointment lifecycle, configure appointment booking settings, and get to know your Field Service scheduling policies, optimization settings, and sharing settings. As of Summer '23 new Salesforce orgs have Enhanced Scheduling and Optimization enabled by default for all service territories. Existing orgs can continue to opt in and enable the enhanced engine for all or selected service territories. The enhanced engine is an improvement of the optimization functionality and associated manual and semiautomatic scheduling services. The enhanced architecture and services are more efficient and improve scalability, performance, and schedule quality.

 *This is a Field Service managed package feature.*

Watch the video to see how to optimize scheduling using the innovative new engine, built for greater scalability, precision, schedule quality, and performance alongside some new features such as Travel Modes, Holiday Management, and Service Appointment Sliding.

 [Watch a video](#)

Watch the video to see how you can benefit from improved schedule quality using the innovative new engine available by default for new users as of Summer '23, and easily transitioned to by existing users, for all territories. The video covers additional supported features and the new offsite service appointment feature.

 [Watch a video](#)

[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.

[How Does the Field Service Optimization Engine Work?](#)

Need a few contractors onsite a week from now and need to know who's available? Absolutely have to have a specialist arrive to a service location in an hour? What about a regularly scheduled appointment for both the contractors and the specialist to service the same location?

[Adopt and Implement Enhanced Scheduling and Optimization](#)

Field Service's Enhanced Scheduling and Optimization replaces the optimization functionality and associated manual and semiautomatic scheduling services you've been using. The new architecture and services are more efficient and improve scalability, performance, and schedule quality. Built on the Hyperforce platform, Enhanced Scheduling and Optimization has performance and scale like never before and provides a framework to host innovative new functionality to take Salesforce Field Service to the next level. Learn more about setting up optimization and creating optimization jobs, explore optimization metrics, and get scheduling recommendations. Start your journey to Enhanced Scheduling and Optimization, with resources for every step of your way.

[Transition to Enhanced Scheduling and Optimization](#)

Salesforce orgs created in Summer '23 and later have Enhanced Scheduling and Optimization enabled by default for all service territories. Orgs created before Summer '23 can opt in and enable the enhanced engine for all or selected service territories and benefit from advanced features, more efficient services, and improved scalability, performance, and schedule quality.

[Activate Field Service Schedule Optimization](#)

Configure optimization so you can schedule appointments and address last-minute challenges. You can set up optimization to run regularly, or run it manually. Activate optimization to create an optimization profile and an optimization user. When using Enhanced Scheduling and Optimization, this activation isn't required.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

[Create the Field Service Integration Permission Set](#)

Create or update the Field Service Integration permission set to access data needed for optimization and automatic scheduling.

[Customize the Field 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.

[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 Service Appointment Sliding](#)

Free up time for scheduling more appointments when using appointment booking and scheduling. Service appointments on the Gantt for the same resource can move to an earlier or later time, within the resource's availability. Sliding service appointments provides more time slot availability and faster SLA compliance and enables the scheduling of longer service appointments by reducing white spaces.

[Set Up Travel Modes](#)

Optimization services with different travel modes enhance predictive travel by providing more accurate travel time predictions and improving the completion rate of service appointments. By leveraging different types of travel modes, admins define the travel mode per territory, per primary service territory member, or both, to reflect transportation type (car, light truck, heavy truck, bicycle, or walking), the use of toll roads, and hazmat considerations.

[Create and Manage Field Service 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 Field Service 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 Field Service scheduling policy to guide schedule optimization.

[Manage Rule Validation Checks](#)

Set how often rules are checked for violations, and what triggers automatic rule validation checks.

[Create and Manage Field 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.

[Optimize Field Service 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 Relevance Groups](#)

A relevance group in Field Service is a group of appointments or 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.

[Fix Overlaps by Using an Automated Scheduling Flow \(Beta\)](#)

Tackle Field Service scheduling challenges with an automated flow that addresses and fixes schedule overlaps that occur due to an appointment ending late. Use the flow template recommendations or adjust the template to suit your specific use case.

[Create Scheduling Recipes for Common Events](#)

Tackle common Field Service 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.

[Field Service Scheduling and Optimization Services](#)

Scheduling and optimization includes services used to schedule, reschedule, and unschedule service appointments.

[Reserve Time Slots for Designated Types of Work](#)

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

[Enable Multiday Field 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.

[Manage Work Capacity in Field Service](#)

Control the work performed by your workforce according to dynamic company priorities.

[What’s Available in Enhanced Scheduling and Optimization](#)

Review some highlights of the Field Service Enhanced Scheduling and Optimization engine.

[Enable Enhanced Scheduling and Optimization](#)

Enhanced Scheduling and Optimization must be enabled to start using its features. As of Summer '23, new Salesforce orgs have Enhanced Scheduling and Optimization enabled by default for all service territories. Existing orgs can opt in and enable the enhanced engine for all or selected service territories. The enhanced engine is an improvement of the optimization functionality and associated manual and semiautomatic scheduling services you’ve been using. The enhanced architecture and services are more efficient and improve scalability, performance, and schedule quality. Make sure you examine the Enhanced Scheduling and Optimization considerations and limitations before using the enhanced engine.

[Set Up Enhanced Optimization for Field Service Territories](#)

As of Summer '23 new Salesforce orgs have Enhanced Scheduling and Optimization enabled for all service territories. Existing orgs can switch to use Enhanced Scheduling and Optimization for all service territories or per territory. Enhanced Optimization per Territory enables you to deploy Enhanced Scheduling and Optimization only on selected territories, for example, territories with simpler scheduling scenarios. This gradual rollout lets you keep the more complex scheduling scenarios for later releases, when all the service territory features are supported.

SEE ALSO:

[Optimize Your Field Service Schedule](#)

[Optimize Your Field Service Schedule](#)

[Adopt and Implement Enhanced Scheduling and Optimization](#)

[What’s Schedule Optimization?](#)

[Requirements for Appointment Insights \(Beta\)](#)

[Set Up Enhanced Optimization for Field Service Territories](#)

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.

Before Optimization	After Optimization
62 scheduled hours	69.5 scheduled hours
24 minutes average travel	15 minutes average travel
51 scheduled appointments	56 scheduled appointments

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.


Component	Description
Scheduling policy	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.
Work rule	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.
Service objective	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.

Component	Description
Relevance group	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 unchedules an appointment and can't find another suitable slot, the appointment remains unscheduled after the optimization is completed. Scheduled service appointments that have already started (Scheduled Start time is in the past) are considered by the optimizer as pinned and aren't moved or unscheduled. The service appointment's travel time can be updated since the next service appointment can be updated.

When optimizing your team's or a service resource's schedule, appointments with rule violations remain pinned. With Enhanced Scheduling and Optimization, the optimization engine tries to fix rule violations to improve the schedule by rescheduling or uncheduling rule violating appointments. To keep these appointments scheduled as is on the Gantt, the service appointments must first be pinned or in a pinned status.

 **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.

SEE ALSO:

[Adopt and Implement Enhanced Scheduling and Optimization](#)

[Get Ready for Field Service Scheduling and Optimization](#)

[Activate Field Service Schedule Optimization](#)

How Does the Field Service Optimization Engine Work?

Need a few contractors onsite a week from now and need to know who's available? Absolutely have to have a specialist arrive to a service location in an hour? What about a regularly scheduled appointment for both the contractors and the specialist to service the same location?

Why You Should Optimize

These tasks can be simple to schedule individually. Manually constructing an efficient schedule for collective tasks can be a nightmare even for an expert administrator!

The good news is that you can let Field Service's optimization engine do the work for you. By generating an optimal schedule for your team and customers, according to your priorities and constraints, schedule optimization helps you comply with service-level agreements and minimize travel time, overtime, costs, and no-shows.

How is this done? For a given time horizon, optimization grades assignments based on service objectives in the scheduling policy, 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.

It's important to prepare for the inevitability of scale. Scale in customer calls, scale in resource appointments, scale in travel time and even overtime expense.

Schedules and availability are key to assigning resources, tracking projects, and ensuring customer satisfaction. The optimization engine considers all of the available resources and appointment times and uses the scheduling policies that you set to find the most qualified candidate and time slot based on your service objectives. Scheduled service appointments that have already started (Scheduled Start time is in the past) are considered by the optimizer as pinned and aren't moved or unscheduled. The service appointment's travel time can be updated since the next service appointment can be updated.

Optimization Process

1. The optimization engine receives all the relevant service appointment, service territory, and service resource data for the given time horizon.
2. The appointments are then ordered according to priority, and evaluated accordingly. The priority is defined using the Work Order Priority Field, Work Order Line Item Priority Field, and Service Appointment Priority Field options in Field Service Settings. Then it starts to evaluate the highest priority appointment first.
3. The optimization engine then compares the prioritized appointment's details, such as territory, required skills, and due date, to the scheduling policy's work rules.
4. Work rules help filter out unqualified or unavailable candidates.
5. It views the scheduling policy's work rules. Work rules remove candidates who can't complete the appointment because they're unqualified or unavailable. Now it has a pool of candidates who are ready and able to do the job.
6. The optimization engine searches for available time slots between a service appointment's earliest start permitted and due date (or arrival window start and end dates if they're available) within the time horizon.
7. Each available time slot and qualified candidate is then evaluated according to the scheduling policy's service objectives.
8. This process is then repeated for remaining slots and candidates, adds the scores, and assigns the appointment to the candidate and time slot with the highest score.







The optimizer continues to the next appointment on the list (ordered by priority) and repeats the process. When all service appointments sent to optimization are scheduled on the Gantt, or the Gantt is full, the schedule receives an overall Utilization grade.








Adopt and Implement Enhanced Scheduling and Optimization

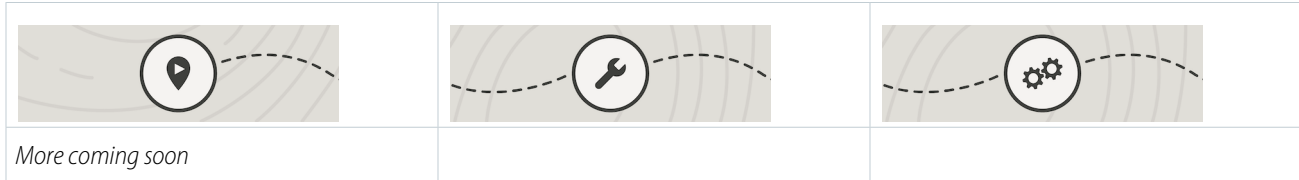
Field Service's Enhanced Scheduling and Optimization replaces the optimization functionality and associated manual and semiautomatic scheduling services you've been using. The new architecture and services are more efficient and improve scalability, performance, and schedule quality. Built on the Hyperforce platform, Enhanced Scheduling and Optimization has performance and scale like never before and provides a framework to host innovative new functionality to take Salesforce Field Service to the next level. Learn more about setting up optimization and creating optimization jobs, explore optimization metrics, and get scheduling recommendations. Start your journey to Enhanced Scheduling and Optimization, with resources for every step of your way.



Your Guide to Enhanced Scheduling and Optimization

		
Get Started	Set Up Enhanced Scheduling and Optimization	Create a Scheduled Optimization Job
Get Ready for Scheduling and Optimization	Enable Enhanced Scheduling and Optimization	Manage Scheduled Jobs
What's Available in Enhanced Scheduling and Optimization	Create the Field Service Integration Permission Set	
What's Schedule Optimization?	Configure Remote Site Settings	
Video: Enhanced Scheduling and Optimization (Summer '23)	(Enable Point-to-Point Routing) Set Up Routing for Travel Time Calculations	
What's the Fate of Existing Salesforce Customizations?	Considerations for Point-to-Point Predictive Routing	
Additional Resources:	Set Up Enhanced Optimization per Territory	
Video: Enhanced Scheduling and Optimization (Spring '23)	Additional Resources:	
Video: Optimization Enablement Basics - Optimization Challenge	Transition to Enhanced Scheduling and Optimization	
Create and Manage Scheduling Policies		
Create and Manage Work Rules		
Create and Manage Service Objectives		
		
Optimize your Schedule	Enhanced Features	Considerations and Limitations

		
Optimize Your Field Service Schedule	Video: Travel Modes	Limits and Limitations for Enhanced Scheduling and Optimization
Optimize Today's Schedule	Set Up Travel Modes	Limitations for Enhanced Optimization per Territory
Optimize a Single Resource's Schedule	Video: Service Appointment Sliding	Considerations for Enhanced Scheduling and Optimization
Trailhead: Field Service Optimization	Enable Service Appointment Sliding	Field Service Limits and Limitations
	Video: Flexible Breaks	
	(Flexible Breaks) Work Rule Type: Service Resource Availability and Work Rule Entry Type: Service Resource Availability	
	Video: Holiday Management	
	Add Holidays to Operating Hours	
	Video: Complex Work	
	Complex Work in Field Service	
		
Best Practices	Explore Metrics in the Optimization Hub	Improve your Schedule with Appointment Insights
<i>Coming soon</i>	Explore Metrics in Optimization Hub	Get Recommendations with Appointment Insights
	Learn About Optimization Hub	
	Set Up Optimization Hub	
	View Optimization Hub	
		
Monitor and Troubleshoot:		
Monitor Optimization Requests		



SEE ALSO:

- [Optimize Your Field Service Schedule](#)
- [Get Ready for Field Service Scheduling and Optimization](#)
- [What's Schedule Optimization?](#)
- [Transition to Enhanced Scheduling and Optimization](#)

Transition to Enhanced Scheduling and Optimization

USER PERMISSIONS

To enable Field Service:	Customize Application
To install the Field Service managed package:	Customize Application
To assign a permission set license:	Manage Users
To create a permission set:	Manage Profiles and Permission Sets
To enable Enhanced Scheduling and Optimization:	Customize Application


EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer** Editions

Salesforce orgs created in Summer '23 and later have Enhanced Scheduling and Optimization enabled by default for all service territories. Orgs created before Summer '23 can opt in and enable the enhanced engine for all or selected service territories and benefit from advanced features, more efficient services, and improved scalability, performance, and schedule quality.

 *This is a Field Service managed package feature.*

To transition to Enhanced Scheduling and Optimization, make sure that you meet these requirements.

- Field Service is enabled.
 - The latest version of the Salesforce Field Service managed package is installed.
-  **Note:** Enhanced Scheduling and Optimization uses point-to-point predictive routing regardless of the travel time calculation preferences set in the Routing section of Field Service Settings.

Automatically Transition to Enhanced Scheduling and Optimization

Users prior to Summer '23 can easily upgrade all service territories to use Enhanced Scheduling and Optimization with a guided flow (recommended) comprising readiness checks and links to Salesforce Help. Discover what configuration updates are required for your Salesforce org, get workarounds for unsupported features, and review the differences in behavior when using the enhanced engine.

1. In the Field Service Admin app, go to Field Service Settings.
2. Select Getting Started and then select the Home tab, or go directly to the Activation page under Optimization.
3. Click **Run Readiness Check**.

- Review the information and click to learn more in Salesforce Help. Only the steps relevant to your Salesforce org are shown. Then enable Enhanced Scheduling and Optimization for all service territories. All the required settings are automatically

Optimization

[ACTIVATION](#) [LOGIC](#) [SCHEDULED JOBS](#) [ADVANCED PARAMETERS](#)


Enhanced Scheduling and Optimization

Improve scalability, performance and schedule quality with Enhanced Scheduling and Optimization. The architecture and services are more efficient and improve scalability, performance and schedule quality.

Before using Enhanced Scheduling and Optimization, let's check if there are any issues that need to be resolved. We recommend testing the optimization first in a sandbox environment.

Run Readiness Check


▶ Watch Video





Manually Transition to Enhanced Scheduling and Optimization

Transition to Enhanced Scheduling and Optimization for all or selected territories. Configure your Salesforce org to transition smoothly to the enhanced engine.

- [Enable Enhanced Scheduling and Optimization and Field Service Integration](#) in Setup under Field Service Settings.
- [Create or update the required permission sets](#) in Field Service Settings.
- Check whether the Enhanced Scheduling and Optimization service is configured in [Remote Sites Settings](#). This service is typically created automatically.
- Check that point-to-point predictive routing is enabled in **Field Service Settings > Scheduling > Routing**. Enhanced Scheduling and Optimization uses point-to-point predictive routing regardless of the travel time calculation preferences set in the Routing section of Field Service Settings.
- [Configure Enhanced Scheduling and Optimization per territory](#). To enable Enhanced Scheduling and Optimization for a territory, select **Use enhanced scheduling and optimization** in the service territory record. If the checkbox isn't available, add it to the Service Territory page layout. Review the [limits and considerations](#) that apply when you're using Enhanced Optimization per Territory.

 **Note:** Use of the Enhanced Scheduling and Optimization services is controlled by the service territory. Some territories can be enabled to use Enhanced Scheduling and Optimization while others aren't, based on your rollout strategy. You can select to enable all service territories to use Enhanced Scheduling and Optimization in **Field Service Settings > Scheduling > General Logic**.
- (Optional) To use background optimization such as global or in-day optimization, [create a scheduled optimization job](#). The Enhanced Optimization job type includes additional options.
 - Time periods let you set up one job for multiple optimization horizons instead of separate jobs.
 - Territory grouping lets you create multiple optimization groups within the same optimization job. Each optimization request includes all the service territories in the group for each time period. For example, if you have three time periods and five groups, 15 optimization requests run. You can only add territories enabled for Enhanced Scheduling and Optimization to a group.
- To reserve time slots for designated types of work [create a recordset filter criteria for designated work](#).
- Check all your Service Resource Availability work rules. If either or both of the Travel From Home (minutes) and Travel To Home (minutes) fields are empty, this means that you allow service resources to travel for an unlimited time outside of their shift times. To maintain the same behavior when transitioning to Enhanced Scheduling and Optimization, enter a very high value, for example, 500 minutes in the Travel To/From Home fields.

9. (Optional) Enhanced Scheduling and Optimization provides innovative features that were previously unavailable. Explore and apply these features to your solution as needed.
 - [Set up travel modes](#) and define different modes of transportation per service territory or service territory member to calculate travel based on that mode of transportation.
 - [Set up sliding](#) to allow Appointment Booking to find more available time slots by sliding scheduled appointments left or right to squeeze in a new appointment.
 - [Create multiple flexible breaks](#) with break timings that have a configurable offset from the start of the working day instead of a static hour. Create up to three breaks in a day and set a latest scheduled time for breaks.
 - [Create holidays](#) to set non-working times for the duration of the holiday period. Create holiday shifts for service resources who are available to work during the holiday.
 - [Explore metrics in Optimization Hub](#). Use this enhanced version of Optimization Insights to provide KPI metric data on optimization requests and to show statistical improvements the optimizer made.
 - [Create time and resource dependencies](#) between appointments to enforce scheduling constraints. Enhanced Scheduling and Optimization supports up to five Service appointments in a complex work chain.
 - [Use Gradeless Appointment Booking](#) to improve the performance of appointment booking response time by removing objectives from your appointment booking scheduling policy. By not specifying objectives, you save processing time required for scoring the slot, and appointment booking only needs to find the first slot available instead of comparing against all service resources that offer the slot.
 - Use Schedule Mode to get more information on what action caused the most recent change in schedule. Additional options in Schedule Mode, available with Enhanced Scheduling and Optimization, provide more transparency: Manual, Drag and Drop, Schedule, Global Optimization, In-Day Optimization, and Resource Optimization. Schedule Mode appears on the service appointment record.
 - [Mark Offsite Appointments](#) to indicate that the appointment can be done remotely, with no travel time added to the schedule. For example, work such as remote technical assistance, filling out reports, or renewal of health and safety certification can be done from anywhere.
 - [Fix Schedule Overlaps](#) using an automated scheduling flow. The flow optimizes resource schedules to resolve schedule overlaps that occur due to an appointment ending late. Use the flow template recommendations or adjust the template to suit your specific use case.
 -  **Note:** The enhanced optimizer can automatically unschedule and try to resolve appointments that are scheduled in violation of rules. Manual intervention is no longer required to resolve rule violations before optimization. Appointments that need to stay in rule violation can be pinned.
10. [Fine-tune the scheduling policy](#).
 11. After testing Enhanced Scheduling and Optimization in a test environment, enable Enhanced Scheduling and Optimization for one or two service territories in production and evaluate the results. Use the Optimization Hub to collect scheduling KPI data and get feedback from business users. After you've verified that the pilot tests are successful, enable more service territories and make adjustments where required.
-  **Note:** You enable Enhanced Scheduling and Optimization scheduling services by service territory. This configuration lets you use the standard optimization engine for any service territories with use cases that aren't supported by Enhanced Scheduling and Optimization. When optimizing multiple territories, you must enable or disable all the territories for Enhanced Scheduling and

Optimization. Create separate optimization jobs for Enhanced Scheduling and Optimization and for territories that aren't enabled for Enhanced Scheduling and Optimization.

SEE ALSO:

- [Enable Enhanced Scheduling and Optimization](#)
- [Configure Enhanced Optimization per Territory](#)
- [Set Up Enhanced Optimization for Field Service Territories](#)
- [Enable Field Service](#)
- [Install the Field Service Managed Package](#)
- [Assign Field Service Permissions](#)
- [Limits and Limitations for Enhanced Scheduling and Optimization](#)
- [Create Field Service Permission Sets](#)
- [Set Up Routing for Travel Time Calculations](#)
- [Adopt and Implement Enhanced Scheduling and Optimization](#)

Activate Field Service Schedule Optimization

Configure optimization so you can schedule appointments and address last-minute challenges. You can set up optimization to run regularly, or run it manually. Activate optimization to create an optimization profile and an optimization user. When using Enhanced Scheduling and Optimization, this activation isn't required.

 *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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 users:

- [Manage Internal Users](#)

Optimization includes these scheduling features.

Feature	Description	Learn More
In-day optimization	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.	Optimize Today's Field Service Schedule
Scheduling recipes	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	Create Scheduling Recipes for Common Events
Predictive travel	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.	Set Up Routing for Travel Time Calculations
Point-to-point predictive routing	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.	Set Up Routing for Travel Time Calculations
Shift availability	Shifts let you define variable working periods, create shifts for particular dates and times and assign them to service resources.	Manage Field Service Shifts

SEE ALSO:

[Optimize Your Field Service Schedule](#)

[What's Schedule Optimization?](#)

Create the Field Service Integration Permission Set

Create or update the Field Service Integration permission set to access data needed for optimization and automatic scheduling.

 *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**.
3. On the Field Service Integration tile, click **Create Permissions** or **Update Permissions**.

When a permission set is current, the Create Permissions or Update Permissions link on the tile is replaced by a message indicating that it's up to date.

SEE ALSO:

[Assign Field Service Permissions](#)

[Create Field Service Permission Sets](#)

Customize the Field 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.

 **Note:** When creating custom statuses, consider the status naming as there's a 40-character limit for status transitions. The status transition is defined as: Status 1 - Status 2. If this definition exceeds 40 characters, including the dash and the spaces, then the status transition isn't saved.

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

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To configure the Field Service managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:


- Manage Profiles and Permission Sets

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

When Fix Overlaps unschedules and reschedules service appointments from the Gantt, it ignores the settings in the service appointment lifecycle.

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.

SEE ALSO:

[Auto-Dispatch Service Resources](#)

[Service Appointment Fields for Field Service](#)


[Manage Field Service Appointments](#)

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.*

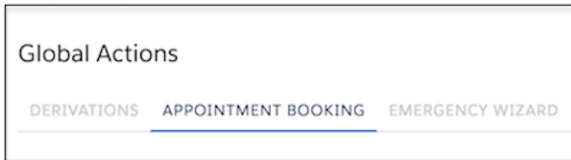
1. From the App Launcher, find and open the **Field Service Admin** app, and then click the **Field Service Settings** tab.
2. Select **Global Actions > Appointment Booking**.
3. Configure your settings.



 **Note:** You can quickly find the first valid, but not necessarily the best, option per appointment slot with Enhanced Scheduling and Optimization. By not specifying service objectives in the scheduling policy, the scheduling engine returns available time slots for appointments without grading them. For complex work, the scheduling engine returns the next available time slot, regardless of the scheduling policy's objectives. For example, resource A can be scheduled on Monday from 10:00 AM-12:00 PM with 30-minutes additional travel time, and resource B can also be scheduled in that slot with only 5-minutes travel (same slot, different resource, with higher grade). With gradeless appointment booking, the engine returns the first option that it finds, without checking all possible options and grading them.


EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



Field Name	Description
Default scheduling policy	<p>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.</p> <p> Tip:</p> <ul style="list-style-type: none"> 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	<p>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.</p> <p>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.</p> <p> Tip: If different appointment booking windows are needed for different level of service, add entitlements to your work orders. For example, standard customers get 4-hour booking windows while VIP customers get 2-hour windows. In the Operating Hours field on the entitlement, select the appropriate appointment booking window operating hours.</p>
Ideal grading threshold	<p>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.</p>
Recommended grading threshold	<p>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,</p>

Field Name	Description
	appointments with a grade below the ideal grading threshold and equal to or higher than the recommended grading threshold have a Recommended flag.
Minimum Grade	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 below this value aren't shown in the list.
Number of hours for initial appointment search	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.
Show grades explanation	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.
Custom CSS (cascading style sheet)	To customize the appearance of the Book Appointment and Candidates actions, enter a name of a CSS file.
Disable service territory picker in appointment booking	Hide the service territory field in the Book Appointment action.
Pin three highest graded time slots to the top	Highlight the three highest-graded time slots and pin them to the top of the list in a Golden Slots section.
Open extended view by default	<p>Display appointment details in the extended view. When this option isn't selected, users must click Show More Options to see the Earliest Start Permitted and Due Date fields.</p> <p> Note: 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.</p>

[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.

SEE ALSO:

- [Manage Field Service Appointments](#)
- [Manage Field Service Appointments](#)
- [Schedule Service Appointments for Field Service](#)
- [Set Up the Self-Service Scheduling Flow](#)
- [Add Self-Service Scheduling to Your Experience Builder Site](#)

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 > Global Actions > 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.

SEE ALSO:

[Guidelines for Creating Operating Hours for Field Service](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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 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 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 —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. Point-to-point predictive travel supports calculating routes that include transport by ferries. Transport by ferry is calculated at a fixed rate of 5 km/hr (or 3.1 mph). Create travel modes per territory, resource, or both for accurate routing calculations based on transportation type, toll road preferences, and the presence of hazardous materials. The default travel mode is set to car, using toll roads, and not carrying hazardous materials.

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**.

Enhanced Scheduling and Optimization uses point-to-point predictive routing regardless of the travel time calculation preferences set in the Routing section of Field Service Settings. Aerial routing is used when Enhanced Scheduling and Optimization can't calculate travel time using predictive travel. A route can be unfeasible with predictive travel if travel mode limitations apply, a location is more than 1.5 kilometers from an official road, or data coverage is partial. For example, the dispatcher wants to manually assign the work to Alan as he's the only available resource. Alan drives a truck, but the route that Alan is assigned to doesn't allow trucks. Or, Alan is assigned to maintain an asset that's located 2 kilometers from a road, or in a new neighborhood. The travel source used to calculate the travel time to the service appointment, resource absence, or home base is automatically shown in the Estimated Travel Time From Source and Estimated Travel Time To Source fields for the assigned resource or resource absence.

Considerations When Using Enhanced Scheduling and Optimization

Pay attention to the considerations if you're using Enhanced Scheduling and Optimization.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


- Point-to-point predictive routing is used regardless of the travel distance.
- Service resources must have their home base location geocoded so that the scheduling engine knows the resource's start and end points.
- 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.
- The Estimated Travel Time From Source field on Assigned Resources 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.
- The Maximum Travel from Home work rule always uses aerial routing calculation regardless of point-to-point predictive routing or SLR.

Considerations When Not Using Enhanced Scheduling and Optimization

Pay attention to the considerations if you aren't using Enhanced Scheduling and Optimization.

- Point-to-point predictive routing considers using toll roads when relevant. SLR and Predictive travel 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 Estimated Travel Time From Source field on Assigned Resources 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.
- Predictive travel isn't supported with multiday work scheduling. In multiday work scheduling, the exact departure time for each day is unknown, so SLR is used, corresponding to the fastest travel time (the best SLR travel time that you would get on a night slot with minimum traffic). Complex work uses point-to-point predictive routing in optimization, and the most optimistic SLR travel time for platform scheduling.
- 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 aren't 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.
 - Unlike SLR, which creates a grid of 200-meter squares, point-to-point predictive routing uses the exact locations of objects for scheduling.
 - For a location (source or destination) that's more than 1.5 kilometers from the nearest road, aerial routing is used instead of point-to-point predictive routing.
 - Aerial routing is used when Enhanced Scheduling and Optimization can't calculate travel time using point-to-point predictive routing. A route can be unfeasible with predictive travel if travel mode limitations apply or data coverage is partial.
 - 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 can 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). If you aren't using Enhanced Scheduling and Optimization, you must apply the Fix Overlaps scheduling policy.

Navigable Countries

The availability of point-to-point predictive routing in a region depends on the map coverage level for that region.

SEE ALSO:

- [View a Field Service Resource's Daily Travel Route](#)
- [Work Rule Type: Maximum Travel from Home](#)
- [Working in the Field Service Dispatcher Console Map](#)
- [Enable Enhanced Scheduling and Optimization](#)
- [Transition to Enhanced Scheduling and Optimization](#)

Navigable Countries

The availability of point-to-point predictive routing in a region depends on the map coverage level for that region.

 *This is a Field Service managed package feature.*

The following countries support this level of routing.

- Algeria
- Albania
- American Samoa
- Andorra
- Argentina
- Australia
- Bahamas
- Bahrain
- Belgium
- Bosnia and Herzegovina

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- Botswana
- Brazil
- Brunei
- Bulgaria
- Burkina Faso
- Cameroon
- Canada
- Cayman Islands
- Central African Republic
- Chad
- Chile
- Colombia
- Congo, Republic of the
- Costa Rica
- Cote d'Ivoire (Ivory Coast)
- Croatia
- Cyprus
- Czechia
- Denmark
- Egypt
- Equatorial Guinea
- Estonia
- Eswatini
- Falkland Islands (Islas Malvinas)
- Finland
- France
- French Guiana
- Gabon
- Germany
- Gibraltar
- Greece
- Guadeloupe
- Guam
- Hong Kong
- Hungary
- Iceland
- India
- Indonesia
- Iraq
- Ireland

- Isle of Man
- Israel
- Italy
- Jordan
- Kazakhstan
- Kenya
- Kosovo
- Kuwait
- Latvia
- Lebanon
- Lesotho
- Libya
- Liechtenstein
- Lithuania
- Luxembourg
- Macau
- Malaysia
- Malta
- Martinique
- Mauritania
- Mauritius
- Mayotte
- Mexico
- Monaco
- Montenegro
- Morocco
- Mozambique
- Namibia
- Netherlands
- New Zealand
- Nigeria
- North Macedonia
- Norway
- Oman
- Panama
- Paraguay
- Peru
- Philippines
- Poland
- Portugal (Azores, Madeira)

- Puerto Rico
- Qatar
- Reunion Island
- Romania
- Russia
- Saint Barthélemy
- Saint Helena
- San Marino
- Sao Tome and Principe
- Saudi Arabia
- Serbia
- Singapore
- Slovakia
- Slovenia
- South Africa
- Spain
- Sweden
- Switzerland
- Sweden
- Switzerland
- Taiwan
- Thailand
- Tunisia
- Türkiye
- Ukraine
- United Arab Emirates
- United Kingdom (UK)
- Uruguay
- USA
- Vatican City
- Venezuela
- Vietnam
- Virgin Islands (USA)
- Zambia
- Zimbabwe

Low Coverage Countries

Low coverage areas provide minimum map coverage. These countries are missing routes or traffic information required for accurate point-to-point travel predictions.

- Belarus

- Japan
- Moldova

Enable Service Appointment Sliding

Free up time for scheduling more appointments when using appointment booking and scheduling. Service appointments on the Gantt for the same resource can move to an earlier or later time, within the resource's availability. Sliding service appointments provides more time slot availability and faster SLA compliance and enables the scheduling of longer service appointments by reducing white spaces.



This is a Field Service managed package feature.

Watch the video to see how to free up time for a new service appointment when using appointment booking and scheduling operations by sliding service appointments on the Gantt to an earlier or later time, within the resource's availability.

 [Watch a video](#)

Before you enable service appointment sliding, make sure you meet these requirements.

- Field Service is enabled.
 - The latest version of the Salesforce Field Service managed package is installed.
 - Enhanced Scheduling and Optimization is enabled.
1. From the App Launcher, open the Field Service Admin app, and then click the **Field Service Settings** tab.
 2. Select **Scheduling | General Logic**.
 3. Select **Enable service appointment sliding**.
 4. Select **Enable Complex Work Sliding by Territory** for complex work chains scheduled to multiple resources (for example, same start appointments).



Note: Service appointment sliding doesn't reshuffle scheduled appointments or violate any scheduling rules, and pinned service appointments aren't moved.

[Considerations for Service Appointment Sliding](#)

Before you start using Service Appointment Sliding, make sure you review some considerations.

SEE ALSO:

[Get Ready for Enhanced Scheduling and Optimization](#)

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer Editions**

USER PERMISSIONS

To enable service appointment sliding:

- [Customize Application](#)

Considerations for Service Appointment Sliding

Before you start using Service Appointment Sliding, make sure you review some considerations.



This is a Field Service managed package feature.

- Service appointments can't move from one resource to another.
- Service appointments can't be unscheduled.
- Service appointments can move left and right within the shift without changing the order of the service appointments scheduled in the shift.
- Sliding service appointment functionality is applicable to appointment booking and schedule services only.
- Pinned service appointments can't be moved.
- Service appointments that are part of a complex work chain and are scheduled to multiple resources can move only to the right.
- If a service appointment that's part of a complex work chain is violating a work rule, the entire chain is considered pinned.
- Sliding isn't supported for service appointments that are scheduled during shifts that span over midnight.

In addition to these considerations, all [Limits and Limitations for Enhanced Scheduling and Optimization](#) apply to Service Appointment Sliding.

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer Editions**

Set Up Travel Modes

Optimization services with different travel modes enhance predictive travel by providing more accurate travel time predictions and improving the completion rate of service appointments. By leveraging different types of travel modes, admins define the travel mode per territory, per primary service territory member, or both, to reflect transportation type (car, light truck, heavy truck, bicycle, or walking), the use of toll roads, and hazmat considerations.




This is a Field Service managed package feature.

Watch the video to see how to calculate accurate travel times when scheduling service appointments, based on transportation type, permission to use toll roads, and the presence of hazardous materials.



[Watch a video](#)

Before you set up Travel Modes, make sure you meet these requirements.

- Field Service is enabled.
 - The latest version of the Salesforce Field Service managed package is installed.
 - Enhanced Scheduling and Optimization is enabled.
-  **Note:** Enhanced Scheduling and Optimization uses point-to-point predictive routing regardless of the travel time calculation preferences set in the Routing section of Field Service Settings.

Travel modes are applied only to territories using Enhanced Scheduling and Optimization. Travel mode can't be assigned to a secondary service territory member. All [Limits and Limitations for Enhanced Scheduling and Optimization](#) apply to travel modes.

[Configure Travel Modes](#)

Configure your Travel Modes settings and assign user permissions.

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer Editions**

[Create Travel Modes for Field Service](#)

Create travel modes per territory, resource, or both so that routing calculations are accurate based on the transportation type, whether the resource can drive through toll roads, and whether the resource is carrying hazardous materials.

[Assign a Travel Mode to a Service Territory or Service Territory Member](#)

Assign a travel mode to a service territory or to a service territory member so that the Enhanced Scheduling and Optimization engine can consider the resource's routing and travel preferences. Routing requests are based on the travel mode selected at the service territory level unless specified otherwise at the resource level. In this case, the resource territory membership setting overrides the territory-level setting. Only primary territory members can have a travel mode assigned to them.

SEE ALSO:

[Enable Enhanced Scheduling and Optimization](#)[Set Up Enhanced Optimization for Field Service Territories](#)[Set Up Routing for Travel Time Calculations](#)

Configure Travel Modes

Configure your Travel Modes settings and assign user permissions.



This is a Field Service managed package feature.

1. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**. Next, click **Service Territory** or **Service Territory Member**, and then scroll to the Page Layouts section.
2. Click **Page Layouts**, and then click **FSL Service Territory Layout** or **FSL Service Territory Member Layout**.
3. Click **Edit**, drag the **Travel Modes** field to the page layout, and then save your changes.

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer Editions**

USER PERMISSIONS

To enable travel modes:

- Customize Application

To view travel modes:

- Read on travel modes

OR

Any of these custom permission sets:

- Field Service Admin Permissions
- Field Service Agent Permissions
- Field Service Dispatcher Permissions

To create, update, or delete travel modes:

- Edit on travel modes

To assign a travel mode to a service territory or service territory member:

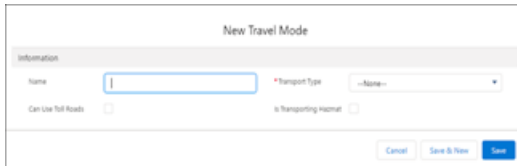
- Edit on service territory and/or service territory member

Create Travel Modes for Field Service

Create travel modes per territory, resource, or both so that routing calculations are accurate based on the transportation type, whether the resource can drive through toll roads, and whether the resource is carrying hazardous materials.

 This is a Field Service managed package feature.


1. From the Travel Modes tab, click **New**.
2. Select a travel mode name.



3. Select the transport type: Car (default), Light Truck, Heavy Truck, Bicycle, or Walking. The truck category that you select is based on the truck's measurements and maximum load capacity.

Transport Type	Weight (kg)	Height (m)	Length (m)	Width (m)
Light Truck	8,500	4.3	12.5	2.5
Heavy Truck	15,000	4.6	19	3.5

4. Indicate whether the travel mode can use toll roads and whether it's transporting hazmat, and then save your changes.

 **Note:** When you select walking or bicycle, the hazmat and toll roads settings are ignored during calculation.

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view travel modes:

- Read on travel modes


To create, update, or delete travel modes:

- Edit on travel modes

Assign a Travel Mode to a Service Territory or Service Territory Member

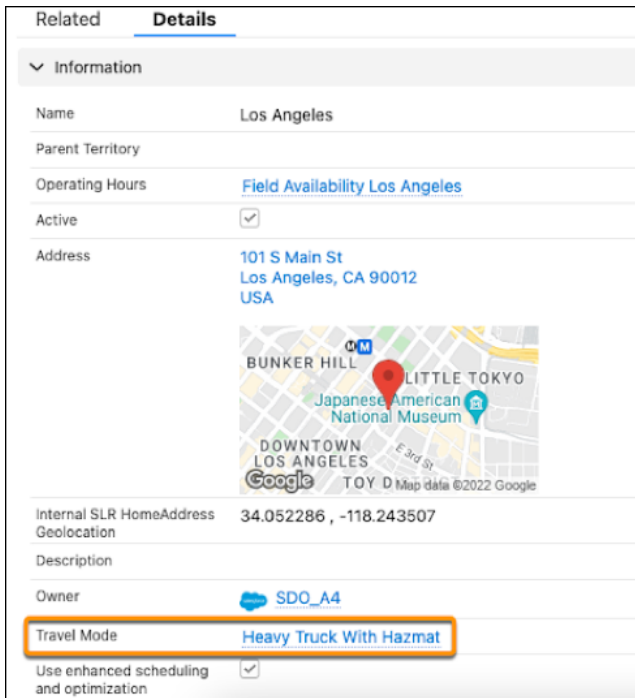
Assign a travel mode to a service territory or to a service territory member so that the Enhanced Scheduling and Optimization engine can consider the resource's routing and travel preferences. Routing requests are based on the travel mode selected at the service territory level unless specified otherwise at the resource level. In this case, the resource territory membership setting overrides the territory-level setting. Only primary territory members can have a travel mode assigned to them.



 This is a Field Service managed package feature.

 **Note:** Enhanced Scheduling and Optimization uses point-to-point predictive routing regardless of the travel time calculation preferences set in the Routing section of Field Service Settings.

Travel modes are applied only to territories using Enhanced Scheduling and Optimization. Travel mode can't be assigned to a secondary service territory member. All [Limits and Limitations for Enhanced Scheduling and Optimization](#) apply to travel modes.

1. From the Service Territories tab, click a service territory, and then edit the Travel Mode field.



Related	Details
<p>Information</p>	
Name	Los Angeles
Parent Territory	
Operating Hours	Field Availability Los Angeles
Active	<input checked="" type="checkbox"/>
Address	101 S Main St Los Angeles, CA 90012 USA
	
Internal SLR HomeAddress Geolocation	34.052286 , -118.243507
Description	
Owner	 SDO_A4
Travel Mode	Heavy Truck With Hazmat
Use enhanced scheduling and optimization	<input checked="" type="checkbox"/>

2. Select a travel mode, and then save your changes.
3. To select a travel mode for a particular service territory member, click the service territory Related tab, and then click the required service resource name under Service Territory Members. The service resource must be a primary territory member.
4. Edit the resource's service territory.

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer Editions**

USER PERMISSIONS

To view travel modes:

- Read on travel modes

To create, update, or delete travel modes:

- Edit on travel modes

To assign a travel mode to a service territory or service territory member:

- Edit on service territory and/or service territory member

5. Select the travel mode for that resource and save.


Create and Manage Field Service 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.

 This is a Field Service managed package feature.

Scheduling policies are made up of two elements:

- Work rules refine the list of candidates for a service appointment by rejecting service resources that violate any rule.
- Service objectives represent the policy’s purpose. You can weight each objective to indicate its importance.

 **Note:** For Appointment Booking, you can quickly find the first valid, but not necessarily the best, option per appointment slot by not specifying service objectives in the scheduling policy. The Enhanced Scheduling and Optimization engine returns the next available time slot for appointments without grading them. For complex work, it returns the next available time slot, regardless of the scheduling policy’s objectives. For example, resource A can be scheduled on Monday from 10:00 AM-12:00 PM with 30-minutes additional travel time, and resource B can also be scheduled in that slot with only 5-minutes travel (same slot, different resource, with higher grade). With gradeless appointment booking, the engine returns the first option that it finds, without checking all possible options and grading them.

Standard Scheduling Policies

Field Service includes four standard scheduling policies. You can customize these policies or create your own.

Scheduling Policy	Description
Customer First	Balances great customer service with travel minimization. Appointments are graded first by the customer’s selection of a preferred employee and then by

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Scheduling Policy	Description
	the ability to schedule the appointment as soon as possible. Travel minimization is the second priority.
High Intensity	Typically used in times of high service volumes, like a storm scenario, where you need employee productivity is higher priority than customer preferences.
Soft Boundaries	Identical to the Customer First policy, but allows the sharing of employees between territories to enhance service coverage.
Emergency	Used with the Emergency Chatter action to dispatch emergency service appointments.

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.

High Intensity

Scheduling Policy Work Rule (6+) New

WORK RULE NAME	
Active Resources	▼
Due Date	▼
Earliest Start Permitted	▼
Finish	▼
Match Skills	▼
Match Territory	▼

[View All](#)

Scheduling Policy Objectives (3) New


SERVICE GOAL NAME	WEIGHT	
ASAP	2	▼
Minimize Travel	7	▼
Preferred Service Resource	1	▼

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.

Action	Steps
Select a policy for scheduled optimization jobs	From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab. Then, click Optimization > Scheduled Jobs . Update the Scheduling Policy field on any scheduled job to list your preferred policy.
Select a default scheduling policy for scheduling from the dispatcher console	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 update the Default scheduling policy field.
Select a default scheduling policy for the Book Appointment and Candidates actions	From the App Launcher, find and open the Field Service Admin app, and then click the Field Service Settings tab. Click Global Actions > Appointment Booking and update the Default scheduling policy field.
Select a policy in the dispatcher console appointment list	The Policy field in the appointment list shows the default dispatcher console scheduling policy, but can be updated before a dispatcher optimizes the schedule.

 **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.

Field Name	Description
Commit Mode	<p>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. Global optimization always runs in the <i>Always Commit</i> mode. The field has two options:</p> <ul style="list-style-type: none"> <i>Always Commit</i> (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. <i>Rollback</i>—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. <p>For example, if you begin a scheduled job to optimize April 2–5, any change made to the April 1–6 schedule causes the</p>

Field Name	Description
	optimization to be rolled back. Changes include creating, updating, and deleting resource absences and service appointments.
Description	Description of the policy.
Fix Overlaps	<p>(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:</p> <ul style="list-style-type: none"> • 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. <p>Fix Overlaps in global optimization and in-day optimization addresses only overlaps between service appointments and ignores overlaps with Resource Absences.</p> <p>If Fix Overlaps isn't selected, overlaps are left as is.</p> <p>When using Enhanced Scheduling and Optimization, overlaps are always fixed, such that this Fix Overlaps option isn't relevant.</p>
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.

 **Note:** Several fix overlaps features are available in Field Service.

- When you're scheduling service appointments on the Gantt, an appointment can overlap with another appointment or an absence. The [Fix Overlaps](#) feature in the managed package dynamic Gantt is used to reschedule overlapping appointments according to your configured settings. For example, when you can't find a valid schedule for an appointment, select to put the appointment in jeopardy, unreschedule it, or reshuffle other assignments. This Fix Overlaps feature isn't supported by Enhanced Scheduling and Optimization.
- Don't confuse the dynamic Gantt Fix Overlaps option with the [Fix Overlaps](#) option in the scheduling policy. If Fix Overlaps is selected in the scheduling policy, service appointment overlaps are addressed during in-day or global optimization and overlaps with Resource Absences are ignored. When overlaps are being fixed, the overlapping appointments are unrescheduled. If the optimization engine can't find a valid schedule for any appointments, these appointments remain unrescheduled. If Fix Overlaps isn't selected, overlaps are left as is. When using Enhanced Scheduling and Optimization, overlaps are addressed regardless of the Fix Overlaps setting in the scheduling policy, such that this option isn't relevant.
- You can [create scheduling recipes](#) that address what happens to your schedule during resource schedule optimization due to appointment cancellations, time changes, and overlaps. Scheduling recipes aren't supported by Enhanced Scheduling and Optimization.
- The [Fix Schedule Overlaps flow \(Beta\)](#) replaces scheduling recipes when you're using Enhanced Scheduling and Optimization to resolve overlaps that occur when a mobile worker finishes an appointment late.

Fine-Tune the Scheduling Policy

Salesforce orgs created in Summer '23 and later have Enhanced Scheduling and Optimization enabled by default for all service territories. Orgs created before Summer '23 can opt in and enable the enhanced engine for all or selected service territories. When transitioning to use the enhanced engine, you can adjust the scheduling policy to change the results to better match your KPIs.

Fine-Tune the Scheduling Policy

Salesforce orgs created in Summer '23 and later have Enhanced Scheduling and Optimization enabled by default for all service territories. Orgs created before Summer '23 can opt in and enable the enhanced engine for all or selected service territories. When transitioning to use the enhanced engine, you can adjust the scheduling policy to change the results to better match your KPIs.

 *This is a Field Service managed package feature.*

Although the enhanced engine algorithm is based on the same grading principles, it's possible that for the same set of data the schedule is different from the schedule created when not you're using the enhanced engine. Whether the schedule is better or not depends on the customer's scheduling objectives.

We recommend testing the enhanced engine by simulating the optimization of a schedule and measuring the results. If the results aren't what you want, tweak the scheduling policy weightings.

1. Collect production-like data in a sandbox to use for simulation testing. Preferably perform a refresh from production into a full sandbox.
2. Select two or three service territories to perform simulation testing on. Preferably choose diverse territories so you can test on a dataset that is representative of all your Salesforce data.
3. Create a copy of the legacy scheduling policy.
4. Review the scheduling policy for any rules that the current release doesn't support. If you find any, remove them from the policy.
5. Enable Optimization Insights.
6. Run Global Optimization on the selected service territories for a time horizon that is used in optimizers in production. It's easier to use the API to run the test because it gives you the ability to choose future dates so that the current time doesn't overlap the testing time horizon.
7. Measure the results.
 - Measure runtime.
 - Collect results using Optimization Insights to determine how many appointments were scheduled, utilization, travel time, and more metrics, according to your specific business KPIs.
 - Take screenshots of the Gantt.
 - If possible, save the schedule by exporting the service appointment schedule times and Assigned Resource records for analysis.
8. Run the same test one or two more times and average out the result. The result acts as the baseline metric to compare against.
9. Unschedule all the appointments in the testing data domain.
10. Enable Enhanced Scheduling and Optimization on the selected service territories and use the new scheduling policy that was created to perform the same simulations with the global optimizer.
11. Measure the results again.
 - Measure runtime.
 - Collect results using the [Optimization Hub](#) to determine how many appointments were scheduled, utilization, travel time, and more metrics.

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer Editions**

USER PERMISSIONS

To enable Enhanced Scheduling and Optimization:

- [Customize Application](#)

- Take screenshots of the Gantt.
 - If possible, save the schedule by exporting the service appointment schedule times and Assigned Resource records for analysis.
12. Compare the results from the baseline and Enhanced Scheduling and Optimization tests and review them with your customer. Look at differences in KPIs to measure the overall impact and the screenshots of the Gantt in case qualitative differences exist. If they're unacceptable, you must tune the scheduling policy.
 13. Consider using weighting values in the order of 100. For example, if the current scheduling policy has weighting values of less than 100, multiply them by 100. The Enhanced Scheduling and Optimization engine prefers larger values of objective weighting to make the effect of an objective more pronounced.
 14. Increase or decrease the values of the objective weights based on feedback from the customer. Remember that objective weights are relative to one another.
 15. Run the same simulation tests again and capture the results. Continue to tweak the scheduling policy and retest until the results are acceptable.

After an acceptable result is achieved, use the new scheduling policy for all territories enabled for Enhanced Scheduling and Optimization.

Create and Manage Field Service 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 Field Service scheduling policy to guide schedule optimization.



This is a Field Service managed package feature.

Watch the video to see how to optimize scheduling performance using work rules.



[Watch a video](#)

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 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Considerations

Work rules are either database or Apex rules. Each has their own impact on performance and efficiency.

Database rules are applied at the SOQL query clause level. These rules immediately disqualify resources and query only the resources that you need, so performance isn't impacted.

Apex rules are applied after the initial set of service resources are returned from the database SOQL query. Like an Apex "for loop", Apex rules iterate over all resources returned and must validate that the resources meet specified rule criteria. The additional Apex processing impacts performance.

Even though Apex rules have a greater impact on performance than database rules do, Apex rules can still be used. Without Apex or database rules to limit the resources found eligible to perform the work, too much work can create a bigger issue for overall performance and even trigger a CPU timeout.

All database rules are aggregated into one SOQL query and applied in no particular order. Also, because they're used for grading resources, applying service objectives happens after applying all work rules, increasing the amount of Apex processing.

Even though service objectives in your scheduling policy can affect performance, specifying service objectives can be necessary and required from a business value standpoint. You can choose to apply service objectives to get the best candidate according to the work rules and company scheduling policy. Or you can choose to get a valid candidate quickly, without affecting performance, by applying just the work rules.

Field Service Work Rule Types

[Work Rule Type: Work Capacity](#)

The Work Capacity Apex work rule type sets limits for the work capacity of service resources in a given service territory according to specified criteria.

[Work Rule Type: Count Rule](#)

Use a Field Service Apex Count work rule 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](#)

The Excluded Resources Apex 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 database 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](#)

Match Boolean is a Field Service Apex work rule type that enforces scheduling preferences based on a checkbox (Boolean) field on service resources.

[Work Rule Type: Match Fields](#)

Match Fields is a Field Service Apex work rule type that matches a service appointment field with a service resources field. It's a great way to enforce requirements based on custom fields.

[Work Rule Type: Match Skills](#)

Match Skills is a Field Service Apex work rule type that matches a service appointment'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](#)

Match Territory is a database work rule type that ensures that a service appointment is assigned only to Field Service Primary or Relocation members of the appointment's service territory.

[Work Rule Type: Match Time Rule](#)

Match Time Rule is a Field Service Apex work rule type that 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](#)

Maximum Travel from Home is a Field Service database work rule type for setting the maximum distance or travel time between a 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](#)

Required Resources is a Field Service Apex work rule type that ensures that a service appointment's required resource preferences 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](#)

Service Appointment Visiting Hours is an Apex work rule type that 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](#)

Service Crew Resources Availability is an Apex work rule type that 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](#)

Service Resource Availability is an Apex work rule type that ensures that a service resource is available to perform a service appointment. You can schedule breaks automatically, account for travel time, or set up short breaks between service appointments. Every scheduling policy needs a work rule of this type, or resource absences aren't respected during scheduling.

[Work Rule Type: TimeSlot Designated Work](#)

The Field Service TimeSlot Designated Work Apex 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](#)

Working Territories is a Field Service database work rule type that enforces primary and secondary service territory memberships.

SEE ALSO:

[Work Rule Type: Working Territories](#)[Work Rule Type: Service Appointment Visiting Hours](#)[Work Rule Type: Service Resource Availability](#)[Work Rule Type: Required Resources](#)[Work Rule Type: Maximum Travel from Home](#)[Work Rule Type: Match Time Rule](#)[Work Rule Type: Match Territory](#)[Work Rule Type: Match Skills](#)[Work Rule Type: TimeSlot Designated Work](#)[Work Rule Type: Count Rule](#)[Work Rule Type: Excluded Resources](#)[Work Rule Type: Match Boolean](#)[Work Rule Type: Match Fields](#)[Work Rule Type: Extended Match](#)[Work Rule Type: Service Crew Resources Availability](#)[Create and Manage Field Service Objectives](#)[Create Relevance Groups](#)

Work Rule Type: Work Capacity

The Work Capacity Apex work rule type sets limits for the work capacity of service resources in a given service territory according to specified criteria.

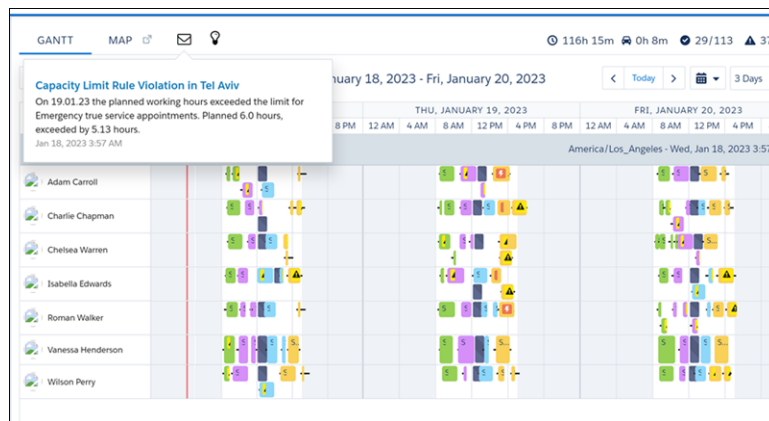
 *This is a Field Service managed package feature.*

This rule enables adding capacity limits to policies.

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.

Check Work Capacity Rule Violations

You can see notifications for Work Capacity rule violations for all service appointments in a service territory in the Notification Center. The violations for individual service appointments aren't shown on the Gantt.



SEE ALSO:

[Apply the Work Capacity Rule to Scheduling Policies](#)

Work Rule Type: Count Rule

Use a Field Service Apex Count work rule 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.

Field	Description
Time Resolution	Time span for the count. The resolution is daily.
Count Type	What the rule counts: assignments, durations, or a custom field value.
Count Object	Object used in the count. If the rule counts assignments or durations, the object is a service

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

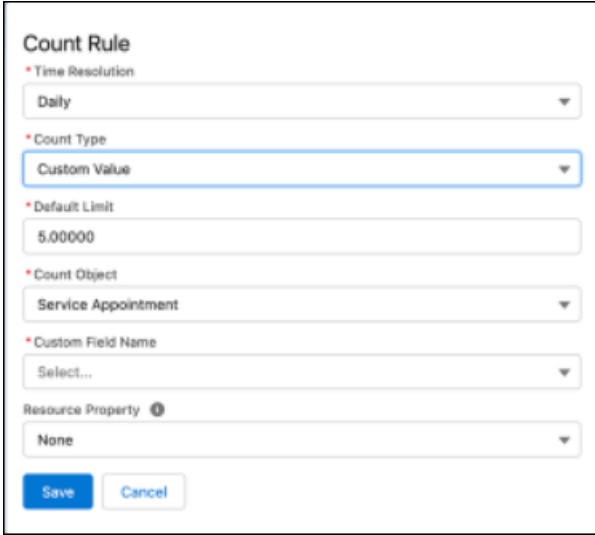
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

Field	Description
	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.
Custom Field	Custom field name.
Default Limit	Default count limit.
Resource Property	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.

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.

Use the Count Rule custom Lightning component helper to configure the Count work rule. Add the Count Rule LWC to the Count Rule record type page layout. By using the Count Rule LWC you avoid having to first manually add the API name of the resource property you're counting against as a value to the Resource Property picklist on the work rule object.



Count Rule


- * Time Resolution: Daily
- * Count Type: Custom Value
- * Default Limit: 5,00000
- * Count Object: Service Appointment
- * Custom Field Name: Select...
- Resource Property: None

Save Cancel

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 considers 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.

 **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, add workers to relevance groups based on truck size and create rules using those groups.

Considerations When Using Enhanced Scheduling and Optimization

Pay attention to these considerations if you're using Enhanced Scheduling and Optimization.

- In a policy, you can add up to ten 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 work 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.
- The Count work rule uses midnight as the Start of Day even if it's customized to a different value.
- Multiday work isn't supported with Count work rules.
- You can set up Count work rules for crews. Count work rules don't apply to individual service resources while they're part of a crew.
- Count work rules ignore capacity-based resources.
- If you use the Count work rule on a custom field, the limitation considers the order of scheduled appointments, ensuring that your workers don't exceed the set limit at any point throughout the day. For example, you have a custom field that checks the capacity of your workers' vehicle, and the Count work rule is set to 10. Throughout the day, a driver picks up five units, picks up another eight units, and then drops off four units. The Count work rule registers this violation on the second service appointment and on all the following appointments that day. The total count value at any time during the day can't be negative.
- The Count work rule doesn't apply to capacity-based resources.

Considerations When Not Using Enhanced Scheduling and Optimization

Pay attention to these considerations if you aren't using Enhanced Scheduling and Optimization.

- In a policy, you can add up to ten 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 work 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.
- The Count work rule uses midnight as the Start of Day even if it's customized to a different value.
- Multiday work isn't supported with Count work rules.
- Complex work isn'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 work rules for crews. Count work rules don't apply to individual service resources while they're part of a crew.
- Count work rules ignore capacity-based resources.
- The Count work rule doesn't apply to capacity-based resources.

SEE ALSO:

[Create Relevance Groups](#)

[Work Rules: Considerations](#)

Work Rule Type: Excluded Resources

The Excluded Resources Apex 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.*

Sometimes, customers have a poor experience with a service resource and request not to work with them in the future. 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.

SEE ALSO:

[Add Service Resource Preferences in Field Service](#)

[Add Service Resource Preferences in Field Service](#)

[Work Rules: Considerations](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Work Rule Type: Extended Match

Use the Extended Match database 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 114.

A work rule of this type contains the following settings.


Field	Description
Service Appointment Matching Field	The service appointment lookup field value that you're matching. The field must be of the type Lookup. When using Enhanced Scheduling and Optimization, if the service appointment matching field is empty, all resources are considered valid.
Linking Object	The junction object used to link service resources to the object that the service appointment matching field references.
Linking Object Reference Field	The reference field on the linking object that is matched with the Service Appointment Matching Field. When using Enhanced Scheduling and Optimization, if the Linking Object Reference Field is empty, then the service resource isn't a valid candidate for any service appointment with matching field requirements.

Field	Description
Time-Phased	Indicates whether the work rule applies only to a certain time period.
Start Date Field Name	The Date-Time field name on the Linking Object that represents the start time. This field is required when you select Time-Phased.
End Date Field Name	The Date-Time field name on the Linking Object that represents the end time. This field is required when you select Time-Phased.

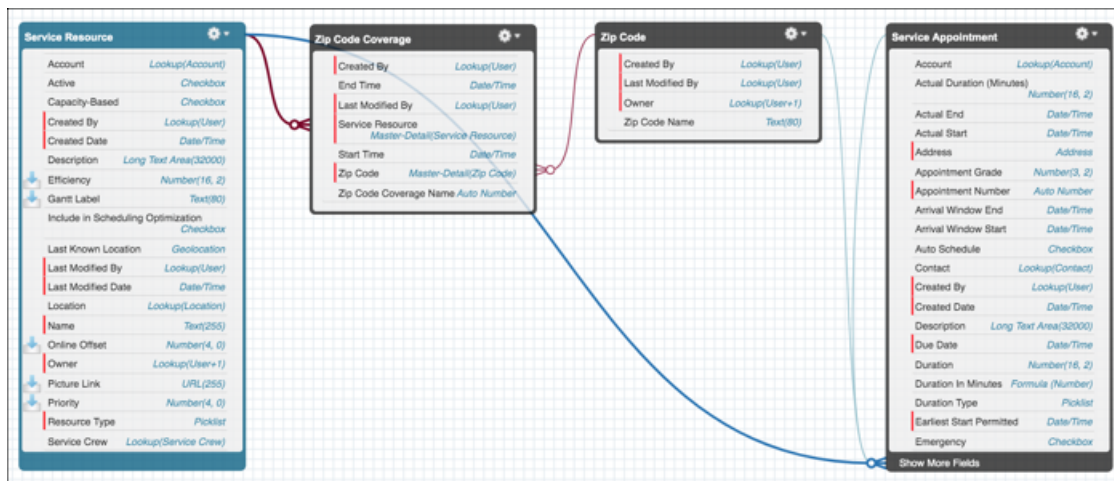
 **Note:** To avoid a potential scheduling or optimization crash, we recommend that when you create Linking Object records, you populate both the Linking Object Reference field and the Service Resource Reference field.


After you create the data model for your work rule, finish setting it up by creating a work rule from the Work Rules tab. Use the Extended Match Rule custom Lightning Component helper, or enter the fields manually.

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.



 **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.

SEE ALSO:

[Work Rules: Considerations](#)

Work Rule Type: Match Boolean

Match Boolean is a Field Service Apex work rule type that 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.

Field Name	Description
Resource Property	The API name of the checkbox field on service resources that defines the scheduling requirement. For example, <code>IsActive</code> .
Value is True	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. When using Enhanced Scheduling and Optimization, if the Boolean field on the service resource is empty, the rule isn't applied.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

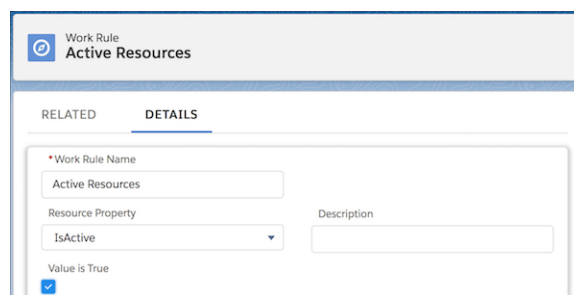
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

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.



The screenshot shows the configuration for the 'Active Resources' work rule. The 'Work Rule Name' is 'Active Resources'. The 'Resource Property' is set to 'IsActive'. The 'Value is True' checkbox is checked. The 'Description' field is empty.

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.

SEE ALSO:

[Service Resource Fields for Field Service](#)

[Work Rules: Considerations](#)

Work Rule Type: Match Fields

Match Fields is a Field Service Apex work rule type that matches a service appointment field with a service resources field. 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.

Field Name	Description
Service Property	The API name of the field on service appointments that helps define the scheduling requirement. All primitive data types are supported. When using Enhanced Scheduling and Optimization, if the service appointment matching field is empty, all service resources are considered valid.
Boolean Operator	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.
Resource Property	The API name of the field on service resources that helps define the scheduling requirement. All primitive data types are supported. When using Enhanced Scheduling and Optimization, if the resource matching field is empty, then the service resource isn't a valid candidate for any service appointment with matching field requirements.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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 are supported for schedule optimization only when using Enhanced Scheduling and 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.

SEE ALSO:

[Service Resource Fields for Field Service](#)

[Service Appointment Fields for Field Service](#)

[Work Rules: Considerations](#)

Work Rule Type: Match Skills

Match Skills is a Field Service Apex work rule type that matches a service appointment'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 contain the following settings.

Field Name	Description
Match Skill Level	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.
Skill Type Developer Name	If a skill type is selected, service resources that match the skill requirements of the skill type are considered as candidates.
Skill Type Logic	Defines the logic between the skill requirements as All Skills Match (AND) (this is the default) or At Least One Skill Matches (OR) . You set the logic for each skill type. Using the OR logic, you can qualify more service resources to match at least one, but not necessarily all, skill requirements of a certain skill type. For example, a service appointment requires a caregiver who is able to perform procedures required for diabetes care and the caregiver must speak English or Spanish. By using the OR logic, candidates aren't required to have all the skills in the Match Skills work rule. For example, speaking only one of the languages is sufficient. By using the AND logic, candidates must have all the skills for the skill type. If no Skill Type Developer Name is entered, the skill type logic applies to all the skills that have no skill type. When using Enhanced Scheduling and Optimization, if the service appointment doesn't have required skills specified, then all service resources are considered valid candidates. If a service resource has no assigned skills then the resource isn't a valid candidate for any service appointment with skill requirements.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

SEE ALSO:

[Create Skills for Field Service](#)

[Add Required Skills to Work Orders or Work Types for Field Service](#)

[Work Rules: Considerations](#)

Work Rule Type: Match Territory

Match Territory is a database work rule type that ensures that a service appointment is assigned only to Field Service 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. When using Enhanced Scheduling and Optimization, if the service appointment territory field is empty, all service resources from all territories are considered valid candidates.

 **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.

SEE ALSO:

[Create Service Resources for Field Service](#)

[Work Rules: Considerations](#)

Work Rule Type: Match Time Rule

Match Time Rule is a Field Service Apex work rule type that 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.

Field Name	Description
Service Schedule Time Property	Indicates whether the rule controls the service appointment's scheduled start time or scheduled end time. Custom date/time fields aren't supported.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

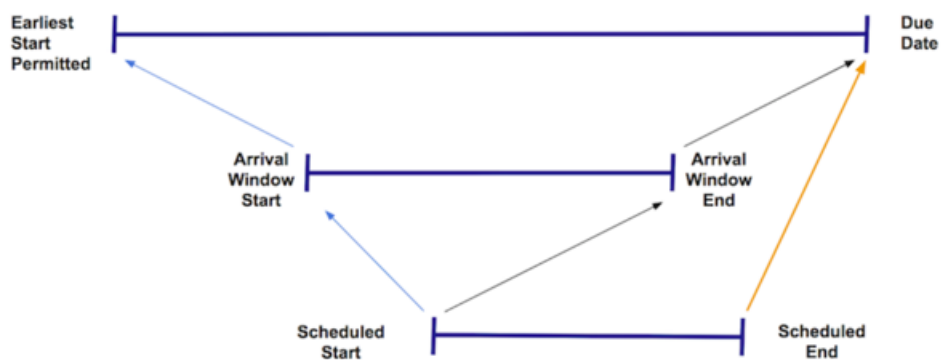
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

Field Name	Description
Service Time Operator	The required relationship between the Service Schedule Time Property and the Service Time Property. For example, if you select Equal , a service appointment's Service Schedule Time Property value must equal the appointment's Service Time Property value.
Service Time Property	The service appointment field that defines the work rule requirement. There are four options. <ul style="list-style-type: none"> • EarliestStartTime and DueDate together represent the total time frame during which an appointment must start and complete. • The ArrivalWindowStart and EndTime together represent the arrival window time frame promised to the customer. <p>! Important: Custom date/time fields aren't supported.</p>
Pass Empty Values	If the values of either of the Service Time Properties are empty, ignore this rule.

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.

SEE ALSO:


[Service Appointment Fields for Field Service](#)

[Work Rules: Considerations](#)

Work Rule Type: Maximum Travel from Home

Maximum Travel from Home is a Field Service database work rule type for setting the maximum distance or travel time between a 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.

Field	Description
Maximum Travel From Home Type	Indicates whether the work rule enforces a maximum travel time or maximum distance.
Maximum Travel From Home	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.
Relevance Groups	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: <ul style="list-style-type: none"> • Don't assign resources to maintenance appointments that are more than 20 miles from their home base. • Don't assign highly qualified workers to appointments that are more than 20 miles from their home base.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

SEE ALSO:

[Set Up Routing for Travel Time Calculations](#)

[Work Rules: Considerations](#)

Work Rule Type: Required Resources

Required Resources is a Field Service Apex work rule type that ensures that a service appointment's required resource preferences 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.

SEE ALSO:

[Add Service Resource Preferences in Field Service](#)

[Add Service Resource Preferences in Field Service](#)

[Work Rules: Considerations](#)

Work Rule Type: Service Appointment Visiting Hours

Service Appointment Visiting Hours is an Apex work rule type that 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.

When you're not using Enhanced Scheduling and Optimization:

- Operating hours use the time zone of the service appointment they're attached to.
- Visiting hours use the time zone of the service territory.
- The service appointment inherits its location's time zone. If the location has no time zone specified, GMT is used.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

When you're using Enhanced Scheduling and Optimization:

- Operating hours use the time zone of the service territory they're attached to.
- Visiting hours use the time zone of the operating hours record.
- You can add holidays that represent the time when customers aren't available to receive services. These holidays take precedence over the customers' preferences for operating hours.
- Multiday work doesn't support visiting hours.

 **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.

[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.

SEE ALSO:

[Guidelines for Creating Operating Hours for Field Service](#)

[Guidelines for Creating Operating Hours for Field Service](#)

[Work Rules: Considerations](#)

Work Rule Type: Service Crew Resources Availability

Service Crew Resources Availability is an Apex work rule type that 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 settings.

Field Name	Description
Consider Service Crew Membership	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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Maximum Additional Service Resources	Ensure that crews are optimally utilized and that no resources are idle by defining the maximum number of additional service resources, available when using Enhanced Scheduling and Optimization. For example, if a service appointment requires a minimum of 3 service resources in a crew, specify that a maximum of 2 additional resources are allocated to the crew. This maximum means that you can schedule a service appointment to a crew of size 3 to 5 service resources.

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.

SEE ALSO:

[Work Rules: Considerations](#)

Work Rule Type: Service Resource Availability

Service Resource Availability is an Apex work rule type that ensures that a service resource is available to perform a service appointment. You can schedule breaks automatically, account for travel time, or set up short breaks between service appointments. 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 have different policies on breaks, overtime, or before- and after-work travel time for full-time versus part-time employees. With Service Resource Availability work rules you can capture these differences.

The work rules consider these 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
- Break times
- The scheduled start and end time of other scheduled appointments

During the scheduling of capacity-based service resources, Service Resource Availability work rules fail in any of these cases.


- 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

Service Resource Availability work rules have these settings.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Fixed Gap	Enforce a minimum break time between service appointments. This setting is useful for remote consultants. For example, you want to provide 20 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 is selected.
Break Start	Set a single break time that the scheduling engine inserts between scheduled service appointments. For example, if service resources prefer to take lunch at 12:00 PM, enter 12:00. Breaks are scheduled as close as possible to the Break Start time, allowing for flexibility to start and complete appointments.
Break Duration	The length of the fixed break.
Overtime	Allow service appointments to be scheduled during time slots or shifts of the Extended type.
Travel From Home (minutes)	The number of minutes that the resource has available for travel before the start of the work day (at the resource's expense). When using Enhanced Scheduling and Optimization, if this field is empty, all travel will be scheduled within the work day. When not using Enhanced Scheduling and Optimization, if this field is empty, any amount of travel before the start of the work day is valid.
Travel To Home (minutes)	The number of minutes that the resource has available for travel after the end of the work day (at the resource's expense). When using Enhanced Scheduling and Optimization, if this field is empty, all travel will be scheduled within the work day. When not using Enhanced Scheduling and Optimization, if this field is empty, any amount of travel after the end of the work day is valid.

 **Note:** 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.

Travel

Complete 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 9:00 AM, then 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.

Break Schedules

There are two ways to add breaks to Service Resource Availability work rules.

- To set a single break at a fixed time, fill out the Break Schedule fields.
- To set up to three breaks that start relative to the beginning of the day, add [work rule entries](#). Enhanced Scheduling and Optimization must be enabled.

If you don't want to use breaks, leave these sections empty. You can't set both a fixed break and flexible breaks.

When you use the fixed Break Schedule settings, these conditions apply.

- A service resource's lunch break is created at the time defined in the Service 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 back 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-minute travel time to the appointment, then the break is pushed back 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 so that the break 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 then 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.



Note: We recommend that you avoid creating manual breaks so that only the scheduling engine creates and modifies breaks.

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 Entry Type: Service Resource Availability](#)

Field Service Resource Availability is an Apex work rule entry type that pairs with Service Resource Availability work rules to add scheduling details. Use work rule entries to add multiple flexible breaks that start relative to the beginning of a service resource's availability.

SEE ALSO:

[View a Field Service Resource's Calendar](#)

[Work Rules: Considerations](#)

[Create Service Resource Absences for Field Service](#)

[Show Resource Absences on the Map](#)

Work Rule Entry Type: Service Resource Availability

Field Service Resource Availability is an Apex work rule entry type that pairs with Service Resource Availability work rules to add scheduling details. Use work rule entries to add multiple flexible breaks that start relative to the beginning of a service resource's availability.

 *This is a Field Service managed package feature.*

Work rules entries have these fields.

Field Name	Description
Break Duration	The length of the break in minutes.
Earliest Break Start (minutes)	The minimum number of minutes between the start of the day and the beginning of the break. For example, enter 120 for a break at least two hours after the day starts.
Latest Break End (minutes)	The maximum number of minutes between the start of the day and the end of the break. For example, enter 300 for a break that ends five hours after the day starts.
Work Rule	The name of the associated work rule.
Work Rule Entry Name	An auto-number name for the work rule entry.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To view or add work rule entry fields, open the Object Manager in Setup and select the Work Rule custom object. Under Page Layouts, select **Related Lists** and drag Work Rule Entries to add it to your page layout.


 **Note:** 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.

Flexible Breaks

Watch the video to see how to schedule multiple flexible breaks with enhanced work rules.

 [Watch a video](#)

Flexible breaks are scheduled based on their duration and a time window relative to the beginning of the service resource's day. You can add up to three work rule entry breaks to work rules of the Service Resource Availability type. You can't add a break schedule to the parent work rule and use work rule entries.

 **Example:** Let's say you want to schedule breaks for mobile workers, and their shifts last about 10 hours. You want to schedule a 20-minute break about two hours into the day, a 45-minute meal break in the middle of the day, and another 20-minute break about two hours before the end of the shift. Create three work rule entries, with these settings:

Work Rule Entry	Break Duration	Earliest Break Start	Latest Break End
First break	20	100	180
Meal break	45	240	360
Second break	20	460	580

If the worker's availability starts at 8:00 AM, the first break is scheduled between 9:40 AM and 11:00 AM. The meal break happens between 12:00 PM and 2:00 PM, and the last break happens between 3:40 PM and 5:00 PM.

Work Rule Type: TimeSlot Designated Work

The Field Service TimeSlot Designated Work Apex 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.*

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.

This rule applies to all resources and service appointments, regardless of the rule's relevance group.

When this rule is configured, If an appointment doesn't meet the criteria of your designation, the scheduling optimizer won't schedule it within the time slot.

Service appointments without territories must match all the resource's designations in all their service territories.

SEE ALSO:

[Set Up Designated Work for Time Slots When Not Using Enhanced Scheduling and Optimization](#)

[Reserve Time Slots for Designated Types of Work](#)

[Work Rules: Considerations](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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

Working Territories is a Field Service database work rule type that 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. Secondary territory memberships must be identical to, or contained within, the primary territory membership for a particular time and resource. If the secondary territory memberships aren't fully covered by a primary territory membership, availability applies only to the overlapping period. When using Enhanced Scheduling and Optimization, the secondary service territory doesn't need to be contained within the primary service territory. Scheduling and optimization is supported only for service territories with at least one primary service territory member. 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

SEE ALSO:

[Create Service Resources for Field Service](#)

[Work Rules: Considerations](#)

Manage Rule Validation Checks

Set how often rules are checked for violations, and what triggers automatic rule validation checks.

 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. Then, click **Dispatcher Console UI > Gantt Configurations**.
2. Under **Rules Validations**, configure the following settings.

Setting	Description
Validate rules after indirect Gantt updates	If this option is selected, any indirect Gantt updates not made by the dispatcher trigger rule violation calculation.
Rule Validation Frequency	<ul style="list-style-type: none"> • On Demand: Check rules only when initiated manually by the dispatcher. The dispatcher initiates rule validation for single or multiple service appointments using the right-click menu on the Gantt chart or appointment list. The Check Rules button is used to initiate rule validation for all loaded data appearing on the Gantt chart and appointment list. This setting is the default for Salesforce orgs as of Summer '21. • After Direct Gantt Updates: Check rules after every update initiated by the dispatcher on the Gantt. Updates include scheduling by drag and drop, unscheduling a service appointment, or adding, removing, or modifying a Resource Absence. • Always: Check rules after every operation. This setting is the default for Salesforce orgs before Summer '21.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To enable dispatchers to check rules manually:

- Custom permission sets:

- Field Service Dispatcher Permissions
- Field Service Dispatcher License

Custom permissions:

- Enable Check Rules - All Services
- Gantt and List - Enable Check Rules
- Gantt and List - Enable Bulk Check Rule

Setting	Description
	<p>If you set the frequency to After Direct Gantt Updates or to Always, rule validation checks are triggered after these updates only.</p> <ul style="list-style-type: none"> • When you update the Scheduled Start or Scheduled End fields of a service appointment, or when you update the Service Resource or Estimated Travel Time fields of an assigned resource associated with the service appointment. • When you update the Scheduled Start or Scheduled End fields of an absence, or when you update the Service Resource or Estimated Travel Time fields of an assigned resource associated with the absence. • When you unschedule or delete a service appointment, an assigned resource, or an absence.

SEE ALSO:

[Set Custom Permissions for Field Service](#)

[Check Rule Violations on the Gantt](#)

[Check Rule Violations on the Field Service Gantt](#)


Create and Manage Field 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.


Objective Type	Description
ASAP	<p>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.</p> <p> Tip: An ASAP objective can contradict other objectives. For example, scheduling an appointment as soon as possible</p>

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Objective Type	Description
	can result in more travel time. Weight your objectives accordingly.
Minimize Overtime	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.
Minimize Travel	<p>Measures the travel time required for a service appointment.</p> <p>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.</p> <p>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.</p> <ul style="list-style-type: none"> • 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. <p>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. This option isn't supported by Enhanced Scheduling and Optimization.</p>
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.
Same Site	Ensures that a minimal number of mobile workers visit the same location by having the optimization services group service appointments located at the same site. Use the Same Site service objective to prefer that jobs get scheduled together while considering all other objectives and KPIs.
Skill Level	<p>Measures assigned resources' adherence to a work order's skill requirements. When creating an objective of this type, select whether to favor the least- or most-qualified service resources:</p> <ul style="list-style-type: none"> • 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.

Objective Type	Description
Skill Preference	<p> Tip: Use this option with relevance groups to assign your most qualified resources only to work orders for high-priority accounts.</p> <p>If a work order has multiple skill requirements, the objective evaluates all skills and calculates an average score.</p> <p>Ranks candidates with a skill of a certain skill type that reflects the service appointment's skill preferences. For example, a service appointment requires a caregiver who speaks English or Spanish but the preferred choice is Spanish.</p>

SEE ALSO:

[Create and Manage Field Service Work Rules](#)

Optimize Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 priority settings:

- FSL Admin custom permission set

To optimize from the dispatcher console: One of these custom permission sets:

- FSL Admin Permissions
- FSL Dispatcher Permissions

Field Service supports only whole numbers such that decimal points are ignored when calculating priorities. For example, 3.94 is considered as 3. Any number above the priority range is considered as lowest priority.

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. If a service appointment in a lower priority is in a pinned status, other appointments aren't scheduled over this pinned appointment, and there's no overlap. Scheduling over a lower priority appointment isn't supported by Enhanced Scheduling and Optimization.

SEE ALSO:

[Schedule Appointments Using Priorities](#)

Create Relevance Groups

A relevance group in Field Service is a group of appointments or 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Work Rule
Maximum Travel from Home (Full-Time)

Related **Details**

Work Rule Name	Maximum Travel from Home (Full-Time)	Active	<input checked="" type="checkbox"/>
Description	Enforces our policy on maximum travel from home for full-time technicians.		
Maximum Travel From Home Type	Travel Time	Maximum Travel From Home	60.00
Last Modified By	Teresa Admin, 16/10/2018 20:46		

▼ Relevance Groups

Service Territory Member: All

Service Appointments: All

Save

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.

SEE ALSO:


[Work Rule Type: Count Rule](#)

[Create and Manage Field Service Work Rules](#)

Fix Overlaps by Using an Automated Scheduling Flow (Beta)


Tackle Field Service scheduling challenges with an automated flow that addresses and fixes schedule overlaps that occur due to an appointment ending late. Use the flow template recommendations or adjust the template to suit your specific use case.

 *This is a Field Service managed package feature.*

 **Note:** This feature is a Beta Service. A customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

If an appointment is taking longer than expected, the rest of the day is at risk. The Fix Schedule Overlaps flow is an [optimization](#) feature. It uses resource schedule optimization, which means that only the affected service resource's schedule is optimized. The optimization minimizes any changes to the schedule by leaving as many scheduled appointments as is. This flow replaces scheduling recipes and is available when using Enhanced Scheduling and Optimization.

1. In the Field Service Admin app, go to Field Service Settings.
2. Select **Scheduling** and then in the General Logic tab select **Enable the Fix Schedule Overlaps flow (Beta)**.
3. If you create a flow using the Fix Schedule Overlaps flow template, make sure to change the Fix Schedule Overlaps flow (Beta) API name field value to the new flow's API name.
4. From Setup, in the Quick Find box, enter *Process Automation*, and then select **Flows**.
5. Open the Fix Schedule Overlaps flow template.
6. To create your own version of the flow based on the template (recommended), click **Save As** and add the required details.
7. The flow is triggered only for in-day of service changes to address last-minute issues to an individual service resource's schedule due to late ending appointments. The minimum overlap for the flow to apply is 10 minutes. Use the flow as is, or modify it according to your needs. The flow template includes components.
 - Check if Overlap is Today component—Call an action that checks whether the overlap occurred today in the service resource's timezone. An overlap occurs due to unexpected changes in the schedule on the day of service.
 - Is Overlap Today component—Determine whether the overlap occurred today according to the Check if Overlap is Today result. If the overlap is today then continue with the flow.
 - Is Late End component—Determine whether the status of the service appointment that triggered the overlap is In Progress, Completed, or Cannot Complete resulting in a late end. If the service appointment ended late or is expected to end late then continue with the flow.
 - Is Overlap Long component—Determine whether the schedule overlap is considered long. If the schedule overlap is 10 minutes or longer then continue with the flow. You can adjust the minimum overlap length.
 - Get Scheduling Policy component—Filter the scheduling policy records to get the Customer First scheduling policy used when running the Fix Schedule Overlaps action. You can select a different scheduling policy according to your use case.
 - Fix Schedule Overlaps component—Fix the schedule when an overlap occurs because a service appointment ended late or is expected to end late. To keep the schedule as close as possible to the original schedule, the Fix Schedule Overlaps flow only considers service appointments that are scheduled to the resource for the day that the overlap occurs.
8. Save the flow.

 **Note:** To control user permissions to run flows, see [How Does Flow Security Work?](#)

EDITIONS


Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

 **Note:** Several fix overlaps features are available in Field Service.

- When you're scheduling service appointments on the Gantt, an appointment can overlap with another appointment or an absence. The [Fix Overlaps](#) feature in the managed package dynamic Gantt is used to reschedule overlapping appointments according to your configured settings. For example, when you can't find a valid schedule for an appointment, select to put the appointment in jeopardy, unschedule it, or reshuffle other assignments. This Fix Overlaps feature isn't supported by Enhanced Scheduling and Optimization.
- Don't confuse the dynamic Gantt Fix Overlaps option with the [Fix Overlaps](#) option in the scheduling policy. If Fix Overlaps is selected in the scheduling policy, service appointment overlaps are addressed during in-day or global optimization and overlaps with Resource Absences are ignored. When overlaps are being fixed, the overlapping appointments are unscheduled. If the optimization engine can't find a valid schedule for any appointments, these appointments remain unscheduled. If Fix Overlaps isn't selected, overlaps are left as is. When using Enhanced Scheduling and Optimization, overlaps are addressed regardless of the Fix Overlaps setting in the scheduling policy, such that this option isn't relevant.
- You can [create scheduling recipes](#) that address what happens to your schedule during resource schedule optimization due to appointment cancellations, time changes, and overlaps. Scheduling recipes aren't supported by Enhanced Scheduling and Optimization.
- The [Fix Schedule Overlaps flow \(Beta\)](#) replaces scheduling recipes when you're using Enhanced Scheduling and Optimization to resolve overlaps that occur when a mobile worker finishes an appointment late.

Considerations for the Fix Schedule Overlaps Flow

Before you start using the Fix Schedule Overlaps flow, make sure you review some considerations.

- The Fix Schedule Overlaps action triggers resource scheduling optimization. During this optimization, the engine optimizes service appointments that are schedulable (not in a pinned status). In Field Service Settings, in the Logic tab under Optimization, we recommend leaving the Dispatched status deselected for In-Day and Resource Schedule Optimization, so that dispatched work can be moved if a previous job runs late. During resource schedule optimization, service appointments aren't moved if the Dispatched status is selected.
- Appointments dropped due to fix overlaps aren't marked as In Jeopardy.
- If a service appointment ends late and creates an overlap with the next service appointment (not just an overlap with the travel time) whose start time is now in the past, the Fix Schedule Overlaps flow runs, but schedule overlaps aren't fixed.
- An autolaunched flow type doesn't require activation. The Enable the Fix Schedule Overlaps flow (Beta) setting in Field Service Settings is used to activate the Fix Schedule Overlaps flow. This setting is disabled by default.
- When you create a flow using the Fix Schedule Overlaps template, make sure to use a flow name that is different from the original flow name.

Create Scheduling Recipes for Common Events


Tackle common Field Service 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.

 *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. Scheduling recipes aren’t available when using Enhanced Scheduling and Optimization, which uses the Fix Schedule Overlaps automated flow instead.

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.

Initiating User Permission Set Value	Corresponding Permission Set
Resource	Field Service Resource
Dispatcher	Field Service Dispatcher Field Service Community Dispatcher
Agent	Field Service Agent
Admin	Field Service Admin
Community	Field Service Self Service

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 a scheduling recipe:

- Custom permission set: Field Service Admin Permissions

- A triggering service appointment is the appointment that actually triggers resource scheduling optimization. For Shortened Appointments, Late-End Overlap, and Emergency Overlap scenarios, scheduling recipes are only triggered if the triggering service appointment's status has been selected as a pinned status for In-Day Optimization. The optimization engine then optimizes service appointments that are schedulable (not in a pinned status). 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.

Scenario	Trigger Criteria	Expected Behavior (Result)
Canceled Appointment	<ul style="list-style-type: none"> • Status Category = Canceled • The service appointment is canceled on the day of service. • Service appointments must meet the set recipe criteria. 	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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). 	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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). 	<ul style="list-style-type: none"> • 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

Scenario	Trigger Criteria	Expected Behavior (Result)
	<ul style="list-style-type: none"> • Service appointments must meet the set recipe criteria. 	<p>appointment from the next 100 appointments scheduled for that resource.</p>
Emergency Overlap	<ul style="list-style-type: none"> • 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). 	<ul style="list-style-type: none"> • 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) Active

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. Preserve Current Schedule & Fill Gaps ▼

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. [Select Territories](#)

Work Types
Solar Panel Installation, Solar Panel Repair, Solar Panel Maintenance. [Select Work Types](#)

Status Categories ¹

Initiating User Permission Set ¹

Custom Criteria Logic

[+ Add](#)

Optimize with Scheduling Policy ¹

Actions to Take After Optimization

Change scheduled appointments' status ¹

Mark unscheduled appointments as In Jeopardy ¹

[Cancel](#) [Save](#)

Field Service Scheduling and Optimization Services

Scheduling and optimization includes services used to schedule, reschedule, and unschedule service appointments.

 *This is a Field Service managed package feature.*

Review the scheduling and optimization services available.

Feature	Description
Scheduling Services	
Book Appointments	Use Book Appointment to agree with your customer on a visiting time window, and ensure that automatic scheduling and optimization processes adhere to the agreed visiting times.
Drag and Drop, Schedule, Bulk Schedule	Schedule an appointment by dragging it from the appointment list, directly from the dispatcher console map, or from the service appointment mini view. Use the Mass Schedule action to bulk schedule appointments from the appointment list.
Emergency Wizard	Quickly schedule, dispatch, and track emergency work.
Get Candidates	Quickly find resources who are best-matched to work on an individual Service Appointment.
Optimization Services	
Auto Schedule	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.
Global Optimization	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.
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.
Reshuffle	Make space in a full schedule for a high-priority appointment. The Reshuffle action in the Gantt postpones lower-priority appointments. This feature isn't supported by Enhanced Scheduling and Optimization.

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer** Editions

Feature	Description
RSO	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.
Schedule Recipes	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.
Dynamic Gantt Services	
Fill-In Schedule	<p>Fill gaps in a service resource's schedule. This feature fills gaps in the service resource's schedule with non-urgent work that has no defined execution time, such as maintenance work.</p> <p>This feature isn't supported yet by Enhanced Scheduling and Optimization.</p>
Fix Overlaps	<p>If a service appointment overlaps with other appointments or absences, use the Fix Overlaps feature to harmoniously reschedule appointments.</p> <p>This feature isn't supported yet for capacity-based service resources.</p> <p>This feature isn't supported yet by Enhanced Scheduling and Optimization.</p>
Group Nearby	<p>Minimize travel time or gaps between appointments. This feature unschedules appointments that were scheduled later that day and replaces them with appointments that are close in location to the source appointment.</p> <p>This feature isn't supported yet by Enhanced Scheduling and Optimization.</p>
Transparency Services	
Appointment Insights	Help users understand why a service appointment can't be scheduled, and which work rules are preventing its scheduling. Discover what changes can be made to the scheduling policy's work rules to qualify time slots and candidates for scheduling.
Optimization Hub	View Optimization Hub to learn what improvements optimization made to the scheduling of service appointments across multiple territories and how to get the best results from optimization.

Reserve Time Slots for Designated Types of Work

Create specific time slots in Field Service 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. For example, you can designate a time slot to support only appointments whose **Emergency** field is selected.

[Set Up Designated Work for Time Slots When Using Enhanced Scheduling and Optimization](#)

Create specific time slots in Field Service dedicated to service appointments that meet your criteria when using Enhanced Scheduling and Optimization.

[Set Up Designated Work for Time Slots When Not Using Enhanced Scheduling and Optimization](#)

Create specific time slots in Field Service dedicated to service appointments that meet your criteria when not using Enhanced Scheduling and Optimization.

SEE ALSO:

[Work Rule Type: TimeSlot Designated Work](#)

[Field Service Guidelines for Shift Availability](#)

Set Up Designated Work for Time Slots When Using Enhanced Scheduling and Optimization

Create specific time slots in Field Service dedicated to service appointments that meet your criteria when using Enhanced Scheduling and Optimization.

1. 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.
2. Add recordset filter criteria columns to the lookup window.
 - a. From the object management settings for recordset filter criteria, go to Search Layouts and click **Edit** on the System Administrator profile.
 - b. Add Source Object, Filtered Object, and Active to the search layout.
 - c. Click **Save**.
3. Create a recordset filter criteria for designated work.
 - a. In the App Launcher, click **Recordset Filter Criteria**.
 - b. In the Recordset Filter Criteria list view, click **New**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

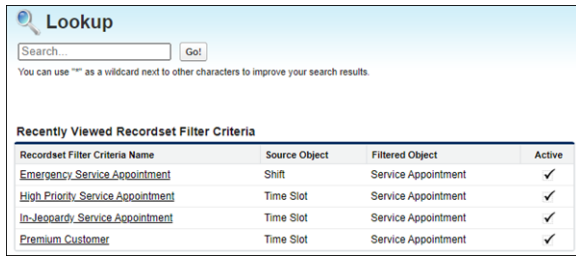
USER PERMISSIONS

To view, create, and update recordset filter criteria:

- View, create, and edit on Service Appointments, Time Slots, Operating Hours, Recordset Filter Criteria, and Recordset Filter Criteria Rules
- AND
- Delete on Recordset Filter Criteria Rules

- c. Enter a name and description for the criteria.
 - d. In the Source Object field, select **Time Slot**.
 - e. In the Filtered Object field, select **Service Appointment**.
 - f. Select **Active**.
 - g. In the Conditions section, select the relevant condition for when the recordset filter criteria is valid.
 - h. To add filter conditions, select the Criteria Field, the Operator, and the field Value to match on. The Value input changes depending on the field you select. For example, picklist fields show the list of available choices. Add another condition if you need to.
 - i. Save the recordset filter criteria.
4. Designate a time slot for service appointments of a specified type.
 - a. In the App Launcher, click **Operating Hours**.
 - b. In the Operating Hours list view, select an operating hours record.
 - c. From the Details tab, in the calendar editor, right-click a time slot and select **Enhanced Designated Work**.

- d. From the lookup window, select a recordset filter criteria.



Important: Select an active recordset filter criteria with the source object Time Slot and filtered object Service Appointment.


- e. Click **Save**.
- f. From the calendar editor, you can change a designation by selecting a different recordset filter criteria from the lookup window.
- g. You can delete a designation only from the Related tab. In the time slots related list, click **Edit** on the action menu of the relevant time slot. Then clear your selection from the Recordset Filter Criteria field and click **Save**.

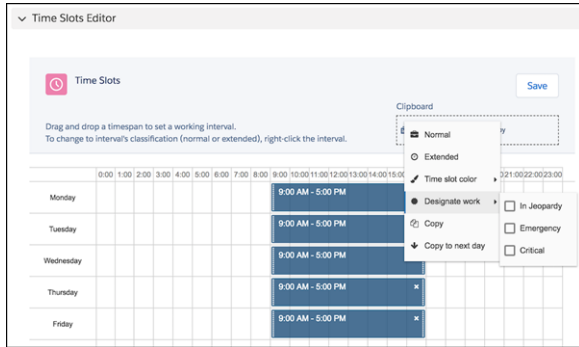
If an appointment doesn't meet the criteria of your designated time slot, the scheduling optimizer won't schedule it within the time slot.

Set Up Designated Work for Time Slots When Not Using Enhanced Scheduling and Optimization

Create specific time slots in Field Service dedicated to service appointments that meet your criteria when not using Enhanced Scheduling and Optimization.

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.

SEE ALSO:


- [Work Rule Type: TimeSlot Designated Work](#)
- [Create Work Types for Field Service](#)
- [Guidelines for Recordset Filter Criteria](#)

Enable Multiday Field 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.

 *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 **Scheduling > General Logic**.
3. In the `Multi-day service appointment field` field, select **Is MultiDay**.
4. In Setup, add the `Is MultiDay` field to your service appointment page layout and save your changes.
5. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets** under Users.
6. Click **Field Service Dispatcher Permissions**.
7. In the Apps section, click **Custom Permissions**.
8. Click **Edit**.
9. 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 use the Long-Term Gantt view:

- Longterm View custom permission

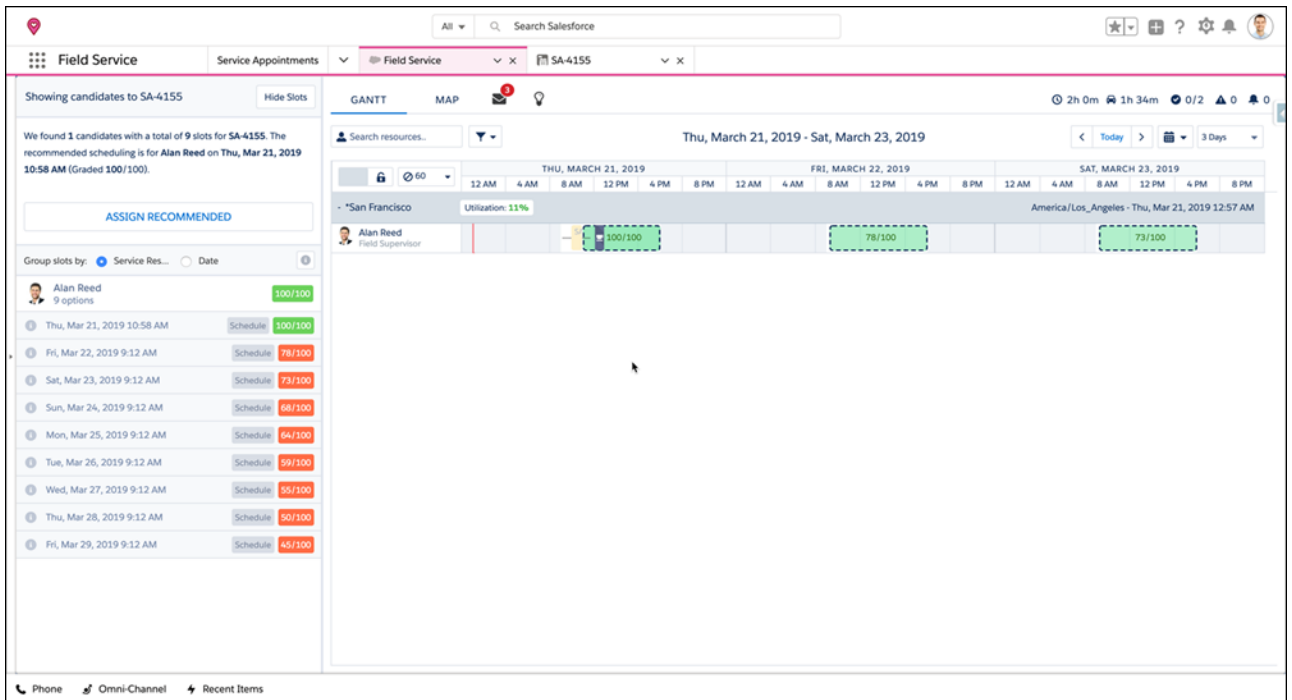
10. Click **Save**.

11. 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 screenshot displays the Salesforce Field Service Dispatcher Console interface. The top navigation bar includes 'Field Service', 'Service Appointments', and a search bar. The main area shows a Gantt chart for a multiday service appointment (SA-4155) spanning from Thursday, March 21, 2019, to Saturday, March 23, 2019. The Gantt chart shows the availability of Alan Reed, a Field Supervisor, across these days. The chart indicates that Alan Reed is the recommended resource for this appointment, with a utilization of 11%. The Gantt chart shows a 10-hour appointment on Thursday, March 21, 2019, at 10:58 AM, and a 78-hour appointment on Friday, March 22, 2019, at 9:12 AM. The Gantt chart also shows a 73-hour appointment on Saturday, March 23, 2019, at 9:12 AM. The Gantt chart shows that Alan Reed is available for the entire duration of the appointment.

The Dispatcher Console automatically takes your service resources' travel and break times into account to optimize your multiday appointments.

[Considerations for Multiday Scheduling](#)

Keep these considerations in mind when you implement multiday scheduling in your org.

SEE ALSO:

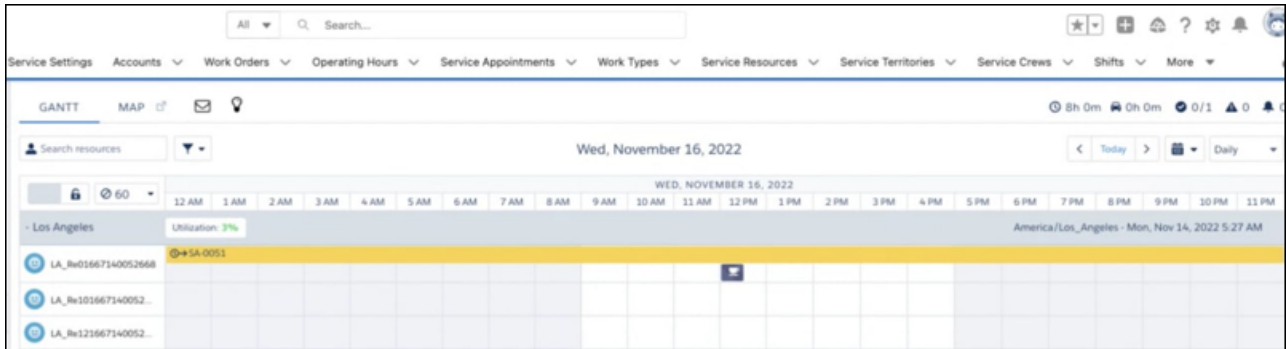
[Considerations and Limitations for Complex Work](#)

Considerations for Multiday Scheduling

Keep these considerations in mind when you implement multiday scheduling in your org.

 *This is a Field Service managed package feature.*

- Lunch breaks are shown on the Gantt as an overlap with the multiday service appointment when using Enhanced Scheduling and Optimization.



- Multiday scheduling is supported in all Enhanced Scheduling and Optimization services except Appointment Booking.
 - 📌 **Note:** Reshuffle isn't supported in Enhanced Scheduling and Optimization.
- On multiday service appointments, the Scheduled Start and End times must fall within the assigned resource's time slots in their operating hours.
- Multiday scheduling is based on the customer's operating hours only if the applied scheduling policy includes a [Service Appointment Visiting Hours work rule](#).
- Multiday work calculations are run when the assigned resource changes or the service appointment Duration, Scheduled Start, or geolocation changes. This behavior isn't supported when using Enhanced Scheduling and Optimization.
- If the Break Start and Break Duration fields are filled out on the Service Resource Availability work rule of the applied scheduling policy, the schedule includes breaks.
- If you drag and drop a multiday service appointment, or manually change its Scheduled Start, the appointment's Scheduled End isn't automatically extended beyond the due date. This means that the appointment can be manually moved beyond the Due Date, but its Duration remains unchanged.
- To prevent the scheduling optimizer from proposing time slots that don't fully respect resources' availability, configure a TimeSlot Designated Work work rule.
- Multiday scheduling assumes that the assigned resource begins and ends each day at their home base, so the daily schedule includes travel time to and from the site.
 - 💡 **Tip:** To change the travel time logic, update the Travel From Home and Travel To Home fields on the Service Resource Availability work rule. These fields let you allocate a number of minutes at the day's start and end for the resource's travel at their own expense. If they're left blank, the schedule automatically includes calculated travel time. For example, enter 60 in each field if resources must be present at the site at the start of the day. This way, the schedule doesn't include travel time for resources whose home base is less than an hour from the site.
- Multiday scheduling has these additional 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 eight weeks.
 - The combination of multiday scheduling and complex work isn't supported. If a multiday service appointment has a [scheduling dependency](#), its Scheduled End date isn't calculated when the appointment is scheduled.

- When not using Enhanced Scheduling and Optimization, you can only schedule one multiday service appointment at a time.

SEE ALSO:

[Complex Work in Field Service](#)

[Field Service Limits and Limitations](#)

Manage Work Capacity in Field Service


Control the work performed by your workforce according to dynamic company priorities.

Work capacity limits let you control the amount of work you can schedule for service resources. Limiting work capacity enables capacity reservation based on dynamic company priorities. Using capacity reservation can also help your company comply with its SLA, for example, by ensuring that maintenance tasks are performed regularly and not concentrated in one calendar period. Seeing as some work is seasonal, you might want to focus in the summer months on new installs and limit maintenance work to increase revenue. Or, during a recall or mandatory repairs when limit new installations to make more room for break-fix or maintenance type of work.

Limiting work capacity is done by adding thresholds that limit how many hours or what percentage of the total work capacity you can schedule for a specific value of a service appointment attribute field in a service territory. The work on service appointments with a specific value of a service appointment attribute field is referred to as a workstream.

Limits define the maximum hours of schedulable capacity for a specific workstream. For example, you can limit the total duration of new installation jobs scheduled in the New York territory to 100 hours per day during weekdays for the next two months. You can also limit maintenance jobs to 50 hours per day on Mondays. Or set the limit as a percentage of the total calculated available work capacity. For example, limit the installation jobs in Miami to 15% of the total calculated available time in Miami per day during the same time period. The limits are defined per day. Restrict limits to a date range or start on a specific date and be open-ended.

You can set a limit to the work capacity for a specific workstream. A workstream with a defined limit is called a limited workstream. For example, limiting the work capacity of service appointments for the Breakfix work type to 140 hours on a specific day in Los Angeles defines a limited Breakfix workstream. Use out-of-the-box service appointment attributes to define these limits or create custom attributes. For example, use work type categories.

 **Important:** This feature is available only with Enhanced Scheduling and Optimization.

[Set Up Field Service Work Capacity](#)

Before you create work capacity limits, set up Work Capacity in Field Service. You can define a relaxation policy for the work capacity limit and allow work to be scheduled, even when the limit set for that day was exceeded. You can also enable automatically sharing the work capacity object records (Work Capacity Limit, Work Capacity Availability, and Work Capacity Usage) with users according to the service territories they're permitted to access.

[Work Capacity Limits \(WCL\)](#)

Capacity limits are defined per service territory, for a certain time resolution, and over a given open or closed-end date range. A limit is also restricted to a specific workstream that supports your company's business objectives.

[Work Capacity Usage \(WCU\)](#)

When a work capacity limit (WCL) is activated, Work Capacity Usage (WCU) records with the same criteria are created for each day that has scheduled service appointments within the WCL time range. The time consumed for each WCU aggregates the total scheduled hours of service appointments that conform to the limit criteria that belong to a specific work stream.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

[Work Capacity Availability Calculations](#)

Work capacity availability calculations enable setting limits on work capacity as a percentage of the total work capacity.

[Monitoring Workstream Usage in Summary View](#)

The Summary view provides a comprehensive visual display of the consumption relative to the defined limit in hours or percentage for all limited workstreams in selected territories for a specific day or week.

[View Workforce Availability in the Work Capacity Dashboard](#)

The dashboard includes two reports related to work capacity availability.

[Work Capacity Considerations and Limitations](#)

When you set up work capacity, keep these considerations and limitations in mind.

Set Up Field Service Work Capacity

Before you create work capacity limits, set up Work Capacity in Field Service. You can define a relaxation policy for the work capacity limit and allow work to be scheduled, even when the limit set for that day was exceeded. You can also enable automatically sharing the work capacity object records (Work Capacity Limit, Work Capacity Availability, and Work Capacity Usage) with users according to the service territories they're permitted to access.

1. From Setup, in the Quick Find box, enter *Field Service Settings*, and then select **Field Service Settings**.
2. Select **Allow defining work capacity limits**.
3. From Setup, in the Quick Find box, enter *Users Profiles*, and then select **Profiles**.
4. Make sure the tab is set to Default On for:
 - Work Capacity Limits
 - Work Capacity Usages
 - Work Capacity Availabilities
5. If your service appointments have custom fields, give read and edit access to the fields.
 - a. From Setup, in the Quick Find box, enter *Users*, and then select **Permission Sets**.
 - b. For the Field Service Integration permission set, click **Object Settings** and select **Service Appointments**.
 - c. For each custom field, select **Read Access** and **Edit Access**.
6. Make sure all permission sets are current.
 - a. From the App Launcher, find and select the **Field Service Admin** app.
 - b. Click **Field Service Settings**, select **Getting Started**, and then click the **Permission Sets** tab.
 - c. If the permission set tile indicates that it's not current, click **Update Permissions**.
7. Make sure that a default scheduling policy is selected for the Dispatcher Console UI.
 - a. From the App Launcher, find and select the **Field Service Admin** app.
 - b. Click **Field Service Settings**, select **Dispatcher Console UI**, and in the Gantt Configurations tab check that a default scheduling policy is selected.
8. To let dispatchers update service appointments, share the work capacity object records with users according to the service territories they're permitted to access.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To set up Work Capacity:

- Admin on Field Service

- a. From the App Launcher, find and select the **Field Service Admin** app.
- b. From the Field Service Settings, select **Sharing**.
- c. On the Scheduled Jobs tab, make sure that **Enable user territory sharing** and **Enable automatic population of user groups based on User Territory** are selected.
- d. Select **Share all work capacity records with public groups associated with the service territory**.
- e. Define triggers for capturing new work capacity object records.

From Setup, go to the Developer Console. Create an Apex trigger for the WorkCapacityAvailability object and name it *TR0060_Work_Capacity_Availability_After_Insert*. Copy and paste the code block's content provided in [Work Capacity Sharing Triggers](#) to the Apex trigger tab and save the new trigger. Create an Apex trigger for the WorkCapacityLimit object, and name it *TR0061_Work_Capacity_Limit_After_Insert*. Create a trigger for the WorkCapacityUsage object, and name it *TR0062_Work_Capacity_Usage_After_Insert*.

9. (Optional) Enable relaxation of the work capacity limits.

- a. From the App Launcher, find and select the **Field Service Admin** app.
- b. From the Field Service settings, select **Scheduling**.
- c. On the Work Capacity tab, select the relaxation policy.

If you select to set a work capacity limit relaxation policy per limit, users can relax a limit up to a week before or up to one day after midnight on the day of service.

[Work Capacity Sharing Triggers](#)

Work capacity triggers allow work capacity objects to be available for all relevant users, depending on their access to the service territory.

[Apply the Work Capacity Rule to Scheduling Policies](#)

You can enforce work capacity limits by adding the Work Capacity work rule to policies. If the work rule is applied to the policy, and the work capacity limit is exceeded, Field Service doesn't schedule a service appointment or return a slot in appointment booking.

SEE ALSO:

[Enable Field Service](#)

[Work Capacity Considerations and Limitations](#)

[Work Capacity Sharing Triggers](#)

Work Capacity Sharing Triggers

Work capacity triggers allow work capacity objects to be available for all relevant users, depending on their access to the service territory.

Share WorkCapacityAvailability Trigger

Define the TR0060_Work_Capacity_Availability_After_Insert trigger for capturing newly created WorkCapacityAvailability object records.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

```
trigger TR0060_Work_Capacity_Availability_After_Insert on WorkCapacityAvailability (after
insert) {
    Map<Id, Id> sharingMap = new Map<Id, Id>();
    Set<Id> serviceTerritoryIds = new Set<Id>();
    Map<String, Id> groupNameToIdMap = new Map<String, Id>();
    for (WorkCapacityAvailability record : Trigger.new) {
        serviceTerritoryIds.add(record.ServiceTerritoryId);
    }
    List<ServiceTerritory> serviceTerritories = [SELECT Id, Name FROM ServiceTerritory
WHERE Id IN :serviceTerritoryIds];
    Map<Id, String> serviceTerritoryNameMap = new Map<Id, String>();
    for (ServiceTerritory territory : serviceTerritories) {
        serviceTerritoryNameMap.put(territory.Id, territory.Name);
    }
    for (Group groupData : [SELECT Id, Name FROM Group WHERE Name IN
:serviceTerritoryNameMap.values()]) {
        groupNameToIdMap.put(groupData.Name, groupData.Id);
    }
    for (WorkCapacityAvailability record : Trigger.new) {
        String serviceTerritoryName = serviceTerritoryNameMap.get(record.ServiceTerritoryId);

        Id groupId = groupNameToIdMap.get(serviceTerritoryName);
        if (groupId != null) {
            sharingMap.put(record.Id, groupId);
        }
    }
    System.debug('Adding WorkCapacityAvailabilityShare record from trigger
TR0060_Work_Capacity_Availability_After_Insert');
    List<WorkCapacityAvailabilityShare> recordsToUpsert = new
List<WorkCapacityAvailabilityShare>();
    for (Id recordId : sharingMap.keySet()) {
        WorkCapacityAvailabilityShare newRecord = new WorkCapacityAvailabilityShare();
        newRecord.ParentId = recordId;
        newRecord.UserOrGroupId = sharingMap.get(recordId);
        newRecord.AccessLevel = 'Edit';
        recordsToUpsert.add(newRecord);
    }
}
```

```

}
upsert recordsToUpsert;

```

Share WorkCapacityLimit Trigger

Define the TR0061_Work_Capacity_Limit_After_Insert trigger for capturing newly created WorkCapacityLimit object records.

```

trigger TR0061_Work_Capacity_Limit_After_Insert on WorkCapacityLimit (after insert) {
    Map<Id, Id> sharingMap = new Map<Id, Id>();
    Set<Id> serviceTerritoryIds = new Set<Id>();
    Map<String, Id> groupNameToIdMap = new Map<String, Id>();
    for (WorkCapacityLimit record : Trigger.new) {
        serviceTerritoryIds.add(record.ServiceTerritoryId);
    }
    List<ServiceTerritory> serviceTerritories = [SELECT Id, Name FROM ServiceTerritory
WHERE Id IN :serviceTerritoryIds];
    Map<Id, String> serviceTerritoryNameMap = new Map<Id, String>();
    for (ServiceTerritory territory : serviceTerritories) {
        serviceTerritoryNameMap.put(territory.Id, territory.Name);
    }
    for (Group groupData : [SELECT Id, Name FROM Group WHERE Name IN
:serviceTerritoryNameMap.values()]) {
        groupNameToIdMap.put(groupData.Name, groupData.Id);
    }
    for (WorkCapacityLimit record : Trigger.new) {
        String serviceTerritoryName = serviceTerritoryNameMap.get(record.ServiceTerritoryId);

        Id groupId = groupNameToIdMap.get(serviceTerritoryName);
        if (groupId != null) {
            sharingMap.put(record.Id, groupId);
        }
    }
    System.debug('Adding WorkCapacityLimitShare record from trigger
TR0061_Work_Capacity_Limit_After_Insert');
    List<WorkCapacityLimitShare> recordsToUpsert = new List<WorkCapacityLimitShare>();
    for (Id recordId : sharingMap.keySet()) {
        WorkCapacityLimitShare newRecord = new WorkCapacityLimitShare();
        newRecord.ParentId = recordId;
        newRecord.UserOrGroupId = sharingMap.get(recordId);
        newRecord.AccessLevel = 'Edit';
        recordsToUpsert.add(newRecord);
    }
    upsert recordsToUpsert;
}

```

Share WorkCapacityUsage Trigger

Define the TR0062_Work_Capacity_Usage_After_Insert trigger for capturing newly created WorkCapacityUsage object records.

```

trigger TR0062_Work_Capacity_Usage_After_Insert on WorkCapacityUsage (after insert) {
    Map<Id, Id> sharingMap = new Map<Id, Id>();
    Set<Id> serviceTerritoryIds = new Set<Id>();
    Map<String, Id> groupNameToIdMap = new Map<String, Id>();
    for (WorkCapacityUsage record : Trigger.new) {

```

```

        serviceTerritoryIds.add(record.ServiceTerritoryId);
    }
    List<ServiceTerritory> serviceTerritories = [SELECT Id, Name FROM ServiceTerritory
WHERE Id IN :serviceTerritoryIds];
    Map<Id, String> serviceTerritoryNameMap = new Map<Id, String>();
    for (ServiceTerritory territory : serviceTerritories) {
        serviceTerritoryNameMap.put(territory.Id, territory.Name);
    }
    for (Group groupData : [SELECT Id, Name FROM Group WHERE Name IN
:serviceTerritoryNameMap.values()]) {
        groupNameToIdMap.put(groupData.Name, groupData.Id);
    }
    for (WorkCapacityUsage record : Trigger.new) {
        String serviceTerritoryName = serviceTerritoryNameMap.get(record.ServiceTerritoryId);

        Id groupId = groupNameToIdMap.get(serviceTerritoryName);
        if (groupId != null) {
            sharingMap.put(record.Id, groupId);
        }
    }
    System.debug('Adding WorkCapacityUsageShare record from trigger
TR0062_Work_Capacity_Usage_After_Insert');
    List<WorkCapacityUsageShare> recordsToUpsert = new List<WorkCapacityUsageShare>();
    for (Id recordId : sharingMap.keySet()) {
        WorkCapacityUsageShare newRecord = new WorkCapacityUsageShare();
        newRecord.ParentId = recordId;
        newRecord.UserOrGroupId = sharingMap.get(recordId);
        newRecord.AccessLevel = 'Edit';
        recordsToUpsert.add(newRecord);
    }
    upsert recordsToUpsert;
}

```

SEE ALSO:

[Define Apex Triggers](#)

[Set Up Field Service Work Capacity Limits](#)


Apply the Work Capacity Rule to Scheduling Policies

You can enforce work capacity limits by adding the Work Capacity work rule to policies. If the work rule is applied to the policy, and the work capacity limit is exceeded, Field Service doesn't schedule a service appointment or return a slot in appointment booking.

1. From **Setup**, in the **Quick Find** box, enter *Object Manager*, and then select **Work Rules**.
2. Click **New**.
3. Select **Field Service - Work Capacity Rule**, and then click **Next**.
4. Enter a name for the work rule and optionally a description.
5. Save the work rule.

You can add the work rule to any scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.

You can add only one Work Capacity rule to a scheduling policy.

 **Note:** If the work rule isn't added to the policy, after activating a work capacity limit, you can see the work capacity usage and compare it to the limit, but the limit isn't enforced.

SEE ALSO:

[Work Rule Type: Work Capacity](#)

Work Capacity Limits (WCL)

Capacity limits are defined per service territory, for a certain time resolution, and over a given open or closed-end date range. A limit is also restricted to a specific workstream that supports your company's business objectives.

The limit can define the maximum number of hours or the percentage of the available work capacity you can schedule for a specific workstream. For example, set a limit of 60 hours for installation work type in Los Angeles on August 25, 2023, or limit installation work to 50% of the available work capacity in New York every Monday in August 2023.

However, you can set limits only according to a unique service appointment attribute. Therefore, after you create a WCL with an attribute, any other WCL you create can have only that same attribute, with, optionally, a different attribute value. For example, if you create a WCL with the Work Type attribute and the Break Fix value, you can create WCLs only with the same or different value of the Work Type attribute (for example, Maintenance).

Work capacity limits are enforced by the Capacity Limit work rule type. To provide some scheduling flexibility, relax the limit on or close to the day of service, defined according to the time zone of the service appointment's service territory, in Field Service Settings. This relaxation enables scheduling a service appointment, even if it violates the set limit. For example, a service appointment needs to be scheduled for this Wednesday but can't be scheduled because the work capacity limit was reached. If the relaxation policy was set to start relaxation two days before the day of service, the service appointment can be scheduled for Wednesday starting midnight between Monday and Tuesday.

When you create a WCL, it's created as inactive and ignored by the scheduling optimization process. Activate the WCL to consider it in the schedule optimization.

When you activate a WCL, daily work capacity usage records are created for the relevant days in the time range. The work hours of service appointments scheduled for each date are filtered according to the workstream defined for the WCL. They're then accumulated as time consumed in the relevant work capacity usage (WCU) for this date.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To apply the Work Capacity rule:

- Create on Work Rules

EDITIONS

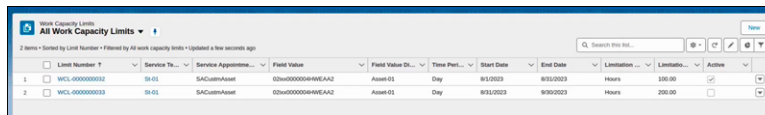
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Two WCLs, one open-ended and one close-ended, can include the same date. However, each date can have only one WCU. In this case, the WCU is created according to the close-ended WCL. Create a close-ended time range limitation to override an open-ended WCL. For example, if you have an open-ended limitation of 100 hours on installation work type on Mondays, and a nonworking holiday occurs on a Monday, create a close-ended WCL for this day and set the limitation to 0.

The Work Capacity Limits list view presents a tabular view of the WCLs defined, their definitions, and whether they're active. It also enables activating and deactivating a WCL.

To show the Work Capacity Limits list view, from the App Launcher, find and select **Work Capacity Limits**.



Limit Number	Service Te...	Service Appointme...	Field Value	Field Value De...	Time Peri...	Start Date	End Date	Limitation	Limitation...	Active
1	SI-01	SACustomAsset	02ba000000HWEEA2	Asset-01	Day	9/1/2023	9/31/2023	Hours	100.00	<input checked="" type="checkbox"/>
2	SI-01	SACustomAsset	02ba000000HWEEA2	Asset-01	Day	9/1/2023	9/30/2023	Hours	200.00	<input type="checkbox"/>

Create a Work Capacity Limit

Work capacity limits let you control the amount of work scheduled for service resources according to specific values of a service appointment's attribute (workstream). Work capacity limits are defined per service territory, for a certain time resolution, and over a given open or closed-end date range. After you create a work capacity limit, you can edit its description, limitation value, start and end dates, and days of the week. You can edit WCLs only if they're inactive. You can also edit the limit for a specific date by editing the work capacity usage object. Editing the daily limit doesn't change the limit value in the work capacity limit object.

Create a Work Capacity Limit

Work capacity limits let you control the amount of work scheduled for service resources according to specific values of a service appointment's attribute (workstream). Work capacity limits are defined per service territory, for a certain time resolution, and over a given open or closed-end date range. After you create a work capacity limit, you can edit its description, limitation value, start and end dates, and days of the week. You can edit WCLs only if they're inactive. You can also edit the limit for a specific date by editing the work capacity usage object. Editing the daily limit doesn't change the limit value in the work capacity limit object.

1. From the App Launcher, find and select **Work Capacity Limits**.
2. From the Work Capacity Limit list view, click **New**. The Limit Number is added automatically.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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, edit, or delete a Work Capacity Limit:

- Create, Update, or Delete on the Work Capacity Limits object

3. Select the service territory.
4. From the **Service Appointment Field**, select the field that represents the attribute you want to use for limiting capacity. The service appointment field is set the first time a work capacity limit is created for an organization. If you select another service appointment field you get an error. The data types supported for service appointment fields are int, string, double, checkbox, picklist, and boolean.
5. In **Field Value**, enter the value of the service appointment field. For example, for the **Work Type** attribute, enter *Maintenance*.
6. Enter the scheduling information:
 - Time period
 - Limitation units: Hours or Percentage
 - Limitation value in whole numbers
 - Start date
 - (Optional) End date
 Close-ended time ranges take precedence over overlapping open-ended time ranges when you're limiting work.
7. Select the days of the week to which the limitation applies. Select at least one day.
8. If Field Service settings were configured to allow a per-limit relaxation policy, enter a value for Relaxation Policy.
 - Leave empty for no relaxation.
 - Enter 0 for the relaxation to start at midnight on the day of service.
 - Enter a positive integer to set the relaxation to start this number of hours after midnight on the day of service (maximum 23 hours).

- Enter a negative integer to set the relaxation to start this number of hours before midnight on the day of service (maximum 336 hours, 14 days).

9. Save the new work capacity limit.

10. (Optional) To activate the work capacity limit, on the Work Capacity Limit list view, click **Edit**, and select **Active**.

You can also activate it directly from the Work Capacity Limit list view.

Work Capacity Usage (WCU)

When a work capacity limit (WCL) is activated, Work Capacity Usage (WCU) records with the same criteria are created for each day that has scheduled service appointments within the WCL time range. The time consumed for each WCU aggregates the total scheduled hours of service appointments that conform to the limit criteria that belong to a specific work stream.

WCU records are updated in real time. When a relevant service appointment is scheduled, rescheduled, or changed in a way that affects its relevance to the limit, the WCU record is updated.

When you deactivate or delete a WCL, all WCU records related to future dates are deleted.

To show the Work Capacity Usages list view, from the App Launcher, find and select **Work Capacity Usages**.

The Work Capacity Usages list view includes the currently active WCLs. It shows the service appointment limit criteria and the time consumed in hours and minutes. If **Average Travel Time** (in minutes) is defined for the service territory, consumption includes travel time.

This view lets you compare the planned limit versus actual scheduled consumption per service territory, day, and type of work. You can change the limit value of the associated WCL. However, this view is read-only. To change a limit, edit the WCL itself.

Usage Number	Service Territory	Service Appointment	Field Value	Time Period	Start Date	End Date	Available	Limitation	Time Consumed
1	02u000000000001	SACustomAsset	02u000000000001	Asset-01	8/2/2023	8/2/2023	-1.00	-1.00	100:00
2	WCU-0000000002	SACustomAsset	02u000000000002	Asset-01	8/3/2023	8/3/2023	-1.00	-1.00	100:00
3	WCU-0000000003	SACustomAsset	02u000000000003	Asset-01	8/4/2023	8/4/2023	-1.00	-1.00	100:00

Work Capacity Availability Calculations

Work capacity availability calculations enable setting limits on work capacity as a percentage of the total work capacity.

Work Capacity Availability (WCA) represents the availability in service territories that have a work capacity limit, for each day in the defined time horizon.

Let's assume three workstreams in New York on August 14 and a total availability of 400 hours. You can set the limit as 25% for the breakfix work type, 10% for the installs work type, and 50% for the maintenance work type. You can then keep the business considerations indicated by these percentages if the total availability decreases to 300 hours.

The work capacity availability is calculated periodically at scheduled times, for example, daily at a certain time. In addition, specific events trigger an automatic recalculation.

- Service territory membership changes (for example, a service resource was moved in or out of a relevant service territory)
- Service resource absences changes (for example, a service resource added or removed an absence)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- Shifts changes (for example, adding or removing a shift).

This recalculation keeps the work capacity availability for the service territory within the defined time horizon up to date.

The availability for a regular service resource is calculated using this equation: (Normal Hours + Overtime Hours - Absences - Breaks).

- Normal Hours: Hours in time slots of type Normal in the service resource's operating hours and confirmed shifts minus holiday hours(optional)
- Overtime Hours: Hours in time slots of type Extended in the service resource's operating hours
- Absences: Hours of the service resource approved absences
- Breaks: Hours of the service resource absences of type Break. For breaks of the Lunch Break type, the duration is added based on the default scheduling policy set for the Dispatcher Console UI in Field Service Settings.

The total availability on a specific day for a service territory is composed of:

- The availability of all service resources where the service territory is the primary or secondary territory.
- The hours per time period of capacity-based resources belonging to the service territory.
- The operating hours of an active crew belonging to the service territory are added as one resource. The operating hours of service resources that are allocated to a crew are excluded from the calculation.

When work capacity availability calculations are enabled, a Work Capacity Availability record is created for service territories with defined work capacity limits for each day in the configured time horizon.

To show the Work Capacity Availabilities list view, from the App Launcher, find and select **Work Capacity Availabilities**.

The list view shows the daily availability in minutes and in hours for all service territories that have defined limits in the time horizon (the default is 30 days). For example, if WCLs exist for New York and Miami, 60 availability records are shown.

Availability Number	Service Territory	Time Period	Start Date	End Date	Available Capacity (in ...)	Available Capacity (in ...)
1 WCA-0000000005	Los Angeles	Day	6/30/2023	6/30/2023	1,620.00	27.00
2 WCA-0000000006	Los Angeles	Day	6/29/2023	6/29/2023	1,620.00	27.00
3 WCA-0000000007	Los Angeles	Day	6/28/2023	6/28/2023	1,620.00	27.00
4 WCA-0000000008	Los Angeles	Day	6/27/2023	6/27/2023	1,620.00	27.00
5 WCA-0000000010	Los Angeles	Day	7/2/2023	7/2/2023	0.00	0.00
6 WCA-0000000011	Los Angeles	Day	7/1/2023	7/1/2023	1,620.00	27.00

[Set Up Availability Calculations in Field Service Settings](#)

Configure the availability calculations.

[Set Up Availability Calculations in the Field Service Admin App](#)

When setting up work capacity availability calculations, you must enable the availability calculations job.

Set Up Availability Calculations in Field Service Settings

Configure the availability calculations.

1. Make sure that all capacity limit remote sites are active.
 - a. From Setup, in the Quick Find box, enter *Field Service Settings*, and then select **Remote Site Settings**.
A list of all registered remote sites is shown.
 - b. Make sure all remote sites whose name starts with FSL CapacityLimit are active.
2. From Setup, in the Quick Find box, enter *Field Service Settings*, and then select **Field Service Settings**.
3. Under **Availability Considerations**:

USER PERMISSIONS

To set up Work Capacity Availability:

- Admin on Field Service

- a. To always include overtime as available time, select **Include Overtime**.
- b. Choose whether to include only primary members or both primary and secondary members of the service territory. If you consider secondary members, their time isn't exclusively available for the selected service territory.

Set Up Availability Calculations in the Field Service Admin App

When setting up work capacity availability calculations, you must enable the availability calculations job.

By default, the job runs on weekdays at 10:00 AM for 30 days ahead. You can schedule the availability calculation process to run during your low-activity times. You can also determine how many days ahead to calculate availability for.

1. From the App Launcher, find and select **Field Service Settings**.
2. Click **Scheduling**, and then click **Work Capacity**.

3. Enable the calculation process (1).
4. Select the days of the week and time to perform the availability calculations. The default is weekdays at 10:00 PM.
5. Click **Apply**.
6. Enter the number of days ahead to calculate availability for (the maximum is 90 days).
7. Save your changes.

Monitoring Workstream Usage in Summary View

The Summary view provides a comprehensive visual display of the consumption relative to the defined limit in hours or percentage for all limited workstreams in selected territories for a specific day or week.

The view provides a summary of the Work Capacity consumption relative to the limits of workstreams for which limitations exist in selected service territories at specific dates in hours and percentage. It also shows the total work capacity availability for the service territories on the selected dates.

USER PERMISSIONS

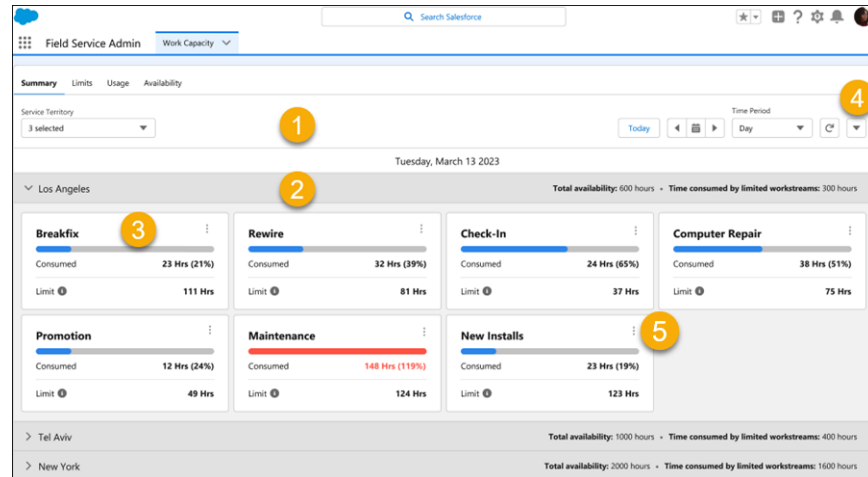
To set up Work Capacity Availability:

- Admin on Field Service

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



To access the Summary view, from the App Launcher, find and select **Work Capacity**, and then select the **Summary** tab.

The Actions menu (4) provides direct access to:

- The Field Service Work Capacity Dashboard.
- Creating a work capacity limit. If you add a work capacity limit, refresh the view to show the new workstream card.

In the first panel (1):

- Select the service territories that have active work capacity limits you want to show in the Summary view. You can select only your service territories or service territories shared with you.
- Select the date.
- Select the display period: Day view or Week view (for a 7-day period starting at the selected date).

The second panel (2) provides a Work Capacity summary for each selected service territory for the selected time period.

Total availability:

All available resource hours for the service territory on the specific date (including idle time and scheduled time). The system admin can configure available hours to include overtime.

Time consumed by limited workstream:

The hours consumed by the workstreams that have work capacity limitations in a specific time period.

The third panel (3) changes according to the selected time period.

In the Day view, the panel includes cards for all workstreams with a limit defined for this day (for example, the Work Type attribute with the breakfix value.). Each card includes a progress bar that visualizes the consumption of the limit on the workstream. When consumption exceeds 100% (for example, due to manual scheduling), the bar changes to red. It also includes these values:

Consumed:

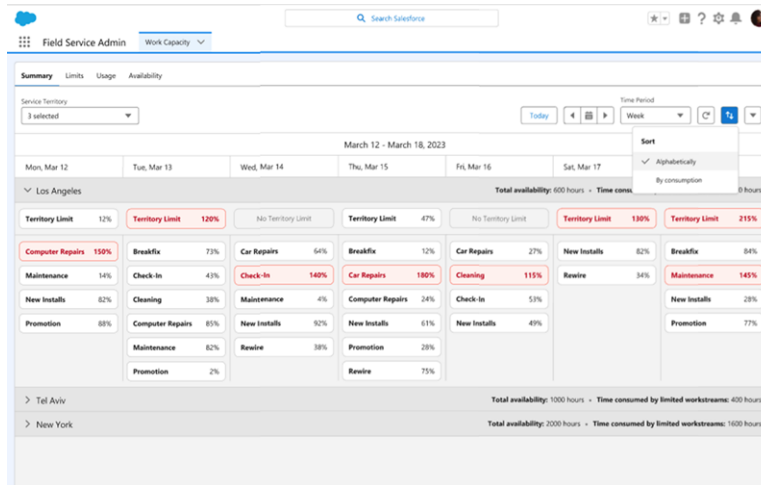
The number of hours consumed by this workstream and the percentage of time consumed relative to the limit.

Limit:

The limit set for the workstream in percentage of availability or in hours. If the limitation unit was set to hours, an infobubble shows the calculated percentage from the total availability. If the limitation unit is Percentage, the infobubble shows the calculated hours.

If service appointments are scheduled for the day, the Actions menu in the card (5) enables you to directly update the daily work capacity limit for a workstream by updating the Work Capacity Usage record without changing the Work Capacity Limit object. Other daily instances of the limit aren't affected. When you select the Edit Daily Limit action, the Edit Daily Limit dialog is shown, enabling you to type a new limitation value in the limitation unit of the defined limit (hours or percentage). You can't update relaxed limits or limits that aren't enforced. If the Work Capacity Limit object is subsequently updated, updating the WCL overrides the change you made.

In the Week view, the panel shows a list of the limited workstream for each day and the workstream consumption as a percentage of the limit for that day. You can sort the workstreams with limits valid for each day of the week alphabetically or in descending order according to the current consumption in percentage of the availability. For example, let’s assume a daily limit of 100 hours for installation work next week and a 200-hour limit for breakfixes. The alphabetically sorted weekly view can alert the planner if only 20 hours are consumed for installations while breakfixes have reached the 200 hours limit, preventing additional breakfixes from being scheduled. The planner can then decrease the limit for installations and increase the limit for breakfixes to ensure better resource utilization.



View Workforce Availability in the Work Capacity Dashboard

The dashboard includes two reports related to work capacity availability.

Total Availability by Day

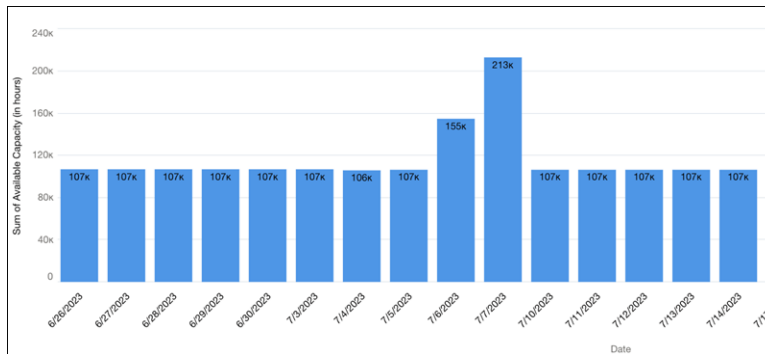
Use the report to:

- See how many available hours your workforce has each day in all service territories.
- Identify trends and seasonal behavior by analyzing historical availability.
- Ensure your workforce has the required work capacity by using future predictions.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

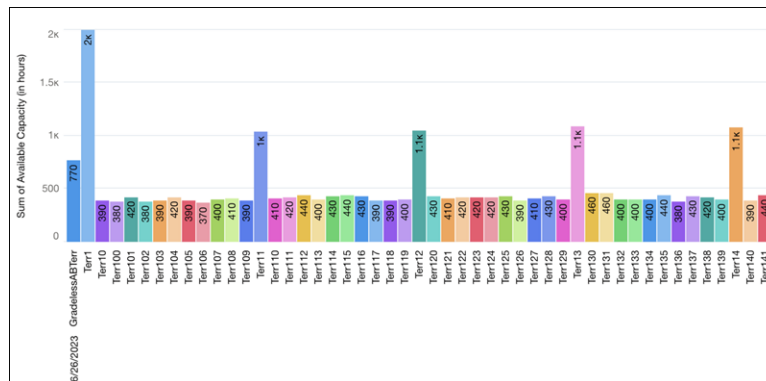
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.



Availability by Service Territory

Use the report to:

- See how many available hours your workforce has in each service territory on specific dates.
- Compare the workforce availability across different Service Territories.



SEE ALSO:

[Build a Dashboard](#)

Work Capacity Considerations and Limitations

When you set up work capacity, keep these considerations and limitations in mind.

Considerations

- To let dispatchers update service appointments, share the work capacity object records with users according to the service territories they're permitted to access.
- You can set work capacity limits (WCLs) only according to a unique service appointment attribute, optionally with different attribute values. For example, if you create a work capacity limit with the Work Type attribute and the Breakfix value, you can only create additional limits with the Work Type attribute and the Break Fix value or a different value of the Work Type attribute (for example, Maintenance).
- Only these service appointment field types are supported: Number, Text, Checkbox, Picklist, Lookup.
- When a lookup attribute value of a derived service appointment changes as a result of a change in the service appointment's parent entity, the relevant consumption instance isn't updated.
- Concurrent WCL activation and service appointment updates can cause consumption miscalculations. Activate WCLs during times when fewer service appointment updates occur.
- The travel time calculated for an overnight service appointment is added to consumption the day the service appointment starts.
- Days with zero consumption are shown only if the consumption was previously calculated to be nonzero.

Limitations

- Consumption calculation doesn't support these features:
 - Multiday work.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- Service appointments longer than 24 hours.
- When Allow definition of work capacity limits is turned off in the admin settings, WCL and WCU data is still saved in Field Service but isn't accessible to users. To maintain data integrity, disable all active WCLs before turning off this setting, and enable them after the setting is turned on.
- Records of work capacity usage are limited to 2,500 per day.
- If you define the work capacity limit by percentage but the availability can't be calculated (for example, because of a long time horizon), the limit in hours can't be calculated and isn't shown in the Summary view. Because the services (for example, appointment booking) use the hours limit, the limit can't be enforced.
- The Limit, Usage, and Availability tabs accessed from Work Capacity via the Work Capacity tab show only 30 records and can't be filtered or searched. Go to the out-of-the-box list views to see the full list.
- Don't change the limitation units. If needed create another WCL.
- You can edit and save the out-of-the-box reports or use the Save as option and create a customized report.
- Special characters aren't supported for service appointment field values when the service appointment field is of a string data type.
- Profiles created in Summer '23 and later have full access to the out-of-the-box Work Capacity Limit object. Reduce the access permissions of users with these profiles if they're not needed.
- Restoring the Work Capacity Limit and Work Capacity Usage objects isn't supported.
- If the availability of a WCA record is reduced to zero (for example, if all resources were deactivated), the availability calculation job doesn't update the record's availability value. Scheduling-related services aren't affected because the resources aren't available.
- In Summary view, consumption is rounded up to the next full hour. For example, a consumption of 1.4 hours is shown as two hours, and a consumption of 15 minutes is shown as one hour. This rounding doesn't affect calculations.
- A resource must be defined as a Primary Service Territory Member of a service territory to be included in availability calculations.

SEE ALSO:

[Set Up Field Service Work Capacity](#)

What's Available in Enhanced Scheduling and Optimization

Review some highlights of the Field Service Enhanced Scheduling and Optimization engine.

The Enhanced Scheduling and Optimization engine includes innovative capabilities.


Feature	Description
Appointment Insights (Beta)	Helps users understand why service appointments can't be scheduled and shows what changes they can make to qualify more time slots and candidates for scheduling.
Enhanced Optimization per Territory	Enables admins to deploy enhanced scheduling and optimization at the territory level. Define for each territory whether to use Enhanced Scheduling and Optimization. By moving the territories with simpler scheduling scenarios to use Enhanced Scheduling and Optimization, you keep the more complex scenarios for later releases, when all the service territory features are supported. This gradual rollout reduces risk and provides focused support to those territories where the new functionality has been enabled.

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer** Editions

Feature	Description
Flexible Breaks	Add multiple breaks to availability-based work rules. Flexible break times are calculated at the start of each work day. Admins set a break duration and a time window for when the break must occur relative to the start of the resource's day. Optimization can then schedule appointments and break times.
Holiday Management	Account for holiday closures. Refine your working hours by updating operating hours so that service appointments aren't scheduled on holidays.
Offsite Appointments	Indicates whether an appointment can be done remotely, with no travel time added to the schedule. For example, work such as remote technical assistance, filling out reports, or renewal of health and safety certification can be done from anywhere.
Optimization Hub	Shows the improvements that optimization makes to the scheduling of service appointments across multiple territories in one unified hub.
Scheduled Jobs	Enables you to better manage the volume of your optimization runs by setting up scheduled jobs that run separately for defined groups of service territories. Scheduled jobs gives you more control over when and how often a job runs.
Service Appointment Sliding	Enables you to free up time for a new service appointment when using appointment booking and scheduling operations. Service appointments on the Gantt can move for the same resource to an earlier or later time, within the resource's shift.
Travel Modes	Enhances predictive travel by providing more accurate travel time predictions and improving the completion rate of service appointments. By leveraging different types of travel modes, admins define the travel mode per territory, per primary service territory member, or both, to reflect transportation type (car, light truck, heavy truck, bicycle, or walking), the use of toll roads, and hazmat considerations.
Work Capacity Limits	Control the work performed by your workforce according to dynamic company priorities. Limit the number of hours or percentage of the available work capacity on certain days for specific service territories according to the value of a specific service appointment attribute.
Fix Schedule Overlaps Automated Flow	Addresses what happens to your schedule during resource schedule optimization to resolve schedule overlaps that occur due to an appointment ending late. Use the flow template recommendations or adjust the template to suit your specific use case.
Same Site	Ensures that a minimal number of mobile workers visit the same location by having the optimization services group service appointments located at the same site. Use the Same Site service objective to prefer that jobs get scheduled together while considering all other objectives and KPIs.
Skill Preference	Identifies the best-qualified candidates when optimizing your schedule. Use the Skill Preference service objective to find candidates with a skill of a certain skill type that reflects the service appointment's skill preferences. For example, a service appointment requires a caregiver who speaks English or Spanish but the preferred choice is Spanish.

Review the scheduling and optimization services available with Enhanced Scheduling and Optimization.

 **Note:** These tables list only the main services and features available in Enhanced Scheduling and Optimization. Features listed as unavailable are on the roadmap for later releases.

Scheduling and Optimization Services

Scheduling and optimization includes services used to create, schedule, reschedule, and unschedule service appointments.

Scheduling Services

Feature	Available	Not Yet Available	Notes
Appointment Booking	✓		<ul style="list-style-type: none"> The Objective Calculation explanation is missing.
Bulk Schedule	✓		
Drag & Drop	✓		
Emergency Wizard	✓		
Get Candidates	✓		<ul style="list-style-type: none"> The Objective Calculation explanation is missing.
Schedule	✓		
Schedule over lower priority appointment		✓	

Dynamic Gantt

Feature	Available	Not Yet Available	Notes
Fill-in Schedule		✓	
Fix Overlaps		✓	
Group Nearby		✓	

Optimization Services

Optimization services improve schedule quality by fixing non pinned rule-violating service appointments. If no valid schedule for these appointments exists, these service appointments are unscheduled at the end of the optimization process. Pinned service appointments remain in place during optimization.

Feature	Available	Not Yet Available	Notes
Global optimization	✓		
In-day optimization	✓		

Feature	Available	Not Yet Available	Notes
Reshuffle		✓	
Resource Schedule Optimization (RSO)	✓		
Scheduling recipes		✓	<ul style="list-style-type: none"> The Fix Schedule Overlaps automated flow replaces scheduling recipes when using Enhanced Scheduling and Optimization to resolve overlaps that occur when a mobile worker finishes an appointment late.

Transparency Services

Feature	Available	Not Yet Available	Notes
Appointment Insights	✓		
Optimization Hub	✓		

Work Rules

Work rules refine the list of candidates for a service appointment by rejecting service resources that don't match the rule. Add work rules to a scheduling policy to guide schedule optimization.

Feature	Available	Not Yet Available	Notes
Count Rule	✓		<ul style="list-style-type: none"> Complex work is supported with the Count work rule. You can use the Count work rule with relevance groups that consist of service territory members and with relevance groups that are based on service appointments. If you use the Count work rule on a custom field, the limitation considers the order of scheduled appointments, ensuring that your workers don't exceed the set limit at any point throughout the day. For example, you have a custom field that checks the capacity of your workers' vehicle, and the Count work rule is set to 10. Throughout the day, a driver picks up five units, picks up another eight units, and then drops off four units. The Count work rule registers this violation on the second service appointment and on all the following

Feature	Available	Not Yet Available	Notes
			<p>appointments that day. The total count value at any time during the day can't be negative.</p> <ul style="list-style-type: none"> Shifts spanning over midnight aren't supported. For example, a nurse has a shift that starts on Monday at 5 PM and ends on Tuesday at 5 AM, and the Count work rule is set to 10 service appointments per day. The nurse completes 8 service appointments on Monday and another 5 service appointments on Tuesday. Even though the nurse completed under 10 service appointments each day, the Count work rule recognizes it as 13 service appointments, which currently violates the rule.
Designated Work (shifts and time slots)	✓		
Excluded Resources	✓		
Extended Match	✓		<ul style="list-style-type: none"> Performance and schedule quality can be affected while using time-phased Extended Match in global optimization.
Match Boolean	✓		
Match Fields	✓		<ul style="list-style-type: none"> An empty Service Property field doesn't result in a rule violation.
Match Skills	✓		
Match Territory	✓		<ul style="list-style-type: none"> Scheduling outside working hours can result in a rule violation.
Match Time	✓		<ul style="list-style-type: none"> Check Rules doesn't distinguish which time rule led to a violation. Relevance groups are supported based on service appointment definitions only, so you can't select to apply rules only when scheduling to specific resources.
Maximum Travel from Home	✓		
Overtime	✓		<ul style="list-style-type: none"> Overtime is supported only after a shift. Overtime during a shift is considered part of regular working hours.
Required Resources	✓		

Feature	Available	Not Yet Available	Notes
Service Crew Resources Availability	✓		
Service Resource Availability	✓		<ul style="list-style-type: none"> You must include a Service Resource Availability rule in the scheduling policy. Endless travel at the expense of the resource isn't supported, so you can't leave the Travel From Home or Travel To Home fields empty. Travel at the expense of the resource can't overlap with the next or previous resource availability (including the travel time from or to home). For example, if a resource works 8:00 PM to 11:00 PM on Monday, and 4:00 AM to 8:00 AM on Tuesday, the accumulated Maximum Travel from Home can't exceed 5 hours (the time difference between the two shifts). Defining two separate shifts or time slots per resource per day isn't supported. When two separate working shifts or time slots are defined for a resource on the same day, they're considered "unified" during the scheduling and optimization process. The resource can travel between the shifts or time slots, but work isn't assigned during this time. When the travel time of a service appointment overlaps with another service appointment, a rule violation is shown only for the appointment with the overlapping travel time.
Service Resource Availability - Flexible Breaks	✓		<ul style="list-style-type: none"> A limit of up to three breaks applies.
Visiting Hours	✓		
Working Territories (for secondary territories)	✓		<ul style="list-style-type: none"> Scheduling outside working hours can result in a rule violation.

Service Objectives

A service objective is a scheduling goal or target. You can weigh service objectives to prioritize one over another. Each appointment assignment has a score of 0 to 100 for each service objective based on how fully the objective is met. The highest-scoring assignments are preferred. A scheduling policy can have one or more service objectives.

Feature	Available	Not Yet Available	Notes
Custom Objects		✓	
Minimize Overtime	✓		<ul style="list-style-type: none"> Relevance groups are supported based on service territory members only. You can't select to apply the Minimize Overtime service objective only for specific service appointments.
Minimize Travel	✓		<ul style="list-style-type: none"> Relevance groups are supported based on service territory members only. You can't select to apply the Minimize Travel service objective only for specific service appointments. The Exclude Home Base Travel option isn't supported by Enhanced Scheduling and Optimization.
Preferred Resource	✓		
Resource Priority	✓		
Schedule ASAP	✓		<ul style="list-style-type: none"> Relevance groups are supported based on service appointment definitions only. You can't select to apply the Schedule ASAP service objective only when scheduling to specific resources.
Service Appointment Priority (nonconfigurable objective)	✓		
Skill Level	✓		

Resource and Service Types

Several types of service resources and service appointments are available in Field Service.

Feature	Available	Not Yet Available	Notes
Capacity-based resource	✓		
Complex work	✓		
Crews	✓		
Individual service resources	✓		
Multiday work	✓		<ul style="list-style-type: none"> Multiday scheduling is supported in all Enhanced Scheduling and Optimization services except Appointment Booking.

Feature	Available	Not Yet Available	Notes
			<ul style="list-style-type: none"> Lunch breaks are shown on the Gantt as an overlap with the multiday service appointment when using Enhanced Scheduling and Optimization. Multiday work doesn't support visiting hours when using Enhanced Scheduling and Optimization.
Resource Efficiency	✓		<ul style="list-style-type: none"> Resource efficiency is rounded up when using Enhanced Scheduling and Optimization.
Standard service appointments	✓		

Enable Enhanced Scheduling and Optimization

USER PERMISSIONS

To enable Field Service:	Customize Application
To install the Field Service managed package:	Customize Application
To assign a permission set license:	Manage Users
To create a permission set:	Manage Profiles and Permission Sets
To enable Enhanced Scheduling and Optimization:	Customize Application

EDITIONS


Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer** Editions

Enhanced Scheduling and Optimization must be enabled to start using its features. As of Summer '23, new Salesforce orgs have Enhanced Scheduling and Optimization enabled by default for all service territories. Existing orgs can opt in and enable the enhanced engine for all or selected service territories. The enhanced engine is an improvement of the optimization functionality and associated manual and semiautomatic scheduling services you've been using. The enhanced architecture and services are more efficient and improve scalability, performance, and schedule quality. Make sure you examine the Enhanced Scheduling and Optimization considerations and limitations before using the enhanced engine.


 *This is a Field Service managed package feature.*

Make sure that you meet these requirements.

- Field Service is enabled.
- The latest version of the Salesforce Field Service managed package is installed.

 **Note:** Enhanced Scheduling and Optimization uses point-to-point predictive routing regardless of the travel time calculation preferences set in the Routing section of Field Service Settings.

- From Setup, in the Quick Find box, enter *Field Service*, and then select **Field Service Settings**.
- Select **Field Service Enhanced Scheduling and Optimization** and then save your changes.

 **Note:** Turning on Field Service Enhanced Scheduling and Optimization also turns on Field Service Integration.

Field Service Settings

Field Service
To get started, see [Set Up Field Service](#).

Sharing
 Share dispatched service appointments with their assigned resources ⓘ

Field Service Integration
 Permissions to access data needed for optimization, automatic scheduling, and service appointment bundling.

Field Service Enhanced Scheduling and Optimization
 Use enhanced scheduling and optimization. ⓘ

Appointment Assistant ⓘ

Enable Appointment Assistant through Experience Cloud Sites

Appointment Assistant Status Update
The value that prompts the first event for Appointment Assistant.
Status
Select an Option ▼

Appointment Assistant ETA URL
Paste the Site URL to enable Appointment Assistant.
Site URL
Paste Site URL

[What's the Fate of Older Salesforce Customizations?](#)

Orgs existing prior to Summer '23 can enable Enhanced Scheduling and Optimization for all or selected service territories. Enhanced Scheduling and Optimization is backward compatible so your existing implementations remain in place after you enable it.

[Considerations for Enhanced Scheduling and Optimization](#)

Before using Enhanced Scheduling and Optimization, make sure you review some considerations.

[Limits and Limitations for Enhanced Scheduling and Optimization](#)

Learn about the Enhanced Scheduling and Optimization limits and limitations.

SEE ALSO:

[Add Holidays to Operating Hours](#)

[Requirements for Appointment Insights \(Beta\)](#)

[Set Up Travel Modes](#)

[Enable Field Service](#)

[Install the Field Service Managed Package](#)

[Assign Field Service Permissions](#)

[Create Field Service Permission Sets](#)

[Set Up Enhanced Optimization for Field Service Territories](#)

[Set Up Routing for Travel Time Calculations](#)

[Transition to Enhanced Scheduling and Optimization](#)

[Set Up Enhanced Optimization for Field Service Territories](#)

What's the Fate of Older Salesforce Customizations?

Orgs existing prior to Summer '23 can enable Enhanced Scheduling and Optimization for all or selected service territories. Enhanced Scheduling and Optimization is backward compatible so your existing implementations remain in place after you enable it.

If you're scheduling work using Queueable Apex, use the Database.AllowsCallouts annotation for the Enhanced Scheduling and Optimization engine. If you don't include this annotation, the request causes an exception. See [Queueable Apex: More Than an @future](#).

Enhanced Scheduling and Optimization uses processes and information that aren't locally primed. A callout is used to trigger a requested service and retrieve information. If DML occurs before the callout, it causes an exception, for example, an uncommitted work pending error. To avoid an exception, ensure that DML is completed in a [separate DML transaction](#).

EDITIONS

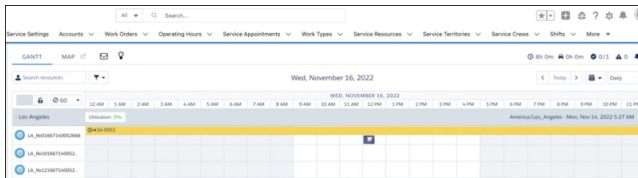
Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise, Unlimited, and Developer Editions**

Considerations for Enhanced Scheduling and Optimization

Before using Enhanced Scheduling and Optimization, make sure you review some considerations.

 This is a Field Service managed package feature.

- Lunch breaks are shown on the Gantt as an overlap with the multiday service appointment when using Enhanced Scheduling and Optimization.



EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise, Unlimited, and Developer Editions**

- Travel time to the next appointment is shown on the Gantt before the lunch break.
- Enhanced Scheduling and Optimization uses point-to-point predictive routing regardless of the travel time calculation preferences set in the Routing section of Field Service Settings.
- If you're scheduling work using Queueable Apex, use the Database.AllowsCallouts annotation for the Enhanced Scheduling and Optimization engine. If you don't include this annotation, the request causes an exception. See [Queueable Apex: More Than an @future](#).
- If an absence doesn't have an address, Enhanced Scheduling and Optimization uses the location of the last event (service appointment or resource absence) that has a location to calculate the travel time to the next event. This could result in fewer scheduling options in case an event with no location is scheduled close to the end of the working hours, if there isn't enough room for travel back to the service resource's home base after that event.
- Enhanced Scheduling and Optimization fails if two service appointments, resource absences, or their travel times overlap outside the service resource's working hours.

Limits and Limitations for Enhanced Scheduling and Optimization

Learn about the Enhanced Scheduling and Optimization limits and limitations.

 *This is a Field Service managed package feature.*

Platform Limits Affecting Field Service

One of the main benefits of using Enhanced Scheduling and Optimization is fewer limitations.


Limit	Scheduling and Optimization	Enhanced Scheduling and Optimization
Maximum number of Apex classes scheduled concurrently (Scheduled Jobs)	100	100, but you're not likely to reach this limit because you can configure many optimization runs per scheduled job. Each job consumes one Apex scheduled job. See Manage Scheduled Jobs in Field Service .
Number of synchronous concurrent transactions for long-running transactions that last longer than 5 seconds for each org	10	Not applicable
Apex batch job executing in parallel	5	Not applicable
Maximum service appointments optimized per rolling 24 hours	50,000	Relative to the number of your user licenses. You can check this limit in Setup under Company Information > Optimization Requests, Last 24 Hours .

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer Editions**

Limitations

Before using Enhanced Scheduling and Optimization, make sure you review some limitations.

 **Important:** Enhanced Scheduling and Optimization uses processes and information that aren't locally primed. A callout is used to trigger a requested service and retrieve information. If DML occurs before the callout, it causes an exception, for example, an Uncommitted Work Pending error. To avoid an exception, ensure that DML is completed in a separate transaction.

Separate DML Transactions

Callouts aren't permitted when an uncommitted transaction is pending. When you're retrieving available time slots or scheduling an appointment, if a DML statement was executed before the service is called, an exception is raised. You must first commit or roll back before calling out.

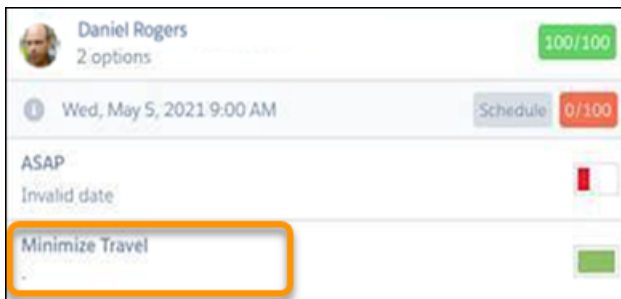
This exception is also raised when you use the standard engine and not Enhanced Scheduling and Optimization, specifically when a callout occurs to calculate travel time and either street-level routing or point-to-point predictive routing is enabled. In this scenario, the exception isn't raised when Avoid aerial calculation upon callout DML exception is disabled in the Field Service Settings, because travel time reverts to aerial routing calculation.

You can avoid the exception.

- Perform any required DML operations in a separate transaction before calling Enhanced Scheduling and Optimization. Consider creating an Apex REST API endpoint that performs the DML operations, which can be called from Apex code.
- Utilize a flow, performing the DML operations in the steps before calling Enhanced Scheduling and Optimization as an invocable action. The action element has advanced settings that allow you to configure the action to be executed as part of a new transaction. These settings aren't supported for autolaunched flows.

Scheduling and Optimization

- The Objective Calculation explanation is missing for Get Candidates and Appointment Booking.



- Scheduling a service appointment outside of a resource's working hours using drag and drop results in a rule violation. Travel time to and from the service appointment isn't calculated, and other rules aren't validated.
- Scheduling a service appointment partially outside working hours can result in a Match Territory rule violation.
- Custom time rules aren't supported.
- Scheduling over a lower priority appointment isn't supported by Enhanced Scheduling and Optimization.
- When the Arrival Window Start and Arrival Window End don't overlap with the Earliest Start Permitted and Due Date, a Match Time error is shown.
- When all the service appointments for a day are optimized and then unscheduled, utilization isn't shown accurately on the Gantt.
- The Calculate travel and breaks option in the Routing section of Field Service Setting isn't supported. Enhanced Scheduling and Optimization always calculates travel time and breaks.
- Global optimization results don't include the number of scheduled service appointments. A message appears showing that service appointments were scheduled. For metrics on each optimization run, refer to [Optimization Hub](#).
- If you have an implementation that uses resource efficiencies, enhanced optimization can result in overlaps if service appointments are pinned, or unscheduling of appointments if unpinned (since there isn't enough space in the schedule). This is because Enhanced Scheduling and Optimization rounds up the service appointment duration.
- Enhanced Scheduling and Optimization can't schedule a service appointment exactly at the start time of a lunch break (the time set in the Break Start field in the Resource Availability work rule). When you're using Appointment Booking, the scheduling engine doesn't return this time slot, and when you manually schedule the service appointment on the Gantt, the appointment overlaps with the lunch break. We recommend that you schedule the service appointment for a minute before or after the break start. For Appointment Booking, set the time slot in the Appointment Booking operating hours to start a minute before or after the break.

- During optimization, trigger results are updated in a batch with a maximum CPU time of 60 seconds, because the transition is asynchronous. When using Enhanced Scheduling and Optimization, this CPU time is reduced to 10 seconds, because the transaction is synchronous. To improve the trigger performance, optimize the logic developed in Apex Triggers on the Service Appointment and Resource Absence object. Consider moving logic to run as part of an asynchronous process, for example, Queueable Apex. Contact Salesforce Customer Support to optimize the batch size that is used to write the results back to Salesforce.
- The Objects Scheduled field of the optimization request isn't updated during optimization. You can view and track all optimization information related to an optimization request in the [Optimization Hub](#).
- The Maximum service appointments optimized per rolling 24 hours field also considers scheduling services such as scheduling, Appointment Booking, and Get Candidates. Each scheduling service operation is counted as one service appointment from the limit.
- A scheduled path in a record-triggered flow doesn't always work with optimization when Enhanced Scheduling and Optimization is enabled. In this case, the optimization updates are done by the platform integration user who has a session-based permission set that isn't active during the scheduled path's execution. To grant this user the necessary permission, clone the Field Service Integration permission set, disable the Session Activation Required option, and then save. Then assign this permission set to the platform integration user. You can add more permission sets to this user if it's necessary.
- Enhanced Scheduling and Optimization uses the Platform Integration User. This user has a Cloud Integration User license, which has limited object access and platform capabilities. Some of your customizations can be impacted due to this limitation. We recommend you check that all your customizations have the required access and are working as designed. Add permissions to the Platform Integration User as required.
- 24-hour operating hours coverage isn't supported for mobile workers and capacity-based resources.

Service Appointments and Service Resources

- When two working shifts or time slots are defined for a resource on the same day, each shift or time slot is considered as if it's a different "day", such that it includes the resource traveling to and from the home base.
- When a lunch break overlaps with a service appointment or resource absence, newly booked or scheduled service appointments can result in a schedule overlap with the lunch break.
- Snapping (scheduling using ctrl/cmd + drag and drop) a service appointment to a resource absence isn't supported and doesn't change the schedule.
- When manually scheduling a multiday service appointment using drag and drop, the scheduled start time must be within a valid timeframe for the duration to be calculated correctly. For example, if the multiday service appointment is scheduled to start when the service resource isn't available (during a non-availability shift, resource absence, or lunch break), then the multiday service appointment duration isn't calculated accurately to account only for working hours.
- The combination of multiday scheduling and complex work isn't supported. If a multiday service appointment is part of a scheduling dependency, its scheduled end date isn't calculated when the appointment is scheduled.

SEE ALSO:

[Limitations for Appointment Insights \(Beta\)](#)

[Configure Enhanced Optimization per Territory](#)

[Transition to Enhanced Scheduling and Optimization](#)


Set Up Enhanced Optimization for Field Service Territories

As of Summer '23 new Salesforce orgs have Enhanced Scheduling and Optimization enabled for all service territories. Existing orgs can switch to use Enhanced Scheduling and Optimization for all service territories or per territory. Enhanced Optimization per Territory enables you to deploy Enhanced Scheduling and Optimization only on selected territories, for example, territories with simpler scheduling scenarios. This gradual rollout lets you keep the more complex scheduling scenarios for later releases, when all the service territory features are supported.

 *This is a Field Service managed package feature.*

To enable all service territories to use Enhanced Scheduling and Optimization, in Field Service Settings, select **Scheduling > General Logic** and then select **Use enhanced scheduling and optimization for all service territories**.

Use Enhanced Scheduling and Optimization when service appointments or service resources don't have an associated service territory. In Field Service Settings, select **Scheduling > General Logic** and then check that **Use enhanced scheduling and optimization when there isn't an associated service territory** is enabled.

 **Note:** All service appointment territories and service resource territories within the same optimization request must use the same optimization engine. A notification is shown when you're running bulk operations such as global optimization with different territory optimization settings, because it can't be determined which optimization engine to use.

Before you set up Enhanced Optimization per Territory, make sure that you meet these requirements.

- All Enhanced Scheduling and Optimization requirements are met.
- Enhanced Scheduling and Optimization is enabled.

The operation you're performing determines the selected optimization engine.

- For service appointment operations (Drag and Drop, Get Candidates, Schedule, Unschedule, and Check Rules), the associated territory of the appointment determines the optimization engine.
- For global optimization operations, the selected territory determines the optimization engine.
- For resource absence operations (Drag and Drop, create new, and delete), the resource's associated territory member determines the optimization engine.

[Configure Enhanced Optimization per Territory](#)

Configure your Enhanced Optimization per Territory settings and assign user permissions.

[Limitations for Enhanced Optimization per Territory](#)

All Limits and Limitations for Enhanced Scheduling and Optimization apply to Enhanced Optimization per Territory.

SEE ALSO:

- [Set Up Travel Modes](#)
- [Enable Enhanced Scheduling and Optimization](#)
- [Get Ready for Field Service Scheduling and Optimization](#)
- [Enable Enhanced Scheduling and Optimization](#)
- [Transition to Enhanced Scheduling and Optimization](#)

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise, Unlimited, and Developer** Editions

USER PERMISSIONS

To enable Enhanced Optimization Per Territory:


- Customize Application

Configure Enhanced Optimization per Territory

Configure your Enhanced Optimization per Territory settings and assign user permissions.

 *This is a Field Service managed package feature.*

1. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**. Next, click **Service Territory**, and then scroll to the Page Layouts section.
2. Click **Page Layouts**, and then click **SFS Service Territory Layout**.
3. Click **Edit**.
4. Drag the **Use enhanced scheduling and optimization** field to the page layout, and then save your changes.
5. From the App Launcher, find and open the **Field Service Admin** app, and then click the **Service Territories** tab.
6. Click the service territory name for which you want to enable enhanced optimization.
7. Select **Use enhanced scheduling and optimization**.
8. To avoid misalignments in the schedule due to scheduling using different engines, pin the service appointments scheduled for the next day, and then unschedule all appointments from the following day onwards so that the Gantt is empty.
9. Run optimization using the enhanced optimization engine, or reschedule all service appointments.

 **Tip:** We recommend uncheduling and rescheduling the service appointments during off-hours to avoid the possibility of double-booking.

SEE ALSO:

[Limits and Limitations for Enhanced Scheduling and Optimization](#)

[Limitations for Enhanced Optimization per Territory](#)

[Set Up and Run Enhanced Optimization Jobs](#)

[Transition to Enhanced Scheduling and Optimization](#)

Limitations for Enhanced Optimization per Territory

All Limits and Limitations for Enhanced Scheduling and Optimization apply to Enhanced Optimization per Territory.

 *This is a Field Service managed package feature.*

Consider these limitations when **Use enhanced scheduling and optimization for all service territories** is disabled in the Field Service Settings and only selected territories are using Enhanced Scheduling and Optimization.

- All service appointment territories and service resource territories within the same optimization request must use the same optimization engine. A notification is shown when you're running bulk operations such as global optimization with different territory optimization settings, because it can't be determined which optimization engine to use.
- If there are customizations that update these fields in a single process or transaction, all the service appointments within that process must be associated with service territories configured to use the same optimization engine: `ServiceAppointment.SchedStartTime`, `ServiceAppointment.SchedEndTime`, and `AssignedResource.ServiceResource`.

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer Editions**

USER PERMISSIONS

To enable Enhanced Optimization Per Territory:

- Customize Application

EDITIONS

Available in: Available in Lightning Experience and Salesforce Classic in these editions where Field Service is enabled: **Enterprise**, **Unlimited**, and **Developer Editions**

- Service appointments assigned to use Enhanced Scheduling and Optimization can be scheduled only to a resource with a primary territory enabled for Enhanced Scheduling and Optimization.
- Resources with multiple primary territories, where each territory is set for a different date, must have all territories assigned to the same optimization engine.

SEE ALSO:

[Configure Enhanced Optimization per Territory](#)

Set Up Field Service Appointment Bundling

Group short appointments at nearby or same-site locations to create a bundle.

Watch the video to see how grouping short appointments at nearby or same-site locations to create a bundle helps you and your customers.

 [Watch a video](#)

Watch the video to learn how to configure Appointment Bundling.

 [Watch a video](#)

Service appointment bundling lets you collect multiple service appointments and define them as a single entity, called a bundle. The bundle:

- Simplifies the dispatcher's work by treating a set of relatively small service appointments as one, large unified job.
- Helps mobile workers work more efficiently by organizing the service appointments in an assembly line manner.
- Improves customer satisfaction by scheduling a mobile worker to perform all the customer's service appointments in a single visit.

Consider the job of reading 100 water meters in the utility room of a high-rise apartment complex. The job can be scheduled in several ways.

- **100 short appointments**—Create and schedule a service appointment for each meter. Each service appointment has a duration of 30 seconds. This approach provides maximum flexibility. You can schedule each service appointment independently of the others. However, this approach also has high computational overhead because the system must schedule numerous service appointments, and having 100 short service appointments on the Gantt is confusing for the dispatcher. The schedule specifies a precise sequence in which the meters must be read, even if the mobile worker finds another sequence more convenient. This approach could cause other inefficiencies, too. Suppose the mobile worker must get the key to unlock the utility room. If you schedule the service appointments individually, the mobile worker must technically unlock the room multiple times.
- **One long appointment**—Create and schedule the entire job as a single service appointment. This approach has low computational overhead and is easy to understand. It implements economies of scale, such as unlocking the utility room only one time. The disadvantage is the lack of flexibility. You must schedule the entire service appointment to a single mobile worker in a single assignment. You can't schedule an urgent job in the middle of the long service appointment. And you can't reschedule meters that the mobile worker couldn't access during the service appointment.
- **A single bundle appointment**—Create a service appointment for each meter and bundle them together to create a single entity. The individual service appointments then become bundle members. You can apply constraints to ensure that the bundle is efficient, for example, that only similar service appointments in the same location can be bundle members. This approach has all the advantages of the long service appointment approach, plus the flexibility of the short service appointments approach.
 - **Low computational overhead**—Only the bundle is scheduled, not the bundle members.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- **Easy to understand**—The dispatcher sees only one service appointment on the Gantt. The dispatcher can drill down and view the bundle members as required.
- **Flexibility**—The mobile worker can perform the service appointments in any sequence. You can add or remove service appointments from the bundle if needed.
- **Better tracking**—If a meter can't be accessed, it can be skipped without being forgotten because the system marks the individual service appointment as incomplete.
- **Economies of scale**—In our example, the mobile worker unlocks the utility room only one time, unless returning for incomplete bundle members.

Meter reading is only one example of how bundling service appointments can improve the efficiency of a schedule. Other scenarios include:

- **Same customer scheduling**—Bundle together all the service appointments of a single customer. The customer is pleased because a single mobile worker arrives at a single time to perform all the services.
- **Same site scheduling**—Bundle together all the service appointments in a large office building, even if they are for different customers. The mobile worker saves time by traveling, parking, and passing the building security only one time.
- **Out-of-town scheduling**—Bundle together all the service appointments for an out-of-town job. For example, a Chicago-based organization has several appointments in Cleveland. Bundle together all the Cleveland appointments and schedule the bundle to a single mobile worker. The mobile worker can then stay overnight in Cleveland until all the service appointments are complete.
- **Scheduling similar tasks**—Bundle together service appointments of a similar type. For example, an organization prefers to assign a single mobile worker to perform all its network-related service appointments on a single day.

[Add Permissions for Service Appointment Bundling](#)

Add the permissions for service appointment bundling.

[Enable Service Appointment Bundling](#)

Enable appointment bundling in Field Service Settings.

[Set Up Automatic Bundling](#)

Use automatic bundling to create and update bundles instead of managing them manually. Automatic bundling includes two modes: Automated Bundling and Live Bundling. The automatic bundling process looks for service appointments in a particular service territory and then looks at the priority of the bundle policy. After the bundles are created, they appear in the work list and can be scheduled.

[Create Recordset Filter Criteria for Bundling Appointments](#)

You can create filters to bundle only the appointments that meet the criteria that you set. Creating recordset filter criteria is optional, but if you want to use them in the bundle policies, you must create them first.

[Create an Appointment Bundle Policy](#)

Use the default policy, or create multiple policies. You can use the policies for manual bundling, automatic bundling, or both.

[Create an Appointment Bundle Config](#)

Use the default configuration, or edit it to determine the status behavior when bundling and unbundling service appointments. These configuration settings apply to all your bundles.

[Test Your Appointment Bundling Configuration](#)

After completing the configuration steps for appointment bundling, test it in Field Service.

[Appointment Bundling Limitations](#)

Review the limitations of Appointment Bundling.

SEE ALSO:

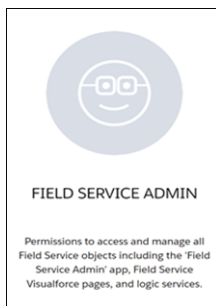
[Salesforce Developer: Appointment Bundling](#)

Add Permissions for Service Appointment Bundling

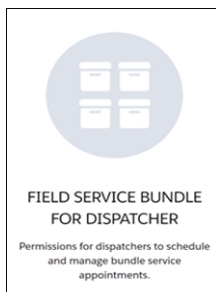
Add the permissions for service appointment bundling.

! **Important:** Without these permissions, appointment bundling isn't available.

1. In Field Service Settings, click **Getting Started**, and then click **Permission Sets**.
2. Add these permissions.
 - Field Service Admin—Required for configuring the appointment bundling settings.



- Field Service Bundle for Dispatcher—Required for using the appointment bundle actions in the Dispatcher Console.



- Field Service Integration—Required for accessing the Hyperforce appointment bundling services.

EDITIONS

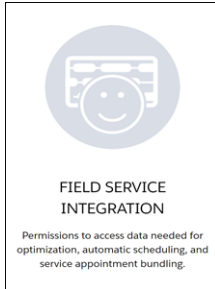
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience


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

USER PERMISSIONS

To add permissions:

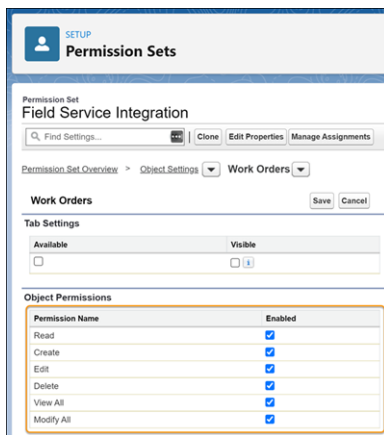
- Manage Profiles and Permission Sets



 **Note:** If the Field Service Integration card doesn't appear, contact Salesforce Customer Support.

If your org has processes that use create, update, and delete actions for the Work Orders, Service Appointments, or Skills objects, enable object permissions.

- a. From Setup, in the Quick Find box, enter *users*, and then select **Permission Sets**.
- b. Click **Field Service Integration**.
- c. Under Apps, click **Object Settings**.
- d. Click the required object.
- e. Click **Edit**.
- f. Enable these permissions.



- g. Save your changes.

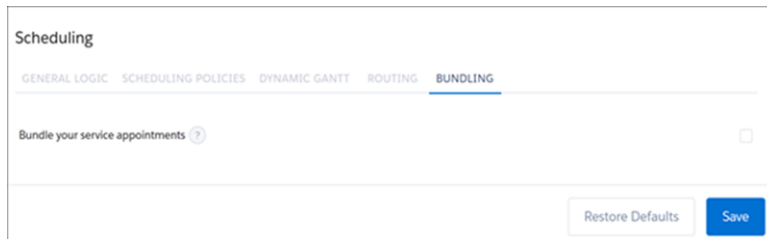
Make sure that the appointment bundling actions are enabled.

1. From Setup, in the Quick Find box, enter *users*, and then select **Permission Sets**.
2. Click **Field Service Admin Permissions**.
3. Click **Custom Permissions**, and then click **Edit**.
4. Add the appointment bundling custom permissions: FSL.Bulk Bundle, FSL.Bulk Unbundle, FSL.Gantt and List Bundle and Unbundle, FSL.Service List View - Exclude Bundle Members.
5. If you use Experience Builder sites, add the appointment bundling custom permissions also to the Field Service Community Dispatcher permission set.

Enable Service Appointment Bundling

Enable appointment bundling in Field Service Settings.

1. From the App Launcher, open **Field Service Settings**.
2. Click **Scheduling**, and then click **Bundling**.



3. Enable bundling service appointments and save your changes.
4. To access the additional settings, refresh your browser.

[Default Appointment Bundle Policy and Related Policies](#)

If no policies exist, a default appointment bundle policy is created along with some of its related policies. Access Appointment Bundle Policy from the App Launcher. Access the remaining policies from the Related tab of the appointment bundle policy.

[Default Appointment Bundle Config](#)

If an appointment bundle config doesn't exist, a default one is created. Access Appointment Bundle Config from the App Launcher.

Default Appointment Bundle Policy and Related Policies

If no policies exist, a default appointment bundle policy is created along with some of its related policies. Access Appointment Bundle Policy from the App Launcher. Access the remaining policies from the Related tab of the appointment bundle policy.

Default Appointment Bundle Policy

Field	Default Value	Result
Priority	1	The default bundle policy is applied first.
Manual Bundling	True	This policy is available when the dispatcher manually bundles service appointments in the dispatcher console.
Automatic Bundling	True	This policy is available when automatic bundling is triggered.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To enable appointment bundling:

- Customize Application

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field	Default Value	Result
Limit Amount of Bundle Members	200	You can include up to 200 bundle members in a bundle. This field is relevant only for automatic bundling, not for manual bundling.

Default Appointment Bundle Sort Policy

Field	Default Value	Result
Sort Field Name	Due Date	The bundle members are sorted according to their due date.
Sort Direction	Ascending	The bundle members are in an ascending order.
Sort Type	Sort Within a Bundle	The default sort policy defines the order of bundle members in the bundle.
Sort Order	1	The default sort policy is triggered first.

Default Appointment Bundle Restriction Policy

Field	Default Value	Result
Restriction Field Name	Street	You can bundle service appointments that are on the same street.
Allow Empty	False	You can't bundle service appointments that have an empty restriction field with service appointments that have a value in the restriction field.
Restrict in Manual Mode	True	The default restriction policy applies to manual bundling.
Restrict in Automatic Mode	True	The default restriction policy applies to automatic bundling.
Restrict by Date Only	True	If Restriction Field Name is of type Date/Time, the bundle is restricted by the time of day and by the calendar date.

Default Appointment Bundle Aggregation Policies

Field in Bundle Service Appointment	Aggregation	Result
Address	Address of the first bundle member service appointment according to the sort policy.	The bundle service appointment's address is pulled from the first bundle member service appointment.
Due Date	Earliest due date of all bundle member service appointments	The bundle service appointment's due date is pulled from the earliest due date of the bundle member service appointments.
Duration	Sum of the duration of the bundle member service appointments	The bundle service appointment's duration is equal to the sum of all bundle member service appointments' duration.
Earliest Start Permitted	Latest start time of all bundle member service appointments	The bundle service appointment's earliest start permitted is pulled from the latest start of the bundle member service appointments.
Pinned	False	When the bundle is created, the bundle service appointment isn't pinned.
Service Territory	Copied from one of the bundle member service appointments	The bundle service appointment's service territory field is pulled from one of the bundle member service appointments.
Skill Requirements (in Work Order)	Sum of the skills of the bundle member service appointments, without duplication	<p>The bundle service appointment's work order lists the skills of all bundle member service appointments.</p> <p>If the skills are updated in a bundle member service appointment after the bundle is created, the skills aren't aggregated to the bundle service appointment. Update the bundle service appointment's skills manually.</p>



Note: The default configuration of the Service Territory and Address fields don't appear in the list of default aggregation policies.

SEE ALSO:

[Create an Appointment Bundle Sort Policy](#)

[Aggregation Configurations](#)

[Create an Appointment Bundle Policy](#)

[Create an Appointment Bundle Restriction Policy](#)

Default Appointment Bundle Config

If an appointment bundle config doesn't exist, a default one is created. Access Appointment Bundle Config from the App Launcher.

Field	Default Value	Result
Add to Bundle Statuses	<ul style="list-style-type: none"> • None • Scheduled • Dispatched • In Progress 	You can add service appointments in these statuses to a bundle.
Remove from Bundle Statuses	<ul style="list-style-type: none"> • Canceled • None • Scheduled • Dispatched • In Progress 	You can remove service appointments in these statuses from a bundle.
Add travel time to bundle duration	False	Travel time between bundle member service appointments isn't included in the bundle's duration.
Status on Removal from Bundle	<ul style="list-style-type: none"> • None 	When a service appointment is removed from a bundle, it receives the None status.
Statuses not to Update on Unbundling	<ul style="list-style-type: none"> • Canceled • Completed • Cannot Complete 	The status of service appointments in these statuses isn't updated when a bundle is unbundled.
Bundle Statuses to Propagate	All statuses are selected.	The status of bundle member service appointments is always overridden by the status of the bundle service appointment.
Bundle Member Statuses not to be Propagated	<ul style="list-style-type: none"> • Canceled • Completed • Cannot Complete 	The status of bundle member service appointments with these statuses isn't overridden.
Criteria for Automatic Unbundling	Empty	Automatic unbundling doesn't occur.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Set Up Automatic Bundling

Use automatic bundling to create and update bundles instead of managing them manually. Automatic bundling includes two modes: Automated Bundling and Live Bundling. The automatic bundling process looks for service appointments in a particular service territory and then looks at the priority of the bundle policy. After the bundles are created, they appear in the work list and can be scheduled.

The automatic bundling process creates bundles:

- If at least two service appointments can be bundled
- Split by service territories that are part of the bundle policy
- Without service appointments that have scheduling dependencies
- For Automated Bundling, if the time between the Earliest Start Permitted and the Due Date of the service appointments overlaps with a 7-day period that starts at the time of the scheduled automatic bundling process. For example, if the Earliest Start Permitted of a service appointment is before the start of the 7-day period and the Due Date is after the end of the 7-day period, it can still be added to the bundle.

For Live Bundling, if the time between the Earliest Start Permitted and the Due Date of the service appointments overlaps with a 2-day period that starts at the time of the scheduled automatic bundling process. For example, if the Earliest Start Permitted of a service appointment is before the start of the 2-day period and the Due Date is after the end of the 2-day period, it can still be added to the bundle.

It's recommended to configure restriction policies for the Earliest Start Permitted and Due Date fields. That way, the automatic bundling process doesn't fail because of service appointments that have an earlier due date than the earliest start permitted.

 **Important:** Automatic bundling requires at least one of each of these policies:

- Restriction policy with Restrict in Automatic Mode selected
- Service territory policy
- Bundle policy with Automatic Bundling selected

Configure the Settings

1. From the App Launcher, find and select **Field Service Settings**.
2. Click **Scheduling**, and then click **Bundling**.
3. Set up Automated Bundling to schedule the bundling process during low-activity times.
 - a. Turn on **Automated Bundling**.
 - b. Schedule the process.
 - c. Click **Apply**. In this example, the automated bundling process is scheduled to run daily at 11 PM.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To set up automatic bundling:

- Customize Application

Scheduling

GENERAL LOGIC SCHEDULING POLICIES DYNAMIC GANTT ROUTING **BUNDLING**

Service appointment bundles are active.

Automated Bundling ON
 Schedule the bundling process during low-activity times.

Day of week Day of month

Sun Mon Tue Wed Thu Fri Sat

Hour: 23 Minute: 0

Apply

Restore Defaults Save

4. Set up Live Bundling to update or create bundles when service appointments are modified or added to your appointment list. Live bundling adds bundle members only to bundles that were created with automatic bundling. It doesn't add bundle members to bundles that were created manually. If a bundle member is manually removed from a bundle, live bundling doesn't add it to the same bundle again.
 - a. Turn on **Live Bundling**.
 - b. Define the frequency of the updates, from 5 to 15 minutes.
 - c. Click **Apply**.

Scheduling

GENERAL LOGIC SCHEDULING POLICIES DYNAMIC GANTT ROUTING **BUNDLING**

Service appointment bundles are active.

Automated Bundling OFF
 Schedule the bundling process during low-activity times.

Day of week Day of month

Sun Mon Tue Wed Thu Fri Sat

Hour: 23 Minute: 0

Apply

Live Bundling ON
 Automatically updates bundles when service appointments are modified, deleted, or added to your appointment list.

Bundle Update Frequency (in minutes)

Apply

Service appointments are reconsidered for Live Bundling when you update any of these fields.

- Service Territory
- Due Date
- Early Start
- Status
- Pinned
- Any other field defined in a bundle restriction policy
- Any other field defined in a recordset filter criteria

Monitor the Automatic Bundling Requests

1. You can receive an email when the automated bundling process fails. To activate the flow that sends the email, take these steps.
 - a. From Setup, in the Quick Find box, enter *Process Automation*, and then select **Flows**.

b. Open the Send Email for Automated Bundling Failures flow.

c. To use the flow as is, click **Activate**.

d. To modify the flow, click **Save As**.

A warning is shown, but if you've verified that the Automated Process user has an email address entered in the settings, you can ignore this warning. To check whether it's entered, from Setup, in the Quick Find box, enter *Process Automation*, and then select **Process Automation Settings**. Make sure that Automated Process User Email Address is populated.

e. To check the start time of the flow, edit the Start element and change it as needed. The time is set according to the Automated Process user's time zone.

f. The email is sent to the first admin user, according to alphabetical order. To change the recipient of the email, edit the Send Email element, and in the Recipient Address List, enter one or more email addresses.

g. Activate your version of the flow.

2. Dispatchers can see the status of automatic bundling requests by clicking the light bulb in the Dispatcher Console. Automatic bundling requests can also be monitored in the Optimization Requests tab. Automated bundling requests that didn't manage to run aren't monitored. If the automatic bundling optimization requests don't appear, take these steps.

a. From the object management setting for Optimization Requests, go to Fields & Relationships.

b. Search for and open the **Type** field.

c. If you're using a new Salesforce org, activate the Automated Bundling and Live Bundling picklist values. If you're using an upgraded Salesforce org, create the Automated Bundling and Live Bundling picklist values.

SEE ALSO:

[Create an Appointment Bundle Policy](#)

[Monitor Optimization Requests](#)

Create Recordset Filter Criteria for Bundling Appointments

You can create filters to bundle only the appointments that meet the criteria that you set. Creating recordset filter criteria is optional, but if you want to use them in the bundle policies, you must create them first.

1. Create recordset filter criteria for the bundle policies.
2. For Source Object, select if the recordset filter criteria is intended for the:

Appointment Bundle Aggregation Policy	Determines on which group of service appointments the aggregation applies.
Appointment Bundle Config	Determines in which criteria a bundle is automatically unbundled.
Appointment Bundle Policy	Determines which service appointments can be bundled using this policy.

3. For Filtered Object, select **Service Appointment**.

4. Select **Active**.

Considerations:

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 recordset filter criteria:

- Customize Application

- Inactive recordset filter criteria aren't supported. See [Appointment Bundling Limitations](#).
- All service appointment fields used in recordset filter criteria must be enabled in the Field Service Integration permission set.

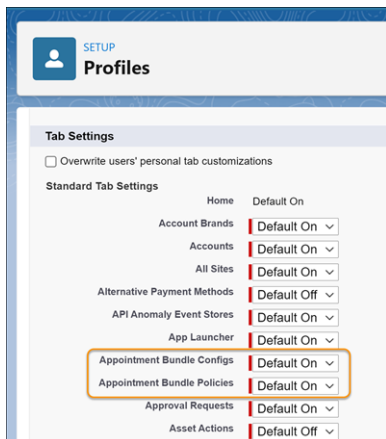
SEE ALSO:

- [Create Filters to Match Appointments and Shifts](#)
- [Create an Appointment Bundle Aggregation Policy](#)
- [Create an Appointment Bundle Config](#)
- [Create an Appointment Bundle Policy](#)

Create an Appointment Bundle Policy

Use the default policy, or create multiple policies. You can use the policies for manual bundling, automatic bundling, or both.

1. If your service appointments have custom fields, make sure to give the fields read access. See [Appointment Bundling Limitations](#).
 - a. From Setup, in the Quick Find box, enter `users`, and then select **Permission Sets**.
 - b. Click **Field Service Integration**.
 - c. Click **Object Settings**.
 - d. Click **Service Appointment**.
 - e. For each custom field, select **Read Access**.
2. From the App Launcher, open **Appointment Bundle Policies**.
If you don't see Appointment Bundle Policies in the App Launcher:
 - a. From Setup, in the Quick Find box, enter `users`, and then select **Profiles**.
 - b. On the Salesforce admin profile, click **Edit**.
 - c. From Profile Detail, click **Edit**.
 - d. Under Tab Settings, set the bundle tabs to **Default On**.



- e. Save your changes and refresh your browser.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 items:

- Customize Application

3. On the Appointment Bundle Policies page, click **New**.
4. Give the policy a unique name.
5. To make this policy available when the dispatcher manually bundles service appointments in the dispatcher console, select **Manual Bundling**.
6. To make this policy available when automatic bundling is triggered, select **Automatic Bundling** and enter the details. Automatic bundling includes two modes, Automated Bundling and Live Bundling. You can have manual bundling and automatic bundling enabled at the same time.
 - a. For Priority, enter a unique policy priority number. The priority determines the order that the policies are applied.
 - b. For Limit Amount of Bundle Members, enter the maximum number of bundle members to include, up to 200.
 - c. For Limit Duration of Bundle, enter the maximum duration of a bundle, in minutes. The recommended limit is 240 minutes.

 **Note:** The Limit Amount of Bundle Members and Limit Duration of Bundle fields are relevant only for automatic bundling, not for manual bundling.
7. For Filter Criteria, select an active recordset filter to determine the bundle members. Only the service appointments that meet the criteria are bundled.
8. To make sure that enough time is allocated for the bundle, calculate the difference between the bundle's start time and the bundle's end time. If that amount of time is shorter than the bundle's duration, replace the duration with a predefined constant value.
 - a. Under Duration Calculation, select **Time Calculation by Bundle Duration Field**.
 - b. For Bundle Start Time Field Name, select the bundle service appointment field used for the bundle's start time.
 - c. For Bundle End Time Field Name, select the bundle service appointment field used for the bundle's end time.
 - d. For Constant Time Value, enter the bundle's total time as a constant value, in minutes.
9. Save your changes.
 - The Allow Scheduling Dependencies in Bundle field isn't supported.
 - Deleting a bundle policy that's in use isn't recommended.

 **Important:** Don't create triggers that update fields in any of the Appointment Bundling policies. If your configuration includes these triggers, you must delete them and apply a different configuration solution. For example, if you have a trigger that calculates duration, delete the trigger and create an aggregation duration downscale policy instead.

[Create an Appointment Bundle Sort Policy](#)

Use the default policy, or create multiple sort policies. For manual bundling, define a policy for sorting the bundle members within a bundle. The sorting is applied when bundling and unbundling service appointments. For automatic bundling, define a policy that determines the order that's used to examine the bundling candidates.

[Create an Appointment Bundle Restriction Policy](#)

Use an appointment bundle restriction policy to define restriction fields so that only service appointments with the same field values can be bundled together. Use the default policy, or create multiple restriction policies. For automatic bundling, you must have at least one restriction policy.

[Create an Appointment Bundle Propagation Policy](#)

Create a policy to determine when and how the bundle service appointment updates the fields of the bundle member service appointments. And you can create multiple propagation policies for each bundle policy. Each propagation policy controls how one bundle member service appointment field is populated.

[Create an Appointment Bundle Aggregation Policy](#)

Use the default aggregation policies, or create policies to determine when and how bundle member service appointments update the bundle service appointment fields. And you can create multiple aggregation policies for each bundle policy. Each aggregation policy controls how one bundle service appointment field is populated.

[Create Appointment Bundle Aggregation Duration Downscalers](#)

Account for one-time tasks that are part of a bundle by downscaling the duration of the bundle member service appointments. You can create multiple aggregation duration downscalers.

[Create Appointment Bundle Policy Service Territories](#)

Define one service territory for each bundle policy. Only service appointments in the defined service territory can be added to the bundle. For automatic bundling, you need at least one Appointment Bundle Policy Service Territory. For manual bundling, Appointment Bundle Policy Service Territories are optional.

[Monitor Optimization Requests](#)

Keep an eye on all Field Service schedule optimization requests from the Gantt or the Optimization Requests custom tab.

SEE ALSO:

[Monitor the Automatic Bundling Requests](#)

[Create Recordset Filter Criteria for Bundling Appointments](#)

[Appointment Bundling Limitations](#)

[Default Appointment Bundle Policy](#)

[Create Appointment Bundle Aggregation Duration Downscalers](#)

[Appointment Bundle Policy Fields](#)

Create an Appointment Bundle Sort Policy

Use the default policy, or create multiple sort policies. For manual bundling, define a policy for sorting the bundle members within a bundle. The sorting is applied when bundling and unbundling service appointments. For automatic bundling, define a policy that determines the order that's used to examine the bundling candidates.

1. If your service appointments have custom fields, make sure to give the fields read access. See [Appointment Bundling Limitations](#).
 - a. From Setup, in the Quick Find box, enter *users*, and then select **Permission Sets**.
 - b. Click **Field Service Integration**.
 - c. Click **Object Settings**.
 - d. Click **Service Appointment**.
 - e. For each custom field, select **Read Access**.
2. In the Appointment Bundle Policy, go to the Related tab.
3. In the Appointment Bundle Sort Policies panel, click **New**.
4. Give the policy a unique name.
5. For Sort Field Name, select the service appointment field that sorts the bundle members. The fields in the list are service appointment fields, not work order fields. The only exception is Skill Requirements, which is a work order field.
6. For Sort Direction, set the order of the appointments in a bundle to ascending or descending.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 items:

- **Customize Application**

7. For Sort Type, select one of these options.

Sort Within a Bundle

Defines the order of bundle members. It's also used when you unbundle to define the order that the service appointments are scheduled on the Gantt.

Sort for Automatic Bundling

Defines the order that automatic bundling uses to evaluate the candidate service appointments to be bundled.

8. For Sort Order, determine in which order the sort policy is triggered. For example, enter *1* to trigger this policy first.
9. Save your changes.



Example: A mobile worker must read all the water meters on a long street. According to the default sort policy, the worker must complete the appointments in ascending order according to their due date, without considering the house numbers. To save time, let the mobile worker complete all appointments on one side of the street before continuing to the other side.

1. Create a custom numeric field for the house number.
2. Create a numeric formula field that differentiates between odd and even house numbers. If the house number is even, leave it as is. If the house number is odd, multiply the number by -1 .

```
IF(MOD( HouseNumber__c,2)=0, HouseNumber__c, -1*HouseNumber__c)
```

3. Create restriction policies for the City and Street fields, meaning that all bundle members must be in the same city and on the same street.
4. Create a sort policy for the numeric formula field that you created. Set the policy to sort the bundle members in ascending order. For example, on a street with 10 houses, the appointments are now sorted in this order: $-9, -7, -5, -3, -1, 2, 4, 6, 8, 10$.

SEE ALSO:

[Add the Related List to the Service Appointment Layout](#)

[Create an Appointment Bundle Restriction Policy](#)

[Default Appointment Bundle Policy](#)

[Appointment Bundle Sort Policy Fields](#)

Create an Appointment Bundle Restriction Policy

Use an appointment bundle restriction policy to define restriction fields so that only service appointments with the same field values can be bundled together. Use the default policy, or create multiple restriction policies. For automatic bundling, you must have at least one restriction policy.

1. If your service appointments have custom fields, make sure to give the fields read access. See [Appointment Bundling Limitations](#).
 - a. From Setup, in the Quick Find box, enter *users*, and then select **Permission Sets**.
 - b. Click **Field Service Integration**.
 - c. Click **Object Settings**.
 - d. Click **Service Appointment**.
 - e. For each custom field, select **Read Access**.
2. In the Appointment Bundle Policy, go to the Related tab.
3. In the Appointment Bundle Restriction Policies panel, click **New**.
4. Give the policy a unique name.
5. For Restriction Field Name, select the bundle member service appointment field used to apply the restriction.

Considerations:

- Only service appointments with the same value can be bundled together.
 - The fields in the list are service appointment fields, not work order fields. The only exception is Skill Requirements, which is a work order field.
 - Unsupported lookup fields don't appear in the list of fields for selection.
6. To allow bundling service appointments that have an empty restriction field with service appointments that have a value in the restriction field, select **Allow Empty**.
 7. To apply this restriction with manual bundling, select **Restrict in Manual Mode**.
 8. If the Restriction Field Name is of type Date/Time, you can restrict the bundle based on the calendar date rather than the time of day by selecting **Restrict by Date Only**.
 9. To apply this restriction to automatic bundling, select **Restrict in Automatic Mode**.
 10. Save your changes.

SEE ALSO:

- [Create an Appointment Bundle Sort Policy](#)
- [Default Appointment Bundle Policy](#)
- [Appointment Bundle Restriction Policy Fields](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 items:

- [Customize Application](#)

Create an Appointment Bundle Propagation Policy

Create a policy to determine when and how the bundle service appointment updates the fields of the bundle member service appointments. And you can create multiple propagation policies for each bundle policy. Each propagation policy controls how one bundle member service appointment field is populated.

1. If your service appointments have custom fields, make sure to give the fields read and edit access. See [Appointment Bundling Limitations](#).
 - a. From Setup, in the Quick Find box, enter `users`, and then select **Permission Sets**.
 - b. Click **Field Service Integration**.
 - c. Click **Object Settings**.
 - d. Click **Service Appointment**.
 - e. For each custom field, select **Read Access** and **Edit Access**.
2. In the Appointment Bundle Policy, go to the Related tab.
3. In the Appointment Bundle Propagation Policies panel, click **New**.
4. Under Information:
 - a. Give the policy a unique name.
 - b. Select at least one option for whether the bundle member service appointments' fields are updated when they're added to or removed from the bundle or are unbundled.
5. Under Propagation Settings:
 - a. In Bundle Member Field Name, select the field that's populated by this policy. The fields in the list are service appointment fields, not work order fields. The only exception is Skill Requirements, which is a work order field.
Don't configure the Status field in a propagation policy. Use the Appointment Bundle Config to control how the Status field behaves.
 - b. Complete the remaining fields according to the type of field selected in Bundle Member Field Name.
6. Save your changes.

[Propagation Configurations](#)

Configure your propagation policies according to the selected Bundle Member Field Name type.

SEE ALSO:

[Appointment Bundle Propagation Policy Fields](#)

Propagation Configurations

Configure your propagation policies according to the selected Bundle Member Field Name type.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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USER PERMISSIONS

To create tasks:

- [Customize Application](#)

Bundle Member Field Type—Boolean


Fields to Populate	Result
Bundle Field Name	Replace the checkbox selection in the bundle member service appointments according to the checkbox selection in the bundle service appointment.
Constant Value: Enter <i>True</i> or <i>False</i>	Replace the checkbox selection in the bundle member service appointments according to the entered constant value of true or false.
Add Constant Value: Select the checkbox AND Constant Value: Enter <i>True</i> or <i>False</i>	Check the setting in the bundle service appointment and the entered Constant Value. If one of them is False, set the checkbox in the bundle member service appointments to False.

Bundle Member Field Type—Date

Fields to Populate	Result
Bundle Field Name	Replace the bundle member service appointments' date field value with the bundle service appointment date field.
Constant Date Value: Select Null, Now, End of Day, or Start of Day	Replace the bundle member service appointments' date field value with the selected Constant Date Value.
Add Constant Value: Select the checkbox AND Constant Date Value: Select Null, Now, End of Day, or Start of Day AND Additional Constant Value: Enter the number of days, hours, and minutes	Take the selected Constant Date Value, add the entered Additional Constant Value, and populate the selected bundle member service appointments' field with this value.

Bundle Member Field Type—Lookup

Fields to Populate	Result
Bundle Field Name	Replace the bundle member service appointments' field value with the bundle service appointment field value.
Constant Value: Enter text	Replace the bundle member service appointments' field value with the entered ID.
Add Constant Value: Select the checkbox AND Constant Value: Enter text	Add the bundle service appointment's field value to the bundle member service appointments' field value.

 **Note:** Unsupported lookup fields don't appear in the list of fields for selection.

Bundle Member Field Type—Numeric

Fields to Populate	Result
Bundle Field Name	Replace the bundle member service appointments' field value with the bundle service appointment field value.
Constant Value: Enter a number	Replace the bundle member service appointments' field value with the entered Constant Value.
Add Constant Value: Select the checkbox AND Constant Value: Enter a number	Add the bundle service appointment's field value to the bundle member service appointments' field value.

Bundle Member Field Type—Picklist

Fields to Populate	Result
Bundle Field Name	Replace the bundle member service appointments' field value with the bundle service appointment field value.
Constant Value: Enter a picklist value	Replace the bundle member service appointments' field value with the entered Constant Value.

Bundle Member Field Type—String

Fields to Populate	Result
Bundle Field Name	Replace the bundle member service appointments' field value with the bundle service appointment field value.
Constant Value: Enter text	Replace the bundle member service appointments' field value with the entered Constant Value.
Add Constant Value: Select the checkbox AND Constant Value: Enter text	Add the bundle service appointment's field value to the bundle member service appointments' field value.

SEE ALSO:

[Create an Appointment Bundle Config](#)

Create an Appointment Bundle Aggregation Policy

Use the default aggregation policies, or create policies to determine when and how bundle member service appointments update the bundle service appointment fields. And you can create multiple aggregation policies for each bundle policy. Each aggregation policy controls how one bundle service appointment field is populated.

1. If your service appointments have custom fields, make sure to give the fields read and edit access. See [Appointment Bundling Limitations](#).
 - a. From Setup, in the Quick Find box, enter `users`, and then select **Permission Sets**.
 - b. Click **Field Service Integration**.
 - c. Click **Object Settings**.
 - d. Click **Service Appointment**.
 - e. For each custom field, select **Read Access** and **Edit Access**.
2. In the Appointment Bundle Policy, go to the Related tab.
3. In the Appointment Bundle Aggregation Policies panel, click **New**.
4. Under Information:
 - a. Give the policy a unique name.
 - b. To set the order that triggers this aggregation, in Aggregation Order, enter a unique number. For example, enter `1` to trigger this policy first.
 - c. In Recordset Filter Criteria, enter a recordset filter criteria to aggregate the bundle members. You can aggregate only the service appointments that meet this criteria.
 - d. If you don't want this aggregation policy to apply to bundle members that are added after the bundle is created, select **Aggregate only when the bundle is created**.
5. Under Aggregation Settings:
 - a. In the Bundle's Target Field, select a bundle service appointment field. This field is populated by the aggregation. The fields in the list are service appointment fields, not work order fields. The only exception is Skill Requirements, which is a work order field. Don't configure the Status field in an aggregation policy. Use the Appointment Bundle Config to control how the Status field behaves.
If you select a formula field in the Source Field, select a matching field type in the Bundle's Target Field.
 - b. Select an aggregation action that works with the type of field selected for the bundle's target field.
 - c. Complete the remaining fields according to the type of field selected for the bundle's target field.
6. Save your changes.

[Aggregation Configurations](#)

You can create a custom aggregation for any bundle service appointment field.

SEE ALSO:

- [Create Recordset Filter Criteria for Bundling Appointments](#)
- [Appointment Bundle Aggregation Policy Fields](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 items:

- [Customize Application](#)

Aggregation Configurations

You can create a custom aggregation for any bundle service appointment field.

Aggregation Field Type—Boolean

Aggregation Actions	Fields to Populate	Result
Apply OR operation	Source Field	If the selected bundle member field's value for any bundle members is set to true, set the selected bundle field's value to true. If not, set it to false.
Apply AND operation	Source Field	If the selected bundle member field's value for all bundle members is set to true, set the selected bundle field's value to true. If not, set it to false.
Set constant value	Constant Value—Enter <i>True</i> or <i>False</i>	Ignore the values of the bundle member's field, and set the selected bundle's field to this value (true or false).
Has at least one bundle member in filter criteria	Recordset Filter Criteria	If at least one bundle member meets the recordset filter criteria, set the selected bundle's field value to true. If not, set it to false.


Aggregation Field Type—Date

Aggregation Actions	Fields to Populate	Result
Find earliest	Source Field	Find the bundle member that has the earliest date, and enter this date in the selected bundle field.
Find latest	Source Field	Find the bundle member that has the latest date in the selected bundle member field, and enter this date in the selected bundle field.
Set constant value	Constant Date Value—Select Null , Now , End of Day , or Start of Day	Ignore the values of the bundle member's field, and set the selected bundle's field to this constant value (Null, Now, End of Day, or Start of Day).
Sum based on bundle fields	<ul style="list-style-type: none"> • Source Field • Constant Value—in hours OR <ul style="list-style-type: none"> • Source Field 	Take the selected bundle field's value, add the constant value, and enter this date in the selected bundle field. OR

Aggregation Actions	Fields to Populate	Result
	<ul style="list-style-type: none"> Additional Source Field (must be a numeric field in hours) 	Take the selected bundle field's value, add the additional bundle field's value, and enter this date in the selected bundle field.
Subtract based on bundle fields	<ul style="list-style-type: none"> Source Field Constant Value—in hours OR <ul style="list-style-type: none"> Source Field Additional Source Field (must be a numeric field in hours) 	<p>Take the selected bundle field's value, subtract the entered constant value, and enter this date in the selected bundle field.</p> OR <p>Take the selected bundle field's value, subtract the additional bundle field's value, and enter this date in the selected bundle field.</p>

Aggregation Field Type—Lookup

Aggregation Actions	Fields to Populate	Result
Find minimum	Source Field	Find the bundle member that has the lowest ID, and enter this value in the selected bundle field.
Find maximum	Source Field	Find the bundle member that has the highest ID, and enter this value in the selected bundle field.
Set constant value	Constant Value—Enter an ID	Enter this ID in the selected bundle's field.

 **Note:** Unsupported lookup fields don't appear in the list of fields for selection.

Aggregation Field Type—Numeric

Aggregation Actions	Fields to Populate	Result
Find minimum	Source Field	Find the bundle member that has the lowest numeric value, and enter this value in the selected bundle field.
Find maximum	Source Field	Find the bundle member that has the highest numeric value, and enter this value in the selected bundle field.
Set constant value	Constant Value	Ignore the values of the bundle member's field, and enter this constant value in the selected bundle's field.

Aggregation Actions	Fields to Populate	Result
<p>Set downscaled duration</p> <p>You can apply this action to any numeric field, not just duration fields.</p>	<ul style="list-style-type: none"> • Downscale Sorting Direction • (Optional) Maximum Bundle Duration • Source Field • At least one Appointment Bundle Aggregation Duration Downscale form (see Create Appointment Bundle Aggregation Duration Downscals) 	<ol style="list-style-type: none"> 1. Sort the bundle members according to the selected source field in the direction defined in the Downscale Sorting Direction field. 2. Take the bundle members in the range defined by the From Bundle Member Number and To Bundle Member Number fields (in the Appointment Bundle Aggregation Duration Downscals form). 3. Calculate the reduction applied to each bundle member according to the Percentage of Reduction field. 4. For each bundle member, compare the result to the Max Reduction field. <ul style="list-style-type: none"> • If the max reduction is higher, reduce the result of the Percentage of Reduction calculation from the duration of the bundle member. • If the max reduction is lower, reduce the value of the Max Reduction field from the duration of the bundle member. 5. If you have defined additional Aggregation Duration Downscaling forms, also consider them. 6. Sum the results of all the calculated durations of the bundle members. 7. Compare the calculated bundle duration result to the value entered in the Maximum Bundle Duration field. If the maximum bundle duration is lower, use this value.
<p>Subtract based on bundle fields</p>	<ul style="list-style-type: none"> • Source Field • Constant Value <p>OR</p> <ul style="list-style-type: none"> • Source Field • Additional Source Field (must be a numeric field in hours) 	<p>Take the selected bundle field's value, subtract the entered constant value, and enter this number in the selected bundle field.</p> <p>OR</p> <p>Take the selected bundle field's value, subtract the additional bundle field's value, and enter this number in the selected bundle field.</p>

Aggregation Actions	Fields to Populate	Result
Sum based on bundle fields	<ul style="list-style-type: none"> Source Field Constant Value OR <ul style="list-style-type: none"> Source Field Additional Source Field (must be a numeric field in hours) 	<p>Take the selected bundle field's value, add the entered constant value, and enter this number in the selected bundle field.</p> OR <p>Take the selected bundle field's value, add the additional bundle field's value, and enter this number in the selected bundle field.</p>
Sum based on bundle members	<ul style="list-style-type: none"> Source Field (Optional) Constant Value 	<p>Sum the values of the selected bundle member field, and enter this number in the selected bundle field.</p> OR <p>Add the constant value to each bundle member's field value, sum the values, and enter this number in the selected bundle field.</p>
Count Bundle Members in Filter Criteria	Recordset Filter Criteria	Count how many bundle members answer the recordset filter criteria, and enter this number in the selected bundle field.

Aggregation Field Type—Picklist

Aggregation Actions	Fields to Populate	Result
Find minimum	Source Field	Find the bundle member that has the lowest alphabetic or numeric value, and enter this value in the selected bundle field.
Find maximum	Source Field	Find the bundle member that has the highest alphabetic or numeric value, and enter this value in the selected bundle field.
Set constant value	Constant value—According to the values in this field's picklist	Use the entered constant value for the selected bundle field's value.


Aggregation Field Type—Picklist-Multi

Aggregation Actions	Fields to Populate	Result
Clear value	—	Leave the selected bundle's field empty.
Intersect	Source Field	Take only the values from the bundle member field that appear in all of the bundle members, and list them in the bundle's field.

Aggregation Actions	Fields to Populate	Result
Unite	Source Field	Take all the values from the bundle member's field and list them in the bundle's field.

Aggregation Field Type—Skills, Bundle's Target Field—Skill Requirements

Aggregation Actions	Fields to Populate	Result
Clear value	—	Leave the selected bundle's field empty.
Intersect	—	Take only the skills that appear in all the bundle members, and list them in the bundle's field. The level for each skill is taken from the bundle member with the lowest level. Null is considered the lowest level.
Unite	—	Take all the skills from the bundle members and list them in the bundle's field. The level for each skill is taken from the bundle member with the lowest level. Null is considered the lowest level.

 **Note:** If the skills are updated in a bundle member service appointment after the bundle is created, the skills aren't aggregated to the bundle service appointment. Update the bundle service appointment's skills manually.

Aggregation Field Type—String

Aggregation Actions	Fields to Populate	Result
Find minimum	Source Field	Find the bundle member that has the lowest alphabetic value, and enter this value in the selected bundle field.
Find maximum	Source Field	Find the bundle member that has the highest alphabetic value, and enter this value in the selected bundle field.
Set constant value	Constant Value	Enter this constant value in the selected bundle's field.
Sum based on bundle members	<ul style="list-style-type: none"> Source Field (Optional) Allow the same value to appear more than once 	List the values of the selected bundle member field in the selected bundle field. To allow the same value to appear more than once, select Allow the same value to appear more than once .

Aggregation Actions	Fields to Populate	Result
		<p>Appointment Bundling Limitations:</p> <ul style="list-style-type: none"> • Make sure that the length of the string field can contain enough values to populate the bundle service appointment field. From Setup, open the Object Manager. Click Service Appointment, and then click Fields & Relationships. Edit the length under Text Options. • If you select to allow the same value to appear more than once, make sure that the field's configuration settings support it. From Setup, open the Object Manager. Click Service Appointment, and then click Fields & Relationships. Edit the relevant field, and deselect Do not allow duplicate values.
Sum based on bundle fields	<ul style="list-style-type: none"> • Source Field • Additional Source Field <p>OR</p> <ul style="list-style-type: none"> • Constant Value • Additional Source Field 	<p>Take the selected bundle field value, add the additional bundle field value, and enter this value in the selected bundle field.</p> <p>OR</p> <p>Take the entered constant value, add the additional bundle field value, and enter this value in the selected bundle field.</p>

SEE ALSO:

[Create an Appointment Bundle Config](#)

[Default Appointment Bundle Policy](#)

Create Appointment Bundle Aggregation Duration Downscalers

Account for one-time tasks that are part of a bundle by downscaling the duration of the bundle member service appointments. You can create multiple aggregation duration downscalers.

1. If your service appointments have custom fields, make sure to give the fields read and edit access. See [Appointment Bundling Limitations](#).
2. Open an appointment bundle aggregation policy that has Aggregation Action defined as Set downscaled duration.
3. In the Appointment Bundle Aggregation Policy, go to the Related tab.
4. In the Appointment Bundle Aggregation Duration Downscalers panel, click **New**.
5. Give the policy a unique name.
6. For From Bundle Member Number, enter the first bundle member's number that the downscale applies to.
7. For To Bundle Member Number, enter the last bundle member's number that the downscale applies to. To always downscale to the last bundle member, leave this field empty.
8. Enter the percentage of reduction.
9. For Max Reduction, enter the maximum reduction for a bundle member service appointment, in minutes.
10. Save your changes.



Example: A printer maintenance company must fix multiple printers in the same office building. For the first service appointment, the mobile worker needs time for parking, passing the building's security clearance, organizing the tools, and then fixing the printer. But when the mobile worker gets to the second service appointment, they can go straight to fixing the printer. In this scenario, to get a better estimate of the bundle's duration, configure the downscaling to start from the second bundle member.



Important: If you define aggregation duration downscalers where the service appointments overlap and include Max Reduction values, it can lead to inaccurate results. See [Appointment Bundling Limitations](#).

SEE ALSO:

[Create an Appointment Bundle Policy](#)

[Appointment Bundle Aggregation Duration Downscale Fields](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 items:


- Customize Application

Create Appointment Bundle Policy Service Territories

Define one service territory for each bundle policy. Only service appointments in the defined service territory can be added to the bundle. For automatic bundling, you need at least one Appointment Bundle Policy Service Territory. For manual bundling, Appointment Bundle Policy Service Territories are optional.

 **Important:** Although you can define more than one service territory for a bundle policy, it isn't recommended. If you do define more than one service territory for a bundle policy, make sure that the enhanced scheduling and optimization setting for all the service territories matches. If this setting is enabled in one service territory and disabled in another, the bundles created with the bundle policy can't be updated. See [Appointment Bundling Limitations](#).

1. In the Appointment Bundle Policy, go to the Related tab.
2. In the Appointment Bundle Policy Service Territories panel, click **New**.
3. Give the policy a unique name.
4. Select the service territory for the bundle policy.

 **Note:** You can bundle together only service appointments with the same service territory in the same time zone. See [Appointment Bundling Limitations](#).

5. Save your changes.

SEE ALSO:

[Appointment Bundle Policy Service Territory Fields](#)

Create an Appointment Bundle Config

Use the default configuration, or edit it to determine the status behavior when bundling and unbundling service appointments. These configuration settings apply to all your bundles.

 **Note:** The bundle config must match the configured Status Transitions. See [Customize the Service Appointment Life Cycle](#).

1. From the App Launcher, open **Appointment Bundle Configs**.
If you don't see Appointment Bundle Configs in the App Launcher:
 - a. From Setup, in the Quick Find box, enter `users`, and then select **Profiles**.
 - b. On the Salesforce admin profile, click **Edit**.
 - c. From Profile Detail, click **Edit**.
 - d. Under Tab Settings, set the bundle tabs to **Default On**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 items:

- Customize Application

EDITIONS

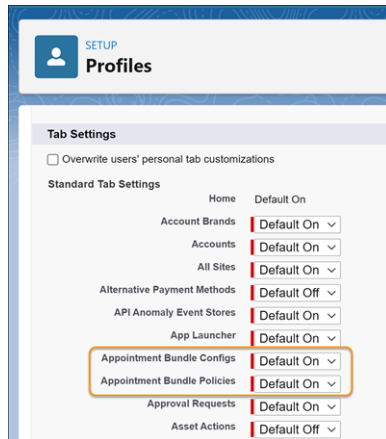
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create items:

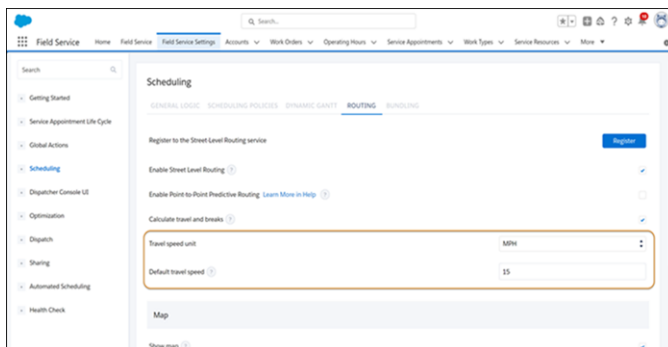
- Customize Application



- e. Save your changes and refresh your browser.
2. On the Appointment Bundle Configs page, edit the default bundle configuration.
3. Under General Settings:
 - a. Give the bundle a unique name.
 - b. Select the statuses in which you can add or remove service appointments from a bundle. If you don't select any statuses, appointments with any status can be added or removed from a bundle. We recommend selecting at least the **None** and **Scheduled** statuses.
 - c. To add travel time between the bundle member service appointments to the bundle's duration according to their sort order, select **Add travel time to bundle duration**.

Considerations:

- Travel time is added only if the bundle member service appointments include coordinates and the travel speed is set. To make sure the values are set for travel speed unit and default travel speed, open Field Service Settings, select **Scheduling**, and then select **Routing**.



- The entered default travel speed is used for calculating the travel time between bundle member service appointments, even if travel speed is specified for the service resources assigned to the service appointments.
- The distance between the service appointments is based on aerial distance.
- Travel time between the bundle member service appointments is also affected by the service resource's efficiency. See [Appointment Bundling Limitations](#).

Example: A service resource is assigned to a bundle that includes two service appointments of two hours each and a travel time between them of one hour. If the service resource doesn't have a defined efficiency, the duration of the bundle is 2 hr (service appointment A) + 1 hr (travel time) + 2 hr (service appointment B) = 5 hr. If the service resource has a defined efficiency of 0.5, the duration of the bundle is: 1 hr (service appointment A) + 0.5 hr (travel time) + 1 hr (service appointment B) = 2.5 hr.

4. Under Unbundling Settings:
 - a. Select the status of a service appointment after it's removed from a bundle, and select the statuses you don't want to update.
 - b. To prevent automatic unbundling, leave the Criteria for Automatic Unbundling field blank. Otherwise, enter the recordset filter criteria.
5. Under Status Transition Settings, select which bundle service appointment statuses to add or not propagate.
6. Save your changes.

SEE ALSO:

[Propagation Configurations](#)

[Aggregation Configurations](#)

[Create Recordset Filter Criteria for Bundling Appointments](#)

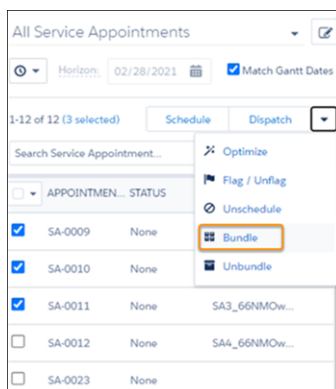
[Appointment Bundle Config Fields](#)

[Modify a Field Service Bundle](#)

Test Your Appointment Bundling Configuration

After completing the configuration steps for appointment bundling, test it in Field Service.

1. Open Field Service.
2. From the appointment list, select one or two service appointments.
3. From the global actions list, select **Bundle**.



4. In the Bundle Appointments window, select **Create bundle**, and then select a bundle policy.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To manage bundles:

- Field Service Dispatcher



To update configuration:

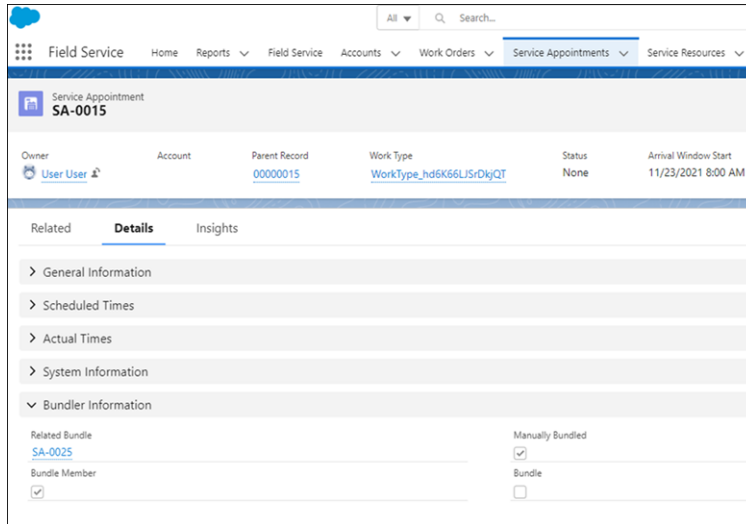
- Customize Application

The screenshot shows the 'Bundle Appointments' interface. At the top, there's a header 'Bundle Appointments'. Below it, there's a section for '1 Service Appointments' with a table. The table has columns: SA Number, Duration In Minutes, Address, Early Start, Due Date, Work Type, Account, and Required Skills. There is one row with SA Number SA-0202, Duration In Minutes 60, and Due Date 2/25/2023 4:18 AM. Below the table, there's a 'Create Bundle' section with a dropdown menu for 'Bundle Policy' and a button 'Add to Existing Bundle'. At the bottom right, there are 'Cancel' and 'Save' buttons.

5. Save the bundle.
6. If you get error messages, resolve the configuration issues accordingly.
7. If you get a system error message about your remote site settings:
 - a. Copy the URL from the error message.
 - b. From Setup, in the Quick Find box, enter *security*, and then select **Remote Site Settings**.
 - c. Click **New Remote Site**.
 - d. Enter a name, for example *AppointmentBundling*.
 - e. For Remote Site URL, enter the URL that you copied from the error message.
 - f. Save the remote site.

When a bundle is created:

- Appointment list—The new bundle service appointment appears in the appointment list.
 -  Indicates that the appointment is a bundle service appointment. When the bundle is scheduled, the icon also appears on the Gantt.
 -  Indicates that the appointment is a bundle member service appointment.
- Gantt—If all the service appointments in the bundle are scheduled, assigned to the same resource, and on the same day, the bundle is scheduled on the Gantt. If not, the bundle must be scheduled.
- Bundle tab of the bundle service appointment's details window—If an Appointment Bundle Sort Policy is defined, the service appointments are sorted according to the policy. If an Appointment Bundle Sort Policy isn't defined, the service appointments are sorted according to their due date in ascending order.
- Service Appointments tab—Shows the bundle information related to each bundle service appointment and bundle member service appointment. This information can't be edited.



The Bundle Information fields can't be selected to display in a list view. See [Appointment Bundling Limitations](#)

Appointment Bundling Limitations

Review the limitations of Appointment Bundling.

Aggregation Duration Downscalers

- When you define more than one aggregation duration downscale, they aren't evaluated in any particular order. If your duration downscalers include overlapping service appointments and include Max Reduction values, it can lead to inaccurate results.
- Custom fields for service appointments used in aggregation duration downscalers must have read and edit access.

See [Create Appointment Bundle Aggregation Duration Downscalers](#).

Aggregation policies

- Custom fields for service appointments used in aggregation policies must have read and edit access.
- For the **Allow the same value to appear more than once** option, make sure that **Do not allow duplicate values** isn't selected in the field's configuration settings.
- For string aggregations with the Sum Based on Bundle Members action, make sure that the length of the string field can contain enough values to populate the bundle service appointment field.

See [Create an Appointment Bundle Aggregation Policy](#).

Bundle Member Service Appointments related list

- The Sort By option is set to Default. Other options aren't supported.
- The expanded view of the related list indicates that the appointments are sorted by due date, even if the order is determined by the Appointment Bundle Sort Policy.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- Using the arrow that changes the order of the appointments according to a specific column overrides the order determined in the Appointment Bundle Sort Policy.

See [Set Up Service Appointment Bundling for Mobile Workers](#).

Bundle policies

- The Allow Scheduling Dependencies in Bundle field isn't supported.
- You can create more than one service territory policy for a bundle policy, but it isn't recommended. The dispatcher can only bundle together service appointments with the same service territory in the same time zone. If you define more than one service territory for a bundle policy, make sure that the enhanced scheduling and optimization setting in all the service territories matches. If the setting is enabled in one service territory and disabled in another, the bundles created with the bundle policy can't be updated.
- You can delete a bundle policy even if it's already in use. However, you can't perform actions on a bundle that was created using that policy, such as add or remove bundle members or unbundle a bundle.
- Custom fields for service appointments used in bundle policies must have read access.

See [Create an Appointment Bundle Policy](#).

Localization

If you change the API name of the None status after enabling Appointment Bundling, you must refresh the cache. To refresh the cache, edit and save your Bundle Config or any bundle policy.

Propagation policies

Custom fields for service appointments used in aggregation policies must have read and edit access. See [Create an Appointment Bundle Propagation Policy](#).

Recordset filter criteria

Inactive recordset filter criteria aren't supported. See [Create Recordset Filter Criteria for Bundling Appointments](#).

Restriction policies

Custom fields for service appointments used in sort policies must have read access. See [Create an Appointment Bundle Restriction Policy](#).

Scheduling

Bundle member service appointments can't be part of complex work with scheduling dependencies. See [Create a Field Service Bundle Manually](#).

Service Appointments list view

The Bundle Information fields from the service appointment's details can't be selected to display in a list view. See [Create a Field Service Bundle Manually](#) and [Test Your Appointment Bundling Configuration](#).

Sort policies

Custom fields for service appointments used in sort policies must have read access. See [Create an Appointment Bundle Sort Policy](#).

Travel time

- Travel time between the bundle member service appointments is also affected by the service resource's efficiency.
- When you unbundle a bundle that includes travel time, the line that indicates travel between service appointments doesn't appear on the Gantt.

See [Create an Appointment Bundle Config](#).

SEE ALSO:

[Create an Appointment Bundle Policy](#)

Setting Field Service Key Performance Indicators

Key Performance Indicators (KPIs) are crucial when scoping your business's needs and aligning them with what Field Service provides. For example, KPIs can help you make smart business decisions by setting efficient schedules and sending workers with the right skills and tools for the job.

Implementing KPI Improvements

The mobile worker needs to be equipped with both information, knowledge and parts (when needed):

- Where the job is.
- History of the customer.
- History of any assets.
- How to complete all the steps of the work, or have the ability to collaborate remotely with another resource.
- Checklists and work plans for the necessary steps required.
- Visibility into all safety protocols and compliance requirements.

There are six provided metrics to measure progress, from the tactical – such as first-time fix rate and time to site – to the strategic: customer satisfaction.

Reduce Call Volume

If your dispatchers are still fielding a high volume of calls with scheduling requests and status updates, implement the following:

- **Self-service capabilities:** Enable self-service through a customer portal on your site or your customer-facing app.
- **Automated notifications:** Keep customers in the know with automated updates via email, SMS, or the customer portal when a mobile worker is nearby or if there is a delay.
- **Live tracking:** Give customers the ability to see where a mobile worker is on a map with an arrival calculation, similar to what you would see on a ride-sharing app.

Improve Time to Site

If you've implemented a connected solution but mobile workers are still not getting to their job sites on time, leverage the following:

- **Route optimization:** Help dispatchers effectively manage each location, find the shortest routes, and facilitate planning journeys with a full map view from their screen.
- **Intelligent planning:** Eliminate dispatcher bias by using intelligence with a full view of the field to assign (and reassign) the right mobile worker for each job based on location, availability, skill set, and equipment.

- **Geolocation tracking:** Embed GPS technology into the field service app to navigate mobile workers to the shortest route to site and give dispatchers a bird's eye view of resources in the field.

Boost Number of Jobs Per Day

Ensure dispatchers are using workforce analytics to assign jobs based on a set of business rules:

- Location
- Skill set
- Worker availability
- Equipment availability
- Inventory on hand

Increase First-Time Fix Rates

If mobile workers still struggle with first-visit resolution, ensure they have the best mobile capabilities in the field:

- **Consolidated information:** Give mobile workers access to job information, customer data, task details, asset history, connected device insight, and schedules from their mobile devices to prepare them before they even walk through the door.
- **Offline and online capabilities:** With offline capabilities, mobile workers can download customer information ahead of time and log updates offline that sync once reconnected to data or Wi-Fi.
- **Ongoing support:** Empower mobile workers with helpful resources for more complex cases, such as knowledge articles and video tutorials available from their app.

Reduce Costs

To reduce costs, consider the following:

- **Faster time to invoice:** By giving mobile workers a digital notice through their app, job completion is confirmed from their mobile device, and customers are invoiced faster.
- **Flow of processes:** Optimize field service with a simple flow of processes that require minimal effort through field service automation.
- **Job status:** Mobile workers log updates before, during, and after appointments to give dispatchers a real-time view of job status and effectively create planning journeys.

Improve Customer Satisfaction

You can close the feedback loop with a short survey, open-ended questionnaire, or direct outreach on everything from appointment booking to the experience with a mobile worker.

Set Up for Product Warranties in Field Service

To have new assets automatically pick up the standard warranty for a product, set up a flow, process builder, or trigger.

SEE ALSO:

- [Build a Flow](#)
- [Create a Process](#)
- [Triggers](#)
- [Record Product Warranties in Field Service](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Set Up Product Service Campaigns in Field Service

If your Salesforce org was created before Spring '21, add the Product Service Campaign Item related list to Product Service Campaign.

SEE ALSO:

- [Manage Product Service Campaigns in Field Service](#)
- [Add the Files Related List to Page Layouts](#)
- [Manage Product Service Campaigns in Field Service](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Set Up Field Service Asset Availability and Reliability Reporting

Get information on asset availability and reliability by recording details of asset downtime in Field Service.

1. From Setup, enter *Profiles* in the *Quick Find* box, then select **Profiles**.
2. Click the profile you want to provide with access.
3. Click **Edit**.
4. Under Administrative permissions, select **Field Service Standard**.
5. Under Standard Object Permissions, give read or read/write access to **Assets**. Save your changes.
6. Under Field-Level Security, click **View** next to Asset.
7. Click **Edit** and grant:
 - a. read access to the Availability, Reliability, Cumulative Downtime, and Cumulative Unplanned Downtime fields.
 - b. read/write access to the Average Uptime Per Day, Uptime Record End Date, and Uptime Record Start Date fields.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

8. Save your changes.
9. Add the Average Uptime Per Day, Uptime Record End Date, and Uptime Record Start Date fields to the Asset page layout. Also add your choice of Availability, Reliability, Cumulative Downtime, and Cumulative Unplanned Downtime fields.

SEE ALSO:


[Track Availability and Reliability in Field Service](#)

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.

[Add the Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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, customize, or publish an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

[Provide Access to Asset Availability and Reliability Information in Field Service](#)

Let Experience Cloud site users view or record asset downtime details and view information on asset availability and reliability.

SEE ALSO:

[Set Up and Manage Experience Cloud Sites](#)

[Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates](#)

[Visualforce Page Component](#)

[Field Service Objects](#)

[Guidelines for Setting Up Field Service Contractors](#)

[Guidelines for Setting Up Field Service Contractors](#)

[Define Capacity-Based Resources](#)

Add the Field Service 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.



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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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, customize, or publish an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To create a permission set:

- Manage Profiles and Permission Sets


To assign a permission set license:

- Manage Users

To use the dispatcher console in a site:

- Partner Community license and Field Service Dispatcher permission set 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 [Complex Work in Field Service](#)—or Live Gantt updates.

SEE ALSO:

- [Customize the Field Service Dispatcher Console](#)
- [Work in the Field Service Dispatcher Console Gantt](#)

Provide Access to Asset Availability and Reliability Information in Field Service

Let Experience Cloud site users view or record asset downtime details and view information on asset availability and reliability.

1. From Setup, enter *Profiles* in the *Quick Find* box, then select **Profiles**.
2. Click the Experience Cloud site user profile you want to provide with access.
3. Click **Edit**.
4. Under Administrative permissions, select **Field Service Standard**.
5. Under Standard Object Permissions, give read or read/write access to Assets. Save your changes.
6. Under Field-Level Security, click **View** next to Asset.
7. Click **Edit** and grant read access to the Availability and Reliability fields. Click Save your changes.

 **Note:** Access to asset downtime related list is not available for guest users.

SEE ALSO:

- [Track Availability and Reliability in Field Service](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Set Up Visual Remote Assistant for Field Service

Promote sustainability using Visual Remote Assistant for Field Service, boost sales, and improve efficiency while reducing costs by delivering service from anywhere.

Watch the video to learn about Visual Remote Assistant from an agent's perspective.

 [Watch a video](#)

Watch the video to learn how Visual Remote Assistant can impact your customer engagement practices.

 [Watch a video](#)

Customers prefer to resolve their issues effortlessly, right now, and without bringing technicians on site. Businesses and workers are concerned for employee safety. Remote sales people, call center agents or field technicians can solve a customer's problem visually, while guiding them on-screen through each step and verifying a successful resolution.

Visual sessions imagery is retained for future reference and becomes an integral part of the company's customer journey assets.

- No app download or additional software installation is required.
- Customers launch the visual session in a mobile web browser by clicking a link sent to them via SMS, email or in a digital communications platform message.
- Visual Remote Assistant works even on low or variable bandwidth connections to preserve the visual session.

If you're a Salesforce admin or a Salesforce implementer, these instructions and reference resources are for you. Follow the sections in sequence to ensure optimal use of Visual Remote Assistant for superior customer experience. Consider involving additional stakeholders who are in charge of new systems implementations.

Install Visual Remote Assistant

To use the Visual Remote Assistant, install the [managed package](#). See [Install a Package](#).

To configure Visual Remote Assistant with other Salesforce products, see [Visual Remote Assistant for Salesforce](#).

 **Note:** Make sure to select the All Users option in the installation package.

Roll Out Visual Remote Assistant

A successful rollout ensures full business KPI impact potential, and allows for optimal processes redesign and business outcomes. Two rollout approaches are available.

- Simplified, quick onboarding, suitable for a very small number of Visual Remote Assistant users. See the essential Visual Remote Assistant self-learning [Trailhead module](#) (login required).
- Thorough, methodical, and fully customizable, suitable for more complex customer journeys and larger number of licenses. See:
 - [Complete onboarding methodology guide](#)
 - [Customizable agent training slide deck](#)

Advanced Visual Remote Assistant Implementations

Access these resources to learn more about verticals, use cases, and Salesforce products together with Visual Remote Assistant such as flows, scheduling, Community Portal, Experience Cloud site. Each link covers a different dimension of extended Visual Remote Assistant implementations:

- [Empower customers with real-time visual support](#)
- [Deliver Service Anytime, Anywhere With Visual Remote Assistance](#)

EDITIONS


Available in: Lightning Experience

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

- [Drive Revenue with VRA Solutions](#) using this vertical by use-case matrix

Visual Remote Assistant Community in Trailhead

The Visual Remote Assistant Trailhead group is the community's gate. Visual Remote Assistant users, admins, and partners can find responses to their questions, speak with Salesforce's experts, suggest ideas, and get guidance and advice. Trailhead is regularly updated and enriched to make sure that Visual Remote Assistant can enhance customer experience throughout their journey. See the [Visual Remote Assistant Trailhead group](#).

 **Important:** To use Visual Remote Assistant, you must provide your own internet or package of data and phone line. Neither are included in the managed package.

SEE ALSO:

[Admin Manual: Visual Remote Assistant](#)

[Agent Manual](#)

[Installation & Configuration Manual](#)

[Product Description](#)

[Security & Privacy Document](#)

[Trailhead: Visual Remote Assistant](#)

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 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 Passed, Failed: Warning, or Failed: Critical. A Failed: Critical result can cause immediate performance degradations or system malfunction. A Failed: Warning result can impact performance or indicate a configuration that goes against our 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, click **Run Tests** to view the results of the Field Service Health Check run.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To run Field Service Health Check:

- Salesforce Field Service Admin Permissions

Health Check

Compare your configuration against Field Service best practices to maximize performance. [Learn more about the tests.](#)

General Validations **Horizon Based Validations**

Test general settings and configurations that could impact performance.

Total number of tests: 10

[Refresh Results](#)

❌

Failed: Critical

3

⚠️

Failed: Warning

1

✅

Passed

6

Result ↑	Occurrences	Category	Issue Description	Recommendation	Actions
❌ Failed: Critical	7	Permissions Set Validation	Permission Sets are Out of Date	Update your permission sets.	▼
❌ Failed: Critical	1	Scheduling Policy	Scheduling Policy with Insufficient Work Rules	Add more work rules to your scheduling policy.	▼
❌ Failed: Critical	1	Street Level Routing	Street-Level Routing (SLR) isn't Registered	Register the SLR service.	▼
⚠️ Failed: Warning	1	Optimization	Optimization isn't active	Activate schedule optimization	▼
✅ Passed	0	Field Service Settings	'None'/'Scheduled' status categories are set as 'Pinned Status'	Unpin 'None' and 'Scheduled' statuses.	▼

- b. Under Horizon Based Validations, enter information for the scheduling horizon that you want to check, and then click **Run Tests**. Horizon-Based Validations can take a while to finish running.

Health Check

Compare your configuration against Field Service best practices to maximize performance. [Learn more about the tests.](#)

General Validations **Horizon Based Validations**

Horizon-based tests validate settings and configuration within a specific timeframe to help troubleshoot performance issues

* Horizon Start: * Horizon End:

* Service Territories


Search for the needed Service Territories

Include Service Appointments without a territory

* Scheduling Policy:

Filter services by:

[Run Tests](#)

- 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.
-  **Note:** Select only service territories that are using Enhanced Scheduling and Optimization or only service territories that aren't using Enhanced Scheduling and Optimization.
- 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.

- a. To filter the results according to their status group, click the relevant group icon.
- b. If you make changes to your configuration, click **Refresh Results**.
- c. To get more information on failed tests, select **More Info** in the Actions dropdown menu.

Set Up After Field Service Sandbox Refresh

After you refresh a sandbox for Field Service, you must verify that sandbox remote sites are active. Then configure your Salesforce sandboxes to use independent remote sites for street-level routing (SLR) and optimization services, and verify your default policies and operating hours.



This is a Field Service managed package feature.

1. Verify that sandbox remote sites are active. From Setup, in the Quick Find box, enter *Remote Site Settings*, and then select **Remote Site Settings**. Activate the FSL_GIS_SB and FSL_Optimize_SB sites. Reauthenticate your optimization user and register street-level routing.
2. Register street-level routing. To register SLR, in the Field Service Admin app, select the **Field Service Settings** tab and then select **Scheduling**. Select **Routing** and click the Register button if shown.
3. Reactivate Optimization. See [Set Up Optimization](#)
4. In the managed package Field Service Settings app, verify the following:
If you refreshed a developer sandbox, you must first create operating hours and scheduling policies and then verify.
 - a. Default Emergency Policy and Default Scheduling Policies. See [Create and Manage Scheduling Policies](#)
 - b. Default Operating Hours. See [Guidelines for Creating Operating Hours for Field Service](#)
 - c. Optimization Scheduled Jobs policy. See [Set Up and Run Optimization Jobs](#)
 - d. Scheduling Recipes Policies. See [Create Scheduling Recipes for Common Events](#)
5. Run health check. See [Test Your Field Service Configuration with Health Check](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 settings in the Field Service Admin app and Field Service Settings app:

- Field Service Admin Permission Set

To configure remote settings:


- Customize Application or Modify All Data

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.

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 or update custom report types:

- Manage Custom Report Types

To create a public reports folder:

- Manage Public Reports


Primary Object	Description	Available Secondary Objects
		Product Items Product Requests (Source Location) Product Requests (Destination Location) Product Request Line Items (Source Location) Product Request Line Items (Destination Location) Product Transfers (Source Location) Product Transfers (Destination Location) Service Resources Service Territory Locations Shipments (Source Location) Shipments (Destination Location) Return Orders (Source Location) Return Orders (Destination Location) Work Orders Work Order Line Items
Maintenance Plans	View maintenance plans' work orders and assets.	Maintenance Assets Work Orders
Operating Hours	View the operating hours of service territories and their members.	Service Territories Time Slots
Orders	View an order's associated return orders.	<i>Field service objects:</i> Return Orders
Product Items	View the transfer, consumption, and replenishment of parts in your inventory.	Product Transfers Products Consumed Product Item Transactions
Product Request Line Items	View the transfers related to parts in your inventory.	Product Transfers
Product Requests	View the line items and return orders associated with product requests.	Product Request Line Items Return Orders
Products	View product requirements, transfers, requests, return order line items, and parts.	<i>Field service objects:</i> Assets Product Items

Primary Object	Description	Available Secondary Objects
		Products Required Product Request Line Items Product Transfers Return Order Line Items
Product Transfers	View product quantity, origin and destination locations, and owner of product transfers.	None
Return Orders	View return orders' line items.	Return Order Line Items
Service Appointments	Compare the differences between scheduled and actual appointment times, and analyze trends in resource assignment on appointments.	Assigned Resources
Service Contracts	View service contracts' maintenance plans and work orders.	<i>Field service objects:</i> Maintenance Plans Work Orders
Service Crews	View appointments that crews are assigned to and information about crew members.	Assigned Resources Service Crew Members
Service Resources	Compare service resources' capacities, absences, and skills, and view the territories they belong to and service appointments and crews they are assigned to. And, see which accounts or work orders list resources as preferred.	Assigned Resources Resource Absences Resource Capacities Resource Preferences Service Crew Members Service Resource Skills Service Territory Members Time Sheets
Service Territories	Compare the number and types of service appointments, work orders, and work order line items across service territories, and view the service resources that belong to each territory.	Service Appointments Service Territory Members Service Territory Locations Work Orders Work Order Line Items
Shipments	View shipment address and transfer information.	Product Transfers
Time Sheets	View time sheets' owners, entries, and duration.	Time Sheet Entries

Primary Object	Description	Available Secondary Objects
Users	View field service records created by, modified by, or associated with users.	<p><i>Field service objects:</i></p> <ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> Object Milestones Products Consumed Product Requests Products Required Product Request Line Items Resource Preferences Service Appointments


Primary Object	Description	Available Secondary Objects
		Skill Requirements Time Sheet Entries Work Order Line Items Work Order Line Items
Work Types	Compare information such as work type duration and skill requirements.	Maintenance Plans Products Required Skill Requirements

- 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.

- Click **Save**.
- 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.

SEE ALSO:

[Guidelines for Tracking Customer Returns](#)

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- Service territory members

Field Name	Description
Latitude	The latitude of the street address.
Longitude	The longitude of the street address.
GeocodeAccuracy	The accuracy of the latitude and longitude. This field contains one of the following values, listed in order from most to least accurate: <ul style="list-style-type: none"> • 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.

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

SEE ALSO:

[Track Service Resource Geolocation with the Field Service Mobile App](#)

[Track Service Resource Geolocation with the Field Service Mobile App](#)

Set Up Salesforce Labs Field Service Dashboards

Download a free package of Field Service dashboards and reports from Salesforce Labs AppExchange. Track metrics and performance for many key items of interest in a field service operation. Use these optional dashboards to create customized reports and dashboards for your operation's specific needs.

! **Important:** Salesforce Labs apps are free to use, but aren't official Salesforce products and are considered community projects. These apps aren't officially tested or documented. For help on any Salesforce Labs app, consult the [Salesforce Trailblazer Community](#). Salesforce Customer Support isn't available for these applications.

The package easily installs three standard dashboards that chart objects in your Field Service org. It's a good starting point for customizing performance and management dashboards that you can reconfigure and modify as needed.

Some of metrics tracked include:

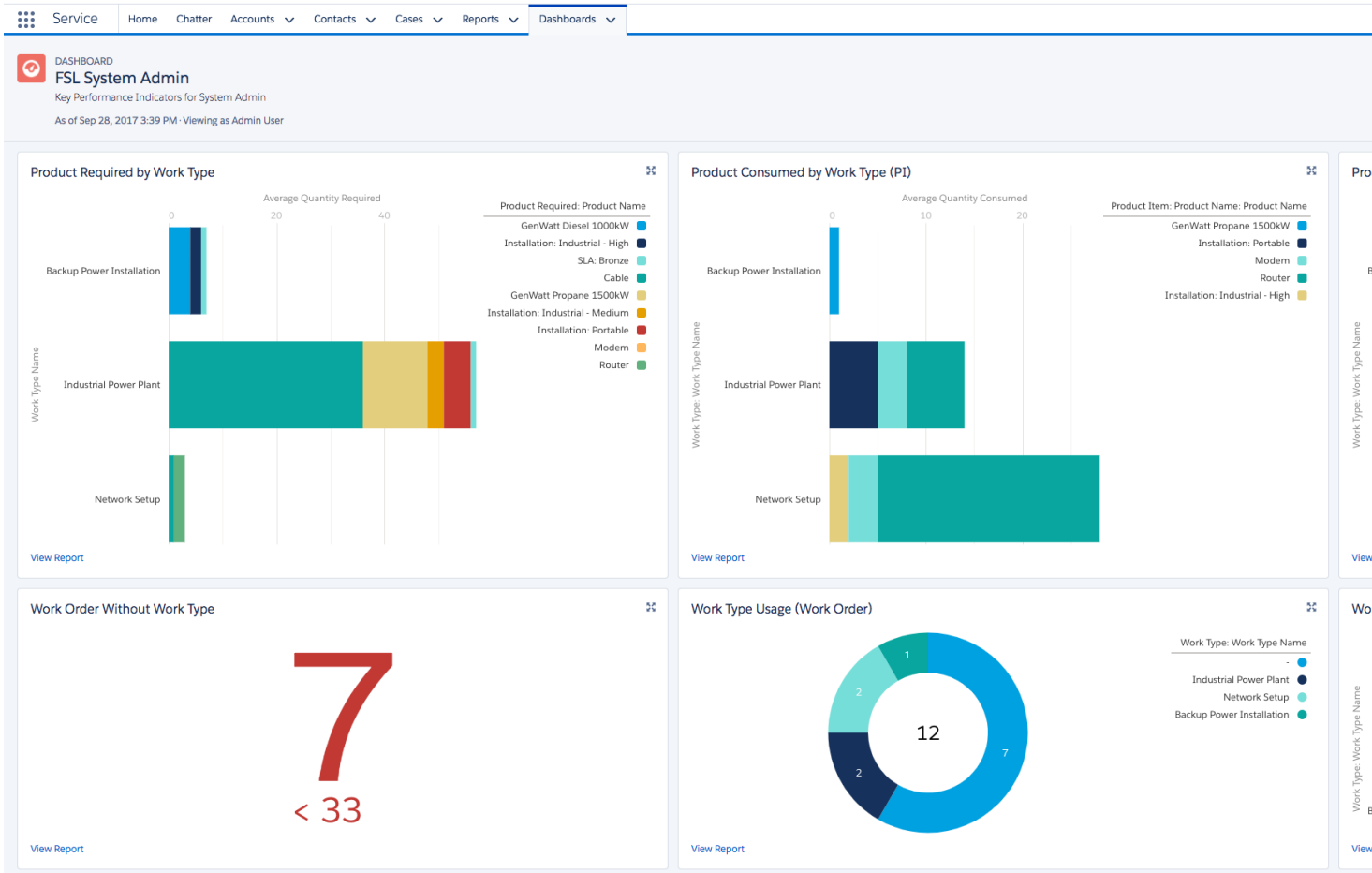
- Number of completed appointments by a resource
- Management by territory and utility
- Total hours worked by resource
- Number of maintenance plan checkins
- Resource capacity by territory
- Upcoming priority appointments
- Total number of completed appointments by week
- Products consumed by work orders
- Average appointment and travel times

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

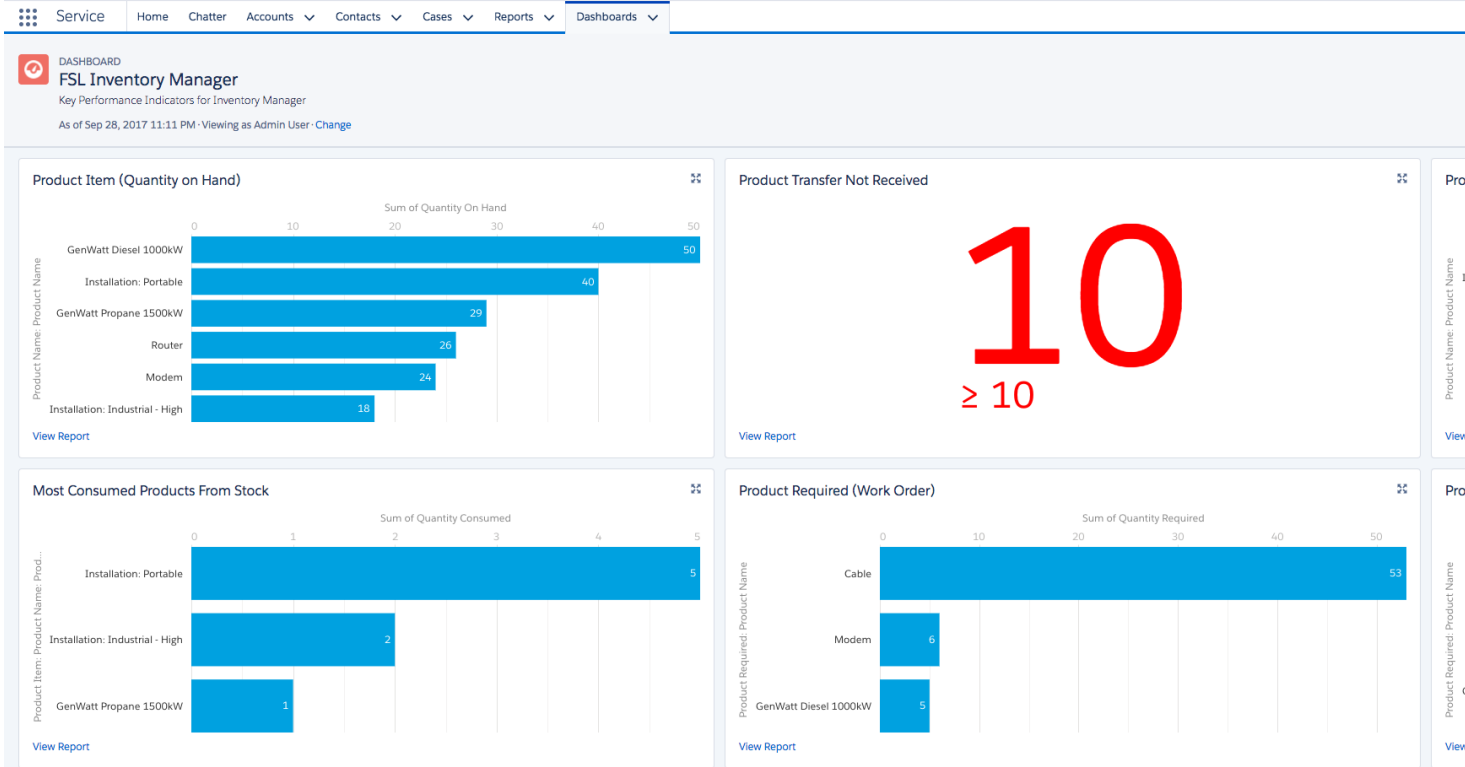
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

System Administrator Dashboard



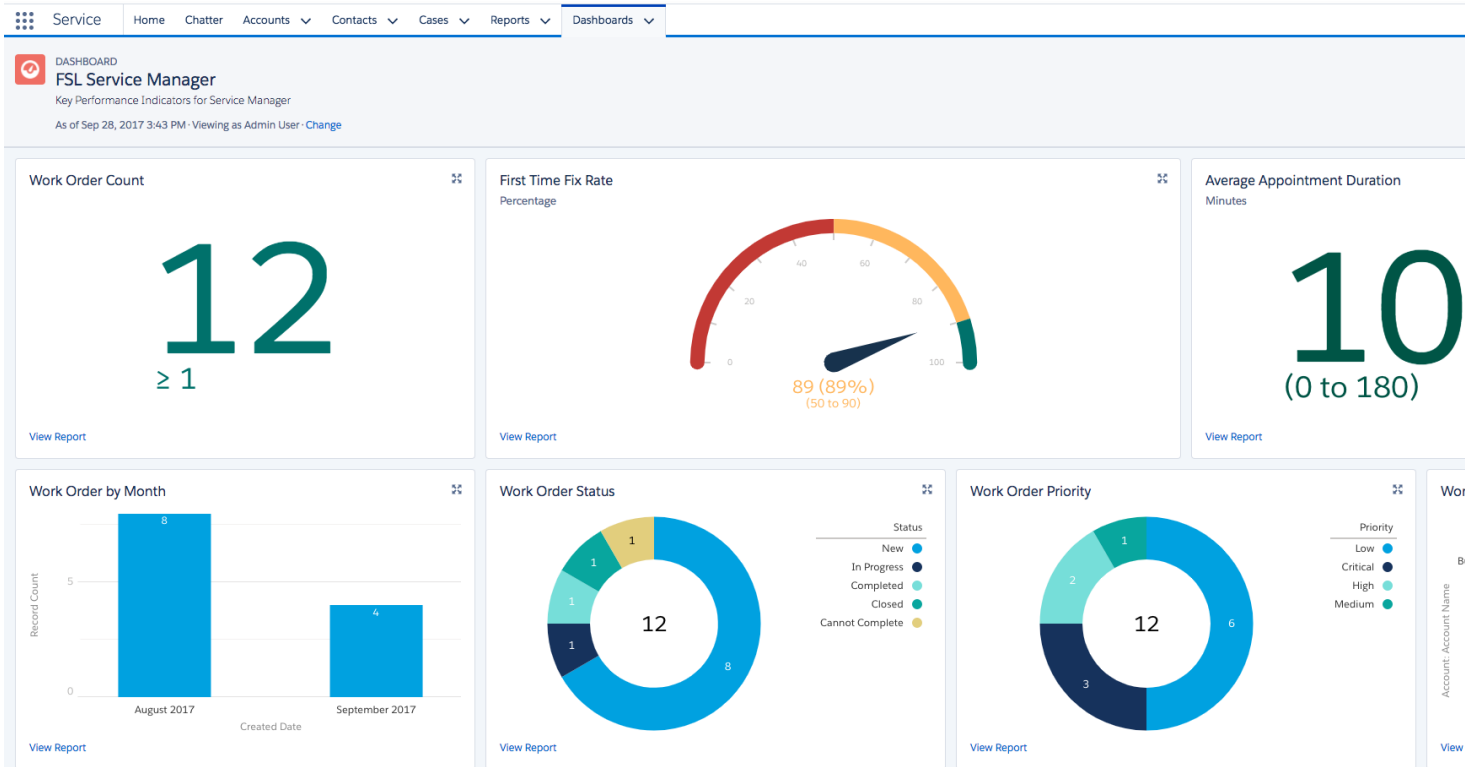
This dashboard displays metrics - such as products needed and consumed, and overall performance for each type of work.

Inventory Manager Dashboard



This dashboard displays information on how products are consumed and used, and by work order types.

Service Manager Dashboard



This dashboard focuses on the work performance of resources and additional work order metrics.

Download

To download the dashboards, click **Get It Now** on the the Field Service Dashboards page on [AppExchange](#).

SEE ALSO:

- [AppExchange: Installing Packages](#)
- [Reports and Dashboards](#)

Manage Field Service Work Orders

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.

[Create Field Service Work Orders](#)

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

[Create Field Service Work Plans](#)

Learn how to create and use Field Service work plans to deliver consistent service.

[Create Field Service Maintenance Plans](#)

Create Field Service 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.

[Troubleshooting Work Order Generations in Field Service](#)

If work orders aren't generating as expected these guidelines can help you resolve any issues.

SEE ALSO:

[Work Order Fields for Field Service](#)

[Work Order Line Item Fields for Field Service](#)

[Set Up Work Order Management for Field Service](#)

[Set Up Work Order Management for Field Service](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Create Field Service Work Orders

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, to 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 *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 require to complete the work order. For details, see Track Required Inventory in Field Service .
Skill Requirements	Skills required to complete the work order. For help, see Add Required Skills to Work Orders or Work Types for Field Service .

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 work orders:

- Create on work orders

To view work order line items:

- Read on work orders

To create, update, or delete work order line items:

- Edit on work orders

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.

[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](#)

Interact with knowledge articles on Field Service 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.

SEE ALSO:

[Work Order Fields for Field Service](#)

[Customize Work Order Settings for Field Service](#)

Trailhead: [Field Service Center Customization](#)

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.

SEE ALSO:

[Work Rule Type: Excluded Resources](#)

[Work Rule Type: Required Resources](#)

[Work Rule Type: Required Resources](#)

[Work Rule Type: Excluded Resources](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 resource preferences:

- Read on the parent object (work orders or accounts) AND Read on service resources

To create, edit or delete resource preferences on work orders:

- Edit on work orders AND Read on service resources

To create, edit or delete resource preferences on accounts:

- Edit on accounts AND Read on service resources

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 [Create 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.

SEE ALSO:

- [Create Skills for Field Service](#)
- [Create Work Types for Field Service](#)
- [Skill Fields for Field Service](#)
- [Create Skills for Field Service](#)
- [Track Required Inventory in Field Service](#)
- [Skill Fields for Field Service](#)
- [Guidelines for Creating Work Types for Field Service](#)
- [Work Type Fields for Field Service](#)
- [Work Rule Type: Match Skills](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 skill requirements:

- Read on the parent object (work orders or work types) AND Read on skills

To create, edit or delete skill requirements on work orders or work order line items:

- Edit on work orders AND Read on skills

To create, edit or delete skill requirements on work types:

- Edit on work types AND Read on skills

Attach Knowledge Articles to Work Orders or Work Types

Interact with knowledge articles on Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.](#)

SEE ALSO:

[Create Work Types for Field Service](#)

[Set Up Knowledge for Work Orders](#)

[Linked Article Fields](#)

[View Knowledge Articles in the Field Service Mobile App](#)

[Set Up Knowledge for Work Orders](#)

[View Knowledge Articles in the Field Service 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
- Service contracts
- Return orders
- Return order line items
- Service contracts



Tip: Add work orders to the console to manage work orders and their associated records in one place.

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

SEE ALSO:

[Work Order Fields for Field Service](#)

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.

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

Work order line items contain these price-related fields.

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

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Work Order Line Item Field	Description
	the line item, you can see the product's list price next to its name and ID in the lookup window. The list price field populates when you save the line item.
Product	<p>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:</p> <ul style="list-style-type: none"> • List Price • Unit Price • Subtotal • Total Price <p>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.</p>
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
- A price book entry is returned in search results only if its currency matches the work order's currency.

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.

SEE ALSO:

[Work Order Fields for Field Service](#)[Work Order Line Item Fields for Field Service](#)

Create Field Service Work Plans

Learn how to create and use Field Service work plans to deliver consistent service.

[Learn About Work Plans](#)

Keep Field Service workers on track with guided steps for completing their work.

[Set Up Work Plans](#)

Customize your work plans settings, assign users permissions to manage work plans, and map fields that display information for work plans and work steps.

[Build and Manage Work Plans](#)

Create and maintain work plans by defining templates for work steps and work plans, and create work plan selection rules.

[View and Complete Work Plans](#)

Back-office workers can view and complete work plans on their desktop.

SEE ALSO:

[View and Complete Work Plans on the Field Service Mobile App](#)

Learn About Work Plans

Keep Field Service workers on track with guided steps for completing their work.

Work plans are a set of prescribed steps that guide front-line and back-office workers on how to complete a work order. By following steps in work plans, field service teams can complete assignments quickly, consistently, and with less guesswork.

Work plans appear on a work order or work order line item. Each plan shows an ordered list of work steps. A work step can be a simple instruction such as "Put on your safety goggles." Or it can be a quick action or a field service mobile flow that guides workers through a procedure.

To make work steps and work plans easier to manage, they're created from templates. Templates help reuse plans and common steps across these plans. For example, service managers can reuse a work plan template for safety checks and add steps for work in an earthquake zone.

EDITIONS

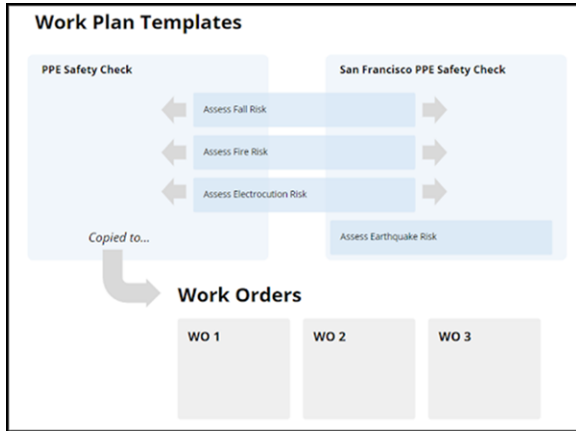
Available in: Lightning Experience

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

EDITIONS

Available in: Lightning Experience

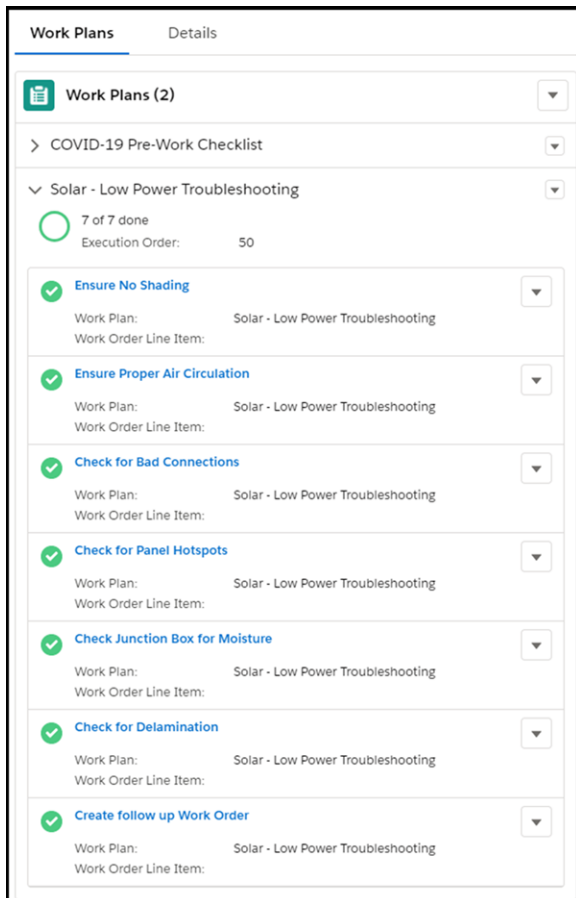
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.



Automate how work plans are assigned to work orders or work order line items using work plan selection rules. Service managers configure rules that add plans based on fields such as work type, asset, location, and service contract. A selection rule generates a point-in-time copy of a work plan and its steps from the templates, and it adds them to work orders or work order line items.

For example, for break-fix procedures, define work step templates and work plan templates for different assets. The selection rules map required work plans to asset types. When the service manager creates a work order or work order line item for an asset, the rules add instances of the right plans and steps.

Front-line and back-office workers view work plans on the work order or work order line item. As they complete steps, quick actions and flows guide them through the work.



Creating, maintaining, and using work plans is a team effort.

- Service managers, operations managers, or dispatchers typically build and maintain work plans. They define templates for work steps and work plans, and they create work plan selection rules.
- Salesforce Admins assign the right permissions for users to use and manage work plans. Also, if there's a work step that uses a field service mobile flow, the admin usually creates it.
- Front-line and back-office workers are the consumers of work plans. They're often a great resource to help admins build and refine work step and work plan templates.

Here's a summary of objects related to work plans.

- Work Step Template: A reusable pattern that describes a task. It can include a quick action or a field service mobile flow.
- Work Plan Template: A reusable pattern that describes an ordered list of steps.
- Work Plan Template Entry: A step, in the form of a work step template, that's added to a work plan template.
- Work Plan Selection Rule: The logic that selects which work plan templates and steps to associate with a work order or work order line item.
- Work Plan: A checklist that's displayed on a work order or work order line item.
- Work Step: A task on a checklist that the worker can complete.

Set Up Work Plans

Customize your work plans settings, assign users permissions to manage work plans, and map fields that display information for work plans and work steps.

[Enable Work Plans](#)

Before you customize its settings, enable your work plans.

[Customize Work Plans Settings](#)

Adjust work plans settings to accommodate your needs.

[Assign User Permissions for Work Plans](#)

Give users access to work plans.

[Map Fields for Work Plans](#)

Learn how standard fields for work plans are mapped from templates and how to map custom fields.

EDITIONS

Available in: Lightning Experience

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

Enable Work Plans

Before you customize its settings, enable your work plans.





1. From Setup, in the Quick Find box, enter **Work Plans**, and then select **Generate Work Plans and Work Steps from templates and selection rules**.
2. Optionally, to configure the flow logic that changes the work step status, select **Manually update a work step's status when flows are launched**. To automatically set a work step's status to Complete or Failed when flows are launched, deselect this option.
3. In Object Manager, edit page layouts for work order and work order line item objects. Add Work Steps and Work Plans to the layout in Related Lists. Under Mobile & Lightning Actions, add Generate Work Plans, Add Work Plans, and Delete Work Plans so that these actions appear in the action menu.

SEE ALSO:

[Flows](#)

Customize Work Plans Settings

Adjust work plans settings to accommodate your needs.

- Display the Work Plans Lightning web component on the work order or work order line item record page.
 - Add the related lists for your work steps and work plans to the page layout of the work order or work order line item.
 - Add the component to the layout of the work order or work order line item record page by using the Lightning App Builder.
 - Activate the record page to make it available to your Lightning Experience and mobile users by using the Activation function in the Lightning App Builder.
-  **Note:** If you haven't already customized the work order or work order line item record page, the Work Plans component is added to the record page layout by default.
-  **Note:** The Work Plans component is also available for Experience Builder sites. To learn how to add it to your site's page, see [Edit Pages and Components in Experience Builder](#).
- For the Work Plans Lightning web component and mobile app, create custom actions to display on the action menu of the work plan and work step records.
 - In Object Manager, go to Buttons, Links, and Actions and [create a new action](#) for the work plan or work step object.
 - Add the action to the page layout of the work plan or work step record. For the mobile app, add the action to Quick Actions in the Salesforce Classic Publisher.
-  **Note:** For an optimal experience with the Work Plans component, we recommend that you customize the action menu to display the Complete and Not Applicable actions first.
-  **Note:** The mobile app doesn't support custom actions that are associated with mobile flows and lightning actions.
- Customize the fields displayed on the work plan and work step records. In the page layout of the work plans and work steps' related lists, select the fields to display.

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 enable work plans:

- [Customize Application](#)

EDITIONS

Available in: Lightning Experience

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

 **Note:** For the information to display properly on the Work Plans Lightning Web Component, we recommend that you first include these fields in the layout:

- For work plans: Execution Order, Name, and Work Order Line Item
- For work steps: Execution Order, Name, and Status

- In Object Manager, edit page layouts for the work plan template object. To display the standard New Work Plan Selection Rule screen to users, select the **New** button to show in the layout of the work plan selection rule related list. To display the enhanced New Work Plan Selection Rule screen, select the **New Rule** button.
- Adjust service reports to include work plans and work steps information. To do that, adjust your [service report template](#) on page 421 to include work plans and work steps related lists information in reports. By default, work steps are grouped by work plan.

Considerations for Work Plans

- Only standard fields are supported for work plan selection rules.
- When the user clicks the **Complete** button for a work step and the step is completed successfully, we assign the first status value from the Completed status category. If the work step gets paused, we assign the first status value from the Paused status category.
- In Process Builder, if you want to use objects related to work plans, enter *w* in the picklist to show them. Otherwise, Process Builder doesn't list them.
- In work steps, we support predefined and custom global quick actions, custom object-specific actions defined on work order and work step objects, and field service mobile flows.
 - For the [mobile app](#) on page 736, we support Create, Update, and Flow quick actions.
 - If a quick action or mobile flow fails to load for a work step, an error icon appears next to the step's status icon. For actions showing errors, confirm that the action still exists and that it works on mobile. For flows showing errors, confirm that the user has Flow permissions.
- For the mobile app, we recommend that you create a page layout specific for mobile profiles when using work plans.
- Work plans can't be auto-generated if:
 - The work orders are created and updated to set the Owner to be a Queue during Create by a Flow/Workflow or a similar automation. **AND**
 - The work plan template has an associated work plan template and work step.

The work step entity has a child/detail relationship to work plans, and it doesn't have an Owner ID field and is only derived from the associated work plan. During the auto-generation process, it validates the work step owner, checks if it can be assigned to a queue (which it can't), and silently fails in the background. As a result, the work order is created without the work plan.

SEE ALSO:

[Introducing Lightning Web Components](#)

[Quick Actions](#)

[Flows](#)

[Activate Lightning Experience Record Pages](#)

[Create and Configure Lightning Experience Record Pages](#)

[Manage Service Reports](#)

[Customize Related Lists](#)

[Set Up and Manage Experience Cloud Sites](#)

Assign User Permissions for Work Plans

Give users access to work plans.

- For users who create or manage work plans, assign them Read, Create, Edit, Delete, and View All permissions on work plan templates, work step templates, and work plan selection rules.
- For users who work with work plans on desktop or mobile, assign them Read and Update permissions on work plans and work step records.
- To let users run quick actions and flows from work steps, assign them these permissions.
 - For global quick actions, give users the Create permission on related objects and the Update permission on records. For example, to run the action Create New Account, users need the Create permission on the Account object. To modify account records, users need the Update permission for those records.
 - To execute field service mobile flows, users need the Run Flows permission or the Flow User field enabled on the user detail page. To allow users with the standard user profile to create and run flows, give them the Manage Flows permission.
- To let users work with the Manage Work Plan Template Entries window, assign them Read and Edit permissions on the Execution Order field of the Work Plan Template Entry object.
- To view the Work Plans Lightning web component, assign users Read access on the Execution Order, Status, and Status Category fields.

SEE ALSO:

[Introducing Lightning Web Components](#)

[Quick Actions](#)

[Flows](#)

Map Fields for Work Plans

Learn how standard fields for work plans are mapped from templates and how to map custom fields.

Standard fields for work plan templates, work step templates, and work plan template entries are automatically mapped to work plans and work steps. The mapping of these fields can't be changed. The standard fields that are mapped from work plan templates to work plans are Name, Description, and Execution Order. The fields that are mapped from work step templates and work plan template entries to work steps are Action Definition, Action Type, Description, Execution Order, Name, and Work Plan Execution Order.

You can also add custom fields to work plan templates, work step templates, and work plan template entries so that your workers have all the information they need to efficiently and accurately complete their work. You can then map which fields to copy from the templates to a work plan or work step record.

1. [Add custom fields](#) to the work plan template / work step template / work plan template entry and to the work plan / work step.
2. From Setup, in the Quick Find box, enter *Work Plans*. On the Custom Field Mapping card in Work Plans Settings, select which custom field values to include from templates in work plans and work steps. You can:
 - a. Map custom fields from work plan templates to work plans.

EDITIONS

Available in: Lightning Experience

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

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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 customize work plans custom field mapping:

- [Customize Application](#)

b. Map custom fields from work step templates and work plan template entries to work steps.



Note: You can't delete a custom field mapped to a work plan or a work step.

3. Save your work. When work plans are generated, the custom fields are copied from the templates to the work plan and work steps of a work order or work order line item.

[Guidelines for Mapping Custom Fields for Work Plans](#)

Learn the best practices for mapping custom fields from templates to work plans and work steps. Mapping custom fields helps your front-line workers retain important information that they use to complete their work.

Guidelines for Mapping Custom Fields for Work Plans

Learn the best practices for mapping custom fields from templates to work plans and work steps. Mapping custom fields helps your front-line workers retain important information that they use to complete their work.

- Map any of these field types to custom fields of the same data type.
 - Formula
 - Auto Number
 - Checkbox
 - Currency
 - Date
 - Date / Time
 - Email
 - Geolocation
 - Number
 - Percent
 - Phone
 - Picklist
 - Multi-select Picklist
 - Text
 - Text Area
 - Text Area (Long)
 - Text Area (Rich)
 - Text (Encrypted)
 - Time
 - URL
- Each target field can have one source field mapped to it.
- You can map Auto Number fields to field types Text or Text Area.
- You can map Text and Text Area fields to custom field types of Text, Text Area, Text Area (Long), and Picklist. If you map to a Picklist field, the picklist must be unrestricted.
- You can map custom Picklist fields to custom field types of Text, Text Area, and Picklist (unrestricted), but not Text Area (Long).
- When mapping between Picklist and Text fields, if the source field value is longer than the target field allows, your data truncates.

- You can map custom lookup fields to custom lookup fields pointing to the same object.
- When mapping source entity custom fields (Work Plan Templates / Work Step Templates / Work Plan Template Entries), the selected target entity custom field (Work Plan / Work Step) must be of equal or greater length.
- You can't delete mapped custom fields from the source entity or the target entity. To delete a field, remove its mapping first.
- You can't change the field type of a mapped field. To change a field's type, remove its mapping first.
- You can't uninstall a package that references fields included in Work Plans Custom Field Mapping. Before uninstalling the package, remove any mappings of referenced fields.
- When mapping custom number, currency, or percent fields, the target field must have the same length and number of decimal places.
- Don't map custom formula fields to other formula fields or any other type of field.

Build and Manage Work Plans

Create and maintain work plans by defining templates for work steps and work plans, and create work plan selection rules.

[Before You Begin](#)

Create and design sample work plans.

[Get Started with Work Plans](#)

Here's a quick overview of how to get started with work plans.

[Create Work Step Templates](#)

Start by creating work step templates for the smallest individual units of work.

[Create Work Plan Templates](#)

Build work plan templates from your work step templates.

[Manage Work Step Templates](#)

Manage the work plan template entries that store the work step templates associated with your work plan template.

[Create Work Plan Selection Rules](#)

Add selection rules to automate how work plans are assigned to work orders.

[Generate Work Plans](#)

Generate work plans automatically on work orders and work order line items.

[Adjust Plans and Steps on Work](#)

Tweak work plans and work steps on a work order or work order line item.

[Delete Work Plans and Steps](#)

If you modify a work plan, you can delete the previous plan and its steps on an existing work order or work order line item.

EDITIONS

Available in: Lightning Experience

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

Before You Begin

Create and design sample work plans.

Collaborate with your team and outline sample work plans. For example, to design work plans for wind turbine maintenance, you capture typical maintenance steps at 6-month and annual intervals. A table or spreadsheet can help you identify how to reuse and revise work plans.

Work Plan	Work Steps	6-Month	Annual
Safety & PPE	1. Log arrival	✓	✓
	2. Put on safety gear	✓	✓
Generator maintenance	1. Lubricate generator bearings	✗	✓
	2. Change generator filter	✗	✓
	3. Replace gear oil	✗	✓
Hydraulic systems	1. Check fluid levels	✗	✓
	2. Refill reservoirs	✗	✓
	3. Drain and replace hydraulic fluid	✗	✓
Blade/bearing maintenance	1. Lubricate main bearings	✓	✓
	2. Lubricate pitch and yaw bearings	✓	✓
	3. Retorque bolts	✓	✓

For this planned maintenance example, work plan selection rules use the work type field to represent the type of visit. Because the same safety and blade/bearing maintenance procedures occur at both visits, the rules can replicate the work plans for both visit types.

Get Started with Work Plans

Here's a quick overview of how to get started with work plans.

Create a library of work step templates for individual tasks (1). Organize those step templates into work plan templates. You can create a library of work plan templates, such as a library of asset maintenance procedures (2), and then define rules that select the right plans for work assignments (3).

When you create a work order or work order line item, your rules add a point-in-time copy of plans and their steps based on your rules. Also, you can generate work plans on existing work orders or work order line items (4).

Your workers can then see what to do in the work plans that appear. Front-line workers can view the work plans on-site on their mobile app and back-office workers can view them on their desktops. As they perform steps, they can mark them as completed (5).

EDITIONS

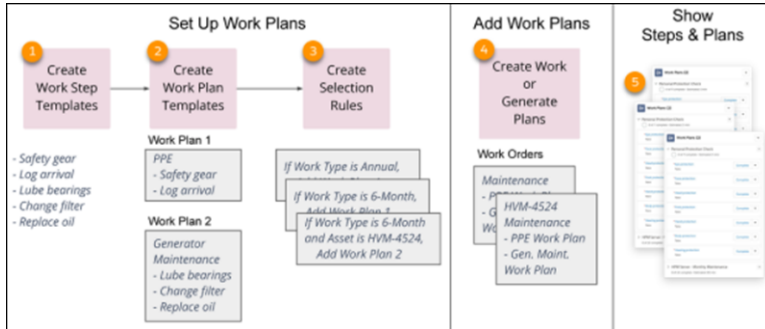
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EDITIONS

Available in: Lightning Experience

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Create Work Step Templates

Start by creating work step templates for the smallest individual units of work.

1. In the app launcher, click **Work Step Templates**.
2. Click **New**, and enter a name for the work step template.
3. Optionally, in Action Definition, select a quick action, a screen flow, or a field service mobile flow.

 **Note:** On mobile, we support flows of type Field Service Mobile.

Quick actions defined on work steps and work orders can be added to Action Definition.

4. Enter an optional description.
5. Click **Active**.
6. Save the work step template.

SEE ALSO:

[Quick Actions](#)
[Flows](#)

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 create work step templates:

- Create and Read on work step templates

To view work step templates:

- Read on work step templates

To update work step templates:

- Edit and Read on work step templates

To delete work step templates:

- Delete and Read on work step templates

Create Work Plan Templates

USER PERMISSIONS

To create work plan templates:	Create and Read on work plan templates
To view work plan templates:	Read on work plan templates
To update work plan templates:	Edit and Read on work plan templates
To delete work plan templates:	Delete and Read on work plan templates
To associate a work step template with a work plan template:	Create and Read on work plan template

EDITIONS

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Build work plan templates from your work step templates.

1. In the app launcher, click **Work Plan Templates**.
2. Click **New**, and enter a name for the work plan template.
3. Optionally, enter a positive value for relative execution order and a description.
4. Click **Active**.
5. Save the work plan template.

6. To associate a work step template with a work plan template, see [Manage Work Step Templates](#) on page 283.

Manage Work Step Templates

Manage the work plan template entries that store the work step templates associated with your work plan template.

1. On the work plan template, open the Related tab. On the Work Plan Template Entries related list, click **Manage**.

Name	Work Step Template	Execution Order
WPTE-0016	Ensure No Shading	1
WPTE-0017	Ensure Proper Air Circulation	2
WPTE-0018	Check for Bad Connections	3
WPTE-0019	Check for Panel Hotspots	4
WPTE-0020	Check Junction Box for Moisture	5
WPTE-0021	Check for Delamination	6
WPTE-0022	Create follow up Work Order	7

2. To add steps to the work plan template, click **Add**, and select work step templates from the list.

Name	Description
"Take Five" executed	ABB - General data & Safety
AC Panel - Inspect and clean casing	Solar - Half Yearly Maintenance
AC Panel - Measure o/p current	Solar - Half Yearly Maintenance
Adjust date and time, reset service scheduler	ABB - Controller inspection task
Air condition (option)	ABB - Paint controller
All fans removed and cleaned	ABB - Internal cleaning & check
Availability of system keys/IC/special add-in setup	ABB - Software & backup
Backup external for the customer and webconfig	ABB - Software & backup
Backup internal on robots harddrive	ABB - Software & backup

3. Save your work.
4. To remove steps from the work plan template, select the relevant work step templates, and click **Remove Selected**.
5. To confirm the action, click **Remove**.
6. To reorder the work step templates, click **Reorder**, and select the relevant work step templates.

Name	Work Step Template	Execution Order
WPTE-0016	Ensure No Shading	1
WPTE-0017	Ensure Proper Air Circulation	2
WPTE-0018	Check for Bad Connections	3
WPTE-0019	Check for Panel Hotspots	4
WPTE-0020	Check Junction Box for Moisture	5
WPTE-0021	Check for Delamination	6
WPTE-0022	Create follow up Work Order	7

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 manage work plan template entries:

- Create, Update, and Delete on work plan templates

To add work plan template entries:

- Create on work plan templates

To reorder work plan template entries:

- Update on work plan templates

To remove work plan template entries:

- Update and Delete on work plan templates


7. To reorder the steps, click **Move to Top** , **Move Up** , **Move Down** , or **Move to Bottom** , and then click **Save Reorder**.
8. If you're done, click **Done**.

Create Work Plan Selection Rules

Add selection rules to automate how work plans are assigned to work orders.


Work plan selection rules generate point-in-time copies of work plans from templates. For example, when you create a work order with a work type of monthly maintenance, your rule can copy the monthly maintenance work plan template and its steps to the work order.

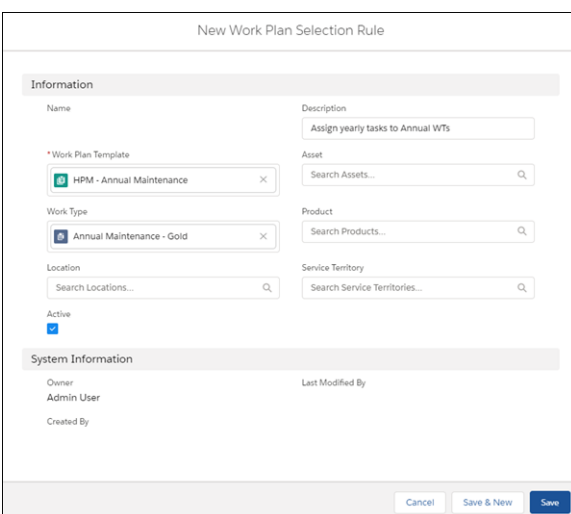
The criteria in a work plan selection rule is the trigger. It tells Salesforce which plan to copy to the work order or work order line item.

 **Tip:** If an annual maintenance visit includes the steps for monthly maintenance, define multiple rules, where one rule adds the annual work plan and another rule adds the monthly work plan. For example, you can use the work type field as a trigger in your rules.

If your Salesforce admin configured the standard New Work Plan Selection Rule screen for you, follow these instructions to create a work plan selection rule.

1. In the app launcher, click **Work Plan Templates**.
2. On the work plan template, open the Related tab. On the work plan selection rules related list, click **New**.
3. Select one or more fields as rule criteria. Values for work types, assets, locations, service contracts, products, or service territories can be specified in the work plan selection rule criteria. These fields are matched with the corresponding fields on the work order or work order line item to determine whether this selection rule is applicable to the work order or work order line item. If applicable, the corresponding work plan template is copied as a work plan for the work order or work order line item.

 **Note:** The rule generates a work plan when all fields in the rule match corresponding fields in the work order or work order line item. For example, if the rule specifies a work type and an asset as the selection criteria, it adds the work plan only when both fields match on the work order.



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 create work plan selection rules:

- Create and Read on work plan selection rules
- Read permissions on objects

To view work plan selection rules:

- Read on work plan selection rules

To update work plan selection rules:

- Edit and Read on work plan selection rules
- Read permissions on objects if changed

To delete work plan selection rules:


- Delete and Read on work plan selection rules

4. Enter an optional description for your rule.
5. Click **Active**.
6. To create more rules, click **Save & New**. If you're done, click **Save**.

 **Note:** You can also create work plan selection rules by clicking **New** in the Work Plan Selection Rules list view.

If your Salesforce admin configured the enhanced New Work Plan Selection Rule screen for you, follow these instructions to create a work plan selection rule.

1. In the app launcher, click **Work Plan Templates**.
2. On the work plan template, open the Related tab. On the work plan selection rules related list, click **New Rule**.
3. Enter an optional description for your rule.
4. Click **Active**.
5. Select one or more selection rule values as rule criteria. Values for work types, assets, locations, service contracts, products, or service territories can be specified in the work plan selection rule criteria. These field values are matched with the corresponding fields on the work order or work order line item to determine whether this selection rule is applicable to the work order or work order line item. If applicable, the corresponding work plan template is copied as a work plan for the work order or work order line item.

 **Note:** The rule generates a work plan when all fields in the rule match corresponding fields in the work order or work order line item. For example, if the rule specifies a work type and an asset as the selection criteria, it adds the work plan only when both fields match on the work order.

If a rule specifies a product as the selection criteria, the rule doesn't look for the corresponding field on the work order because no product field exists there. Instead, it looks at the Asset field and finds the matching product on the corresponding asset.

New Work Plan Selection Rule


Define when to apply a work plan's template to work orders. Add a work plan when the selection rule values match the work orders' corresponding fields.

* Work Plan Template
 X

Active

Description

* Owner

 If you don't select any values, and the work plan selection rule is active, the related work plan template is added to all new work orders.

Add this template to new work orders when:

Field	Operator	Value
Account	Equals	<input type="text" value="Search Accounts..."/>
AND		
Asset	Equals	<input type="text" value="Search Assets..."/>
AND		
Location	Equals	<input type="text" value="Search Locations..."/>
AND		
Product	Equals	<input type="text" value="Search Products..."/>
AND		
Service Contract	Equals	<input type="text" value="Search Service Contracts..."/>
AND		
Service Territory	Equals	<input type="text" value="Search Service Territories..."/>
AND		
Work Type	Equals	<input type="text" value="Search Work Types..."/>

 **Note:** If you don't select any values and the work plan selection rule is active, the related work plan template is added to all new work orders or work order line items.

6. Save your work.

Generate Work Plans

Generate work plans automatically on work orders and work order line items.

After you define templates and rules, you can generate work plans on new or existing work.

Here's how to generate work plans on a new work order or work order line item.

1. In the app launcher, click **Work Orders** or **Work Order Line Items**.
2. Click **New**.
3. To match the trigger in your selection rule, select one or more fields. For example, select work type.

4. Click **Save**.
5. To see the work steps and work plans that your rules generated, open the work order or work order line item, and view the Work Plans Lightning web component.

On an existing work order or work order line item, you can select **Generate Work Plans** from the action menu. When columns in a rule match a field in the work order or work order line item, the rule generates a work plan on that record. This action doesn't change existing work plans, but it's a handy way to add a new plan.

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 generate work plans on a work order or work order line item:

- Edit and Read on work order or work order line item

Read and View All on work plan templates and work step templates to use the Add Work Plan and Generate Work Plans actions

Read on work plan selection rules

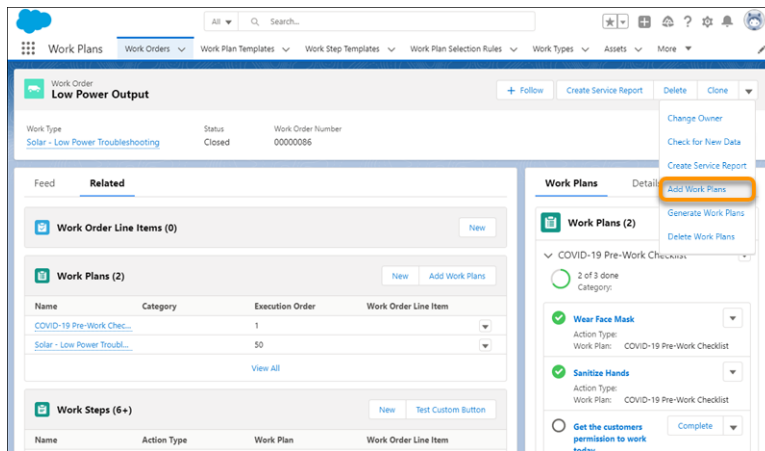
Adjust Plans and Steps on Work

Tweak work plans and work steps on a work order or work order line item.

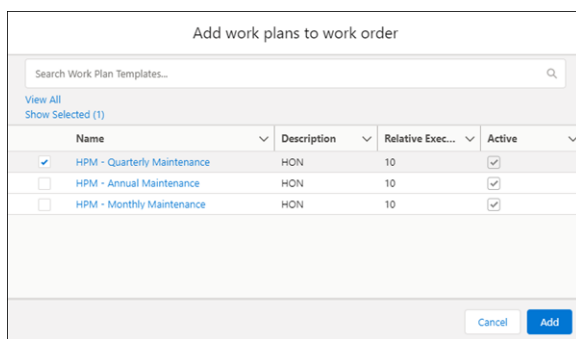
Sometimes it's necessary to adjust plans and steps on a work order or work order line item. For example, suppose your company requires a new safety procedure on every job. Create a work plan template with the procedure, and use that template to add the plan to outstanding work orders. If you don't have an existing template, you can use the **New** button.

To add a work plan from a work plan template, follow these steps.

1. On the work order or work order line item, select **Add Work Plans** from the action menu.



2. Select one or more work plans to add from the list of work plan templates. You can search and select plans from your search results. The Show Selected link lets you see what's selected.



3. Click **Add**. Added work plans and work step instances appear in the related lists.

 **Note:** You can add work plans more than one time. We don't prevent duplicates.

To add another work step from a work step template.

1. On the work order or work order line item, go to the Work Plans related list.
2. Select a work plan, or create a new one.
3. On the work plan record, select **Add Work Steps** from the action menu.

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 add work plans on a work order or work order line item:

- Edit and Read on work order or work order line item

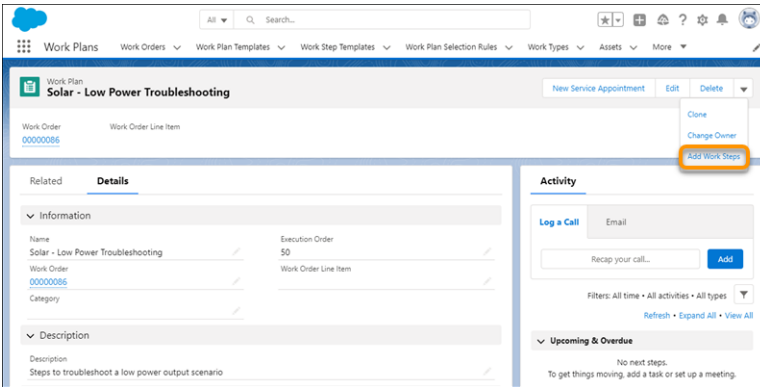
Create, Edit, and View All on work plan templates, work step templates, and work plan selection rules

To add work steps to a work plan:

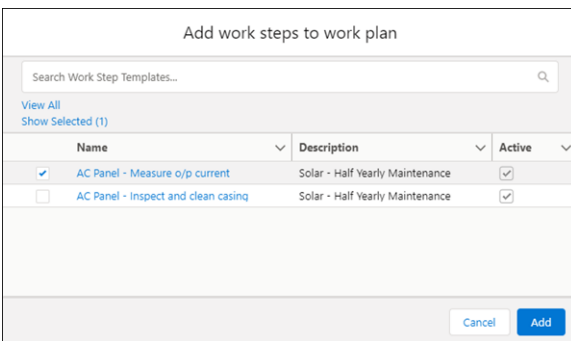
- Edit and Read on work order or work order line item

Edit and Read on work plans

Read on work step templates



4. Select work step templates and click **Add**.




Delete Work Plans and Steps

If you modify a work plan, you can delete the previous plan and its steps on an existing work order or work order line item.

 **Note:** This action deletes all work plans on the work order or work order line item.

1. On the work order or work order line item, select **Delete Work Plans** from the action menu.

 **Note:** If the work order includes a work order line item that has its own plans, we don't delete the plans from the child work order line item.

EDITIONS

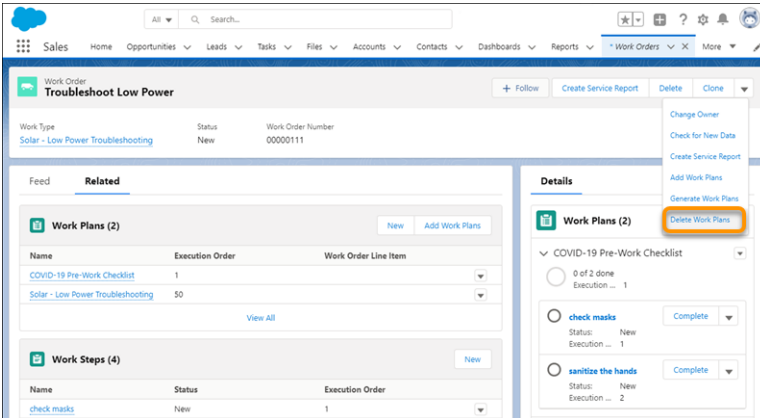
Available in: Lightning Experience

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

USER PERMISSIONS

To delete work plans:

- Delete and Read on work plans



- To add the latest versions of your plans and steps, select **Generate Work Plans** from the action menu.

View and Complete Work Plans

Back-office workers can view and complete work plans on their desktop.

As a back-office worker, you want to complete assignments quickly and accurately. To help you reach this goal:

- Use the Work Plans Lightning web component on the work order or work order line item.
- Use the related list of work steps on the work order or work order line item.

To view and complete work plans on the Field Service mobile application, see [View and Complete Work Plans on the Mobile App](#) on page 774.

[Complete Work with Work Plans Lightning Web Component](#)

The Work Plans component displays the work plans and work steps associated with the work order or work order line item. You can use it to view and complete assignments quickly and accurately.

[Complete Work with the Work Steps Related List](#)

Use the work steps related list associated with a work order or work order line item to view and complete your work.

SEE ALSO:

[Introducing Lightning Web Components](#)

[View and Complete Work Plans on the Field Service Mobile App](#)

EDITIONS

Available in: Lightning Experience

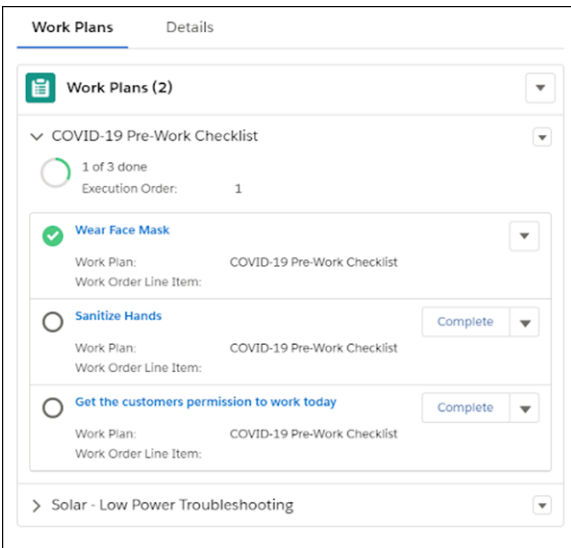
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

Complete Work with Work Plans Lightning Web Component

The Work Plans component displays the work plans and work steps associated with the work order or work order line item. You can use it to view and complete assignments quickly and accurately.

1. On the Work Plans component, expand the relevant work plan record to view its details and its associated work steps.

 **Note:** You can load only the first two fields from the Work Steps related list on the Work Plan.



2. On the work plan record, view the progress of the work plan on the progress ring. The progress ring is updated based on the real-time progress of the work plan.
3. On the work step record, view the status of the step on the step's status icon.
4. To mark a step's status completed, click **Complete** on the work step record, or select **Complete** on the action menu of the step.

 **Note:** You can also mark a step Not Applicable on the work step's action menu.

If the step is a simple instruction, such as "Put on your safety gear", we mark the step's status as completed. If the step includes a quick action or a field service mobile flow, selecting **Complete** starts it. When a quick action starts, we change the work step's status to Complete when the action is completed. When a flow starts, the status changes according to the way the flow is configured. Completed work steps remain on the work plan record.

SEE ALSO:

[Introducing Lightning Web Components](#)

[Quick Actions](#)

[Flows](#)

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 the work plan record:

- Read on Execution Order, Name, and Work Order Line Item fields

To view the work step record:

- Read on Execution Order, Action Definition, and Action Type fields

To update the work step record:

- Update on Status and Status Category fields

Complete Work with the Work Steps Related List

Use the work steps related list associated with a work order or work order line item to view and complete your work.

1. On the work order or work order line item, open the work steps related list.
The list shows steps from the plans and the recommended execution order.
2. On the action menu of a step, select **Complete**.

Name	Action Type	Work Plan	Work Order	Execution Order	Status
Get the customers permission to work today		COVID-19 Pre-Work Checklist		3	New
Ensure Proper Air Circulation		Solar - Low Power Troubleshooting		2	Complete
Check for Bad Connections		Solar - Low Power Troubleshooting		3	Complete
Check for Panel Hotspots		Solar - Low Power Troubleshooting		4	Complete
Create follow up Work Order	Quick Action	Solar - Low Power Troubleshooting		7	Complete
Check Junction Box for Moisture	Quick Action	Solar - Low Power Troubleshooting		5	Complete
Check for Delamination		Solar - Low Power Troubleshooting		6	Completed
Ensure No Shading	Flow	Solar - Low Power Troubleshooting		1	Completed
Wear Face Mask		COVID-19 Pre-Work Checklist		1	Completed
Sanitize Hands		COVID-19 Pre-Work Checklist		2	Completed

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 work steps:

- Read on work plans

To update work steps:

- Edit on work plans

 **Note:** You can also mark a step Not Applicable on the work step's action menu.

If the step is a simple instruction, such as “Put on your safety gear”, we mark the step’s status as completed. If the step includes a quick action or a field service mobile flow, selecting **Complete** starts it. For example, this step starts the Log a Call quick action.

When a quick action starts, we change the work step’s status to Complete when the action is completed. When a flow starts, the status changes according to the way the flow is configured. Completed work steps remain on the work step related list.

SEE ALSO:

[Quick Actions](#)

[Flows](#)

Create Field Service Maintenance Plans

USER PERMISSIONS

To create maintenance plans:	Create on maintenance plans
To view maintenance assets:	Read on maintenance plans and assets
To create, update, or delete maintenance assets:	Edit on maintenance plans
To generate work orders for a maintenance plan:	Read on assets and work types AND Create on work orders and service appointments
To edit page layouts:	Customize Application

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Create Field Service 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. 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.
8. 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.
9. 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.

10. To create work orders automatically, 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. 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.
 - b. 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.

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.

11. 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.
12. 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?](#).
13. Enter a title and description for the maintenance plan.
14. Save your changes.
15. 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.

16. 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 rules. 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.
17. 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](#)

Field Service 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.

[Guidelines for Working with Maintenance Work Rules](#)

With maintenance work rules you set up multiple recurring maintenance schedules for maintenance assets. Learn how maintenance work rule settings affect work order generation.

[Guidelines for Preventive Maintenance](#)

To optimize technician productivity and increase uptime and mean time to failure of equipment, create preventive maintenance plans for your assets.

SEE ALSO:

[Maintenance Plan Fields](#)[Trailhead: Field Service Preventive Maintenance](#)[Maintenance Plan Fields](#)[Guidelines for Generating Work Orders from a Maintenance Plan](#)

Guidelines for Generating Work Orders from a Maintenance Plan

Field Service 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.

 **Note:** Refer to [Guidelines for Working with Maintenance Work Rules](#) on page 298 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.

Both methods allow you to customize batch generation timing using Generation Horizon (Days) or select **Generate new batch upon completion**. For details, see [Maintenance Plan Fields](#).

 **Note:** If **Generate new batch upon completion** is selected, a new batch of work orders isn't generated 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.

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.
- If the maintenance work rules date of first work order in the next batch is earlier than the current date minus the generation time frame, update the **Next Suggested Maintenance Date** to fall into the eligible date range.
- If the **Next Suggested Maintenance Date** is outside the eligible generation window, adjust that date to align with the date of generation to yield expected results. For example, if you expect work orders to be created on a specific date of the month, ensure that the **Next Suggested Maintenance Date** is within the eligible generation window.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 work orders from maintenance plans

- Create, view, and edit on Service Appointments, Work Orders, and Work Order Line Items

View and edit on Maintenance Plan, Maintenance Work Rules, and Maintenance Assets

AND

View on Assets

To view, create, and update recordset filter criteria

- View, create, and edit on Service Appointments, Shifts, Recordset Filter Criteria, and Recordset Filter Criteria Rules

AND

Delete on Recordset Filter Criteria and Recordset Filter Criteria Rules

View access on the Source Object, Filtered Object, and Filtered Object fields

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

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

When 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.

When you're using maintenance plans with maintenance work rules, the maintenance plan gets picked up regardless of the next suggested maintenance date on the maintenance plan or the maintenance asset.

To further customize batch generation timing, specify a Generation Horizon (Days) or select Generate new batch upon completion. For details, see [Maintenance Plan Fields](#).

Can I Get a Report of the Work Orders Generated?

To receive a Chatter post detailing the work orders, work order items, and service appointments generated for each maintenance plan, see the following topics:

- [Customize chatter feed tracking](#)
- [Turn on field history tracking on work order generation status](#)
- [Create a report type on the feed to see all the feeds in one report](#)

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 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.

Work Order Generation Method		Service Appointment Generation Method		Result
One work order per asset	One work order line item per asset	One service appointment per work order	One service appointment per work order line item	
				<p>If Work Order Generation Method is set to One work order per asset, you can't set a Service Appointment Generation Method.</p> <p>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.</p> <p>Example: A maintenance plan with four assets, a generation time frame of 6 months, and a frequency of 1 month produces:</p> <ul style="list-style-type: none"> • Four work orders a month, 24 work orders for 6 months. • A service appointment for each work order, if the auto-create service appointment is enabled on an associated work type.
				<p>Invalid: If Work Order Generation Method is set to One work order line item per asset, you must select a Service Appointment Generation Method.</p>
				<p>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.</p> <p>Example: A maintenance plan with four assets, a generation time frame of 6 months, and a frequency of 1 month produces:</p> <ul style="list-style-type: none"> • 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.
				<p>One parent work order is created, a work order line item is created for each asset and relevant maintenance work rule, and if the associated work type has auto-create service appointment enabled for work order line items, one service appointment is created for each work order line item.</p> <p>Example: A maintenance plan with four assets, a generation time frame of 6 months, and a frequency of 1 month produces:</p> <ul style="list-style-type: none"> • One work order each month, six work orders for 6 months. • Four work order line items on each work order. • If auto-create service appointment for work order line item is enabled on the work type, a service appointment for each work order line item, four service appointments per month, 24 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 Are Addresses Added to Work Orders?

You can automatically add an address to the work orders in an org. The address on the work order is then automatically added to any resulting service appointments. To determine the address, the work order or work order line item looks for an address to add in this order: the asset address, the visitor address on the asset's location, and then the shipping address on the maintenance plan account.

The address field on the work order or work order line item is populated only if:

- The **Populate Address for Work Orders or Work Order Line Items** permission is selected in Field Service Settings.
- The maintenance plan uses maintenance work rules.
- The generation method isn't one work order line item per asset, and the service appointment isn't one service appointment per work order.

Before you select this option, review the addresses for your assets, locations, and accounts. Clean up the addresses so that they're consistent with your maintenance plan conventions. For example, if all assets have an address or location address and use 1asset1WOLI and 1SA1WOLI, make sure all assets under the same maintenance plan have the same address or location address.

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.

SEE ALSO:

[Maintenance Plan Fields](#)

[Create Field Service Maintenance Plans](#)

[Maintenance Plan Fields](#)

[Trailhead: Field Service Preventive Maintenance](#)

Guidelines for Working with Maintenance Work Rules


With maintenance work rules you set up multiple recurring maintenance schedules for maintenance assets. Learn how maintenance work rule settings affect work order generation.

Number of Maintenance Work Rules Per Maintenance Plan

We recommend that there are no more than the equivalent of 2,000 maintenance work rules per maintenance plan. The number of maintenance work rules on a maintenance plan is the sum of:

- the number of maintenance work rules on maintenance assets.

- the equivalent number of maintenance work rules on maintenance assets derived from the maintenance plan for maintenance assets without maintenance work rules.

 **Example: Number of Maintenance Work Rules Per Maintenance Plan** A maintenance plan has ten maintenance assets. The maintenance plan has three maintenance work rules. Two of the maintenance assets have maintenance work rules, one has one rule and the other two. The number of equivalent maintenance work rules is as follows:

- Maintenance work rules on maintenance assets: $1 + 2 = 3$
- Maintenance work rules derived from the maintenance plan: $8 \text{ (maintenance assets without maintenance work rules)} * 3 = 24$

This configuration gives an equivalent work rule count of 27.

We recommend no more than 5 maintenance work rules per maintenance plan and no more than 5 maintenance work rules per maintenance asset.

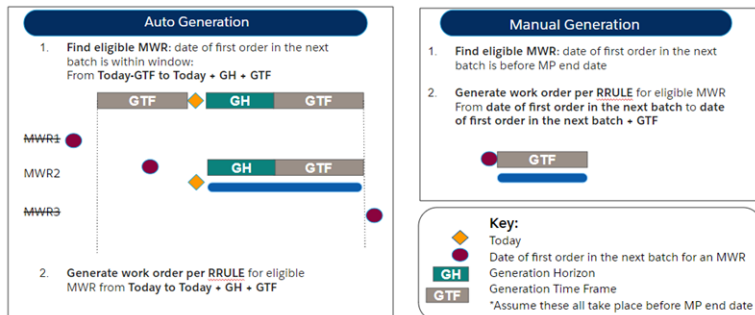
Understanding Work Order Generation

You can generate work orders from information on the maintenance plan alone. Or you can generate work orders from information on the maintenance plan and the maintenance work rules associated with the maintenance plan or its assets. The following table illustrates the differences in how these two approaches generate work orders automatically and manually.

Recurrence scenario	Maintenance plan without maintenance work rules	Maintenance plan without maintenance work rules	Maintenance plan with maintenance work rules	Maintenance plan with maintenance work rules
Generation mode	Rolling	Batch	Rolling	Batch
Date range that determines eligible for work order generation	Date of first work order in the next batch in the range of today minus Generation Time Frame to the first of today plus Generation Horizon or maintenance plan End Date .	Date of first work order in the next batch is before maintenance plan End Date .	Date of first work order in the next batch in the range of today minus Generation Time Frame to today plus Generation Horizon plus Generation Time Frame , as long as this range is before the maintenance plan End Date	Date of first work order in the next batch is before maintenance plan End Date .
Last possible suggested maintenance date that work orders are generated for	The earliest of Date of first work order in the next batch plus Generation Time Frame or maintenance plan End Date .	The earliest of Date of first work order in the next batch plus Generation Time Frame or maintenance plan End Date .	Today plus Generation Horizon plus Generation Time Frame .	The earliest of Date of first work order in the next batch plus Generation Time Frame or maintenance plan End Date .
Last day in the generation window	Work orders generated can include the last day.	Work orders generated can include the last day.	Work orders generated exclude the last day.	Work orders generated exclude the last day.
Generation approach, see Batch Versus Rolling Generation on page 301	Batch window	Batch window	Rolling window	Batch window

Recurrence scenario	Maintenance plan without maintenance work rules	Maintenance plan without maintenance work rules	Maintenance plan with maintenance work rules	Maintenance plan with maintenance work rules
Automatic generation upon work order completion	Yes	N/A	Yes	N/A
Respects sort order	N/A	N/A	If Generate new batch upon completion isn't selected, then Sort Order is respected. If Generate new batch upon completion is selected, then maintenance work rules associated with the last incomplete work orders or work order line items aren't considered when evaluating sort order. See also, Automatic generation example on page 300 in Sort Order and the Generate New Batch Upon Completion Setting.	Yes, except when the Date of first work order in the next batch values are offset. See also, Manual generation example on page 301 in Sort Order and the Generate New Batch Upon Completion Setting.
Work Order Generation Limit Enforcement	Generates up to 2,600 work orders and advises of limit enforcement in a Chatter message.	Show an online error message and doesn't generate any work orders.	Sends a Chatter notification and doesn't generate any work orders.	Sends a Chatter notification and doesn't generate any work orders.

The following diagram shows when work orders are created in automatic generation.

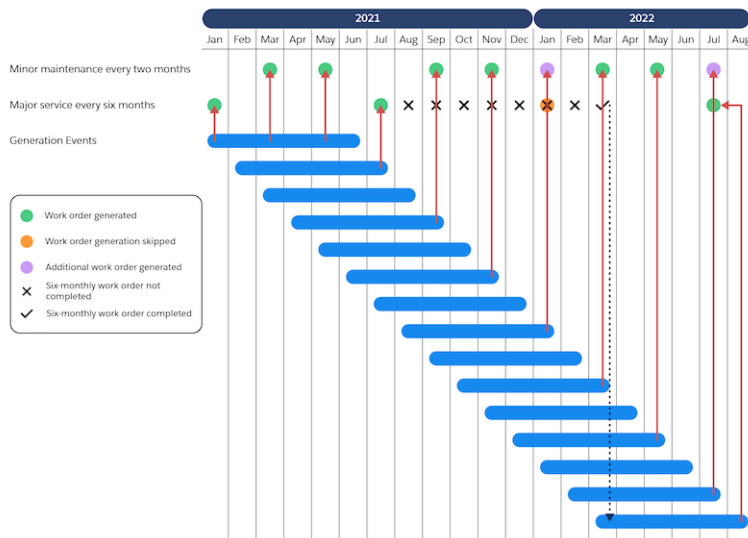


Example: Rolling Generation

The following diagram shows the generation of work orders for an asset that has **Generate new batch upon completion** set, **Generation Timeframe** set to 6 months and maintenance work rules for:

- Major maintenance to be performed every six months
- Minor maintenance to be performed every two months, but skipped when major maintenance is performed

When the major maintenance for July 2021 is then delayed by 7 months, the work order for the major maintenance in January 2022 isn't generated. Instead the work order for the minor maintenance is created. Before the major maintenance for July 2021 is completed, the generation window opens for July 2022 and generates work orders for the minor maintenance. When the major maintenance is completed, its maintenance work rule becomes eligible in the next generation window and the work order for the major maintenance in July 2022 is generated. After this, assuming work orders are completed on time, the schedule generates as expected.



Example: Batch Generation

Take a maintenance work rule recurring monthly for 12 months. The first maintenance work rule starts on 7/1 and has a sort order of 1 and the second maintenance work rule starts on 8/1 with a sort order of 2. From 7/1/2020 to 6/1/2021 only the first maintenance work rule, because of its lower sort order number, generates work orders. But on 7/1/2021, the second maintenance work rule generates work orders when the first maintenance work rule is no longer attempting to generate work orders.

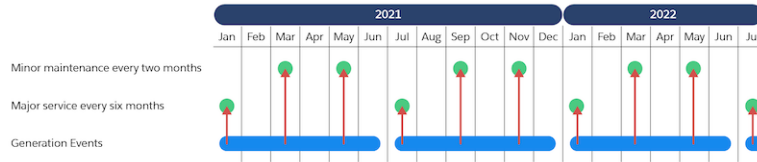
Batch Versus Rolling Generation

In batch generation, work orders are generated for the asset's generation timeframe and then not considered for generation again until the generation timeframe has passed. The **Generation Horizon** and **Generation Upon Completion** features aren't available for batch generation.

In rolling window generation, when work order generation runs it creates work orders according to the recurrence pattern for eligible maintenance work rules from the current date to the current date plus the generation horizon plus the generation timeframe.

By default, manual and automatic work order generation use a rolling window for calendar-based preventive maintenance. You can still opt to use a batch window to create work orders manually for calendar-based maintenance plans. However, that option doesn't support advanced features such as **Generation Horizon** and **Generation Upon Completion**. To generate work orders using a batch window, go to Field Service Settings and select **Use batch generation to create work orders manually**.

In the following diagram, the generation timeframe is 6 months and the generation horizon is 0 days. The blue bar represents the batch generation window. The start of the blue bar is when auto generation runs. Not all generation events are shown, automatic generation runs 3 times daily.



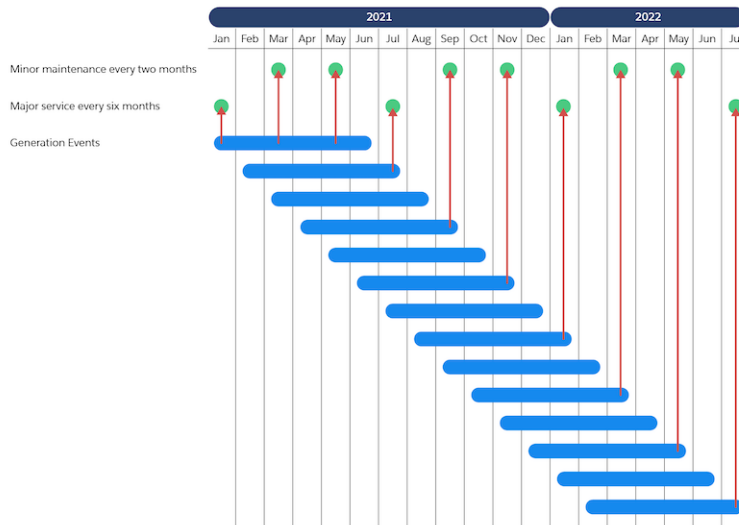
Eligible Maintenance Work Rules

Eligible maintenance work rules are rules whose date of first work order in the next batch is between:

- the current date minus the generation time frame and
- the current date plus the generation time frame plus the generation horizon.

If an eligible maintenance work rule's date of first work order in the next batch is earlier than the current date, generation doesn't create work orders for the period between the date of the first work order in the next batch and the current date.

Maintenance work rules whose date of first work order in the next batch is earlier than the current date minus the generation time frame will start generating work orders when the date of first work order in the next batch is updated to fall into the eligible date range.




For example, take the case where today is 1/8 and a maintenance work rule has a generation time frame of 10 days and generation horizon of 8 days:

- If the date of first work order in the next batch is 1/11, the maintenance work rule is eligible for generation and work orders following the recurrence pattern are generated from 1/11 to 1/26.
- If the date of first work order in the next batch is 1/1, the maintenance work rule is eligible for generation and work orders following the recurrence pattern are generated from 1/8 to 1/26.
- If the date of first work order in the next batch is 12/15, then no work orders are generated because 12/15 is before today's date minus the generation timeframe that is 1/8 minus 10 days giving 12/29.

Understanding Work Order Recurrence

A recurrence pattern determines how often maintenance visits are scheduled based on the maintenance plan. To create a maintenance schedule, you can use a maintenance work rule on the maintenance asset or maintenance plan, or you can use the frequency fields on the maintenance plan. Additionally, if you need more flexibility to meet your work order generation needs, define RRULE in the API to create a highly customized schedule.

 **Note:** We've started the process for retiring the maintenance plan frequency fields. The fields are retired in Jan '24. Update your maintenance plans to take advantage of maintenance work rules instead.

When a work order is scheduled, the recurrence frequency is determined in this order:

Maintenance asset maintenance work rules > Maintenance plan maintenance work rules > Maintenance plan frequency fields

Maintenance work rules on the maintenance asset override any recurrence defined on the maintenance plan. If there are no maintenance work rules defined for the maintenance asset, the maintenance work rules on the maintenance plan are used to set the recurrence. If there are no maintenance work rules defined on the maintenance asset or maintenance plan, then the frequency fields on the maintenance plans are used to define the recurrence pattern.

 **Example: Recurrence Hierarchy** There's a maintenance plan with 2 maintenance assets (MA). The maintenance work rules (MWR) are defined as:

- The maintenance plan has MWR1
- MA1 has no MWR
- MA2 has MWR2

MA1 uses MWR1 (inherits from the maintenance plan). MA2 uses MWR2 (overrides what's on maintenance plan).

Using MONTHDAY

The RRULE property MONTHDAY allows you to schedule an event that occurs monthly on a specific date. For example, you can use the MONTHDAY property to generate work orders on the first of every month:

```
"FREQ=MONTHLY; INTERVAL=1; BYMONTHDAY=1;"
```

While generating work orders on the first of every month is straightforward, generating work orders on the 31st of every month requires you to specify additional RRULE properties. To generate work orders on the 31st of every month, you could use this RRULE:

```
"FREQ=MONTHLY; INTERVAL=1; BYMONTHDAY=31;"
```

However in Salesforce, that RRULE generates work orders on the last day of every month: Jan 31, Feb 28, Mar 31, April 30, May 31, June 30, July 31, Aug 31, Sep 30, Oct 31, Nov 30, Dec 31. In the API, you can specify additional properties in your RRULE to produce work orders only for months with 31 days:

```
FREQ=MONTHLY; COUNT=30; INTERVAL=1; WKST=MO; BYMONTH=1, 3, 5, 7, 8, 10, 12; BYMONTHDAY=31
```

This RRULE ensures that work orders are only generated on Jan 31, Mar 31, May 31, Jul 31, Aug 31, Oct 31, Dec 31.

Date of the First Work Order in the Next Batch and Maintenance Work Rule Alignment

If the entered Date of first work order in the next batch doesn't match the RRULE pattern, the system uses the earliest date in the current month or later that matches the RRULE and is within the generation time frame. It's possible that a date matching the RRULE in the current month isn't within the generation time frame, as shown in most of the following examples.

For example, if the RRULE is set to generate work orders on the first day of every other month, with a generation time frame of 2 months, and today is 8/19/2020 the following occurs:

Entered Date of first work order in the next batch	Earliest date in the current month according to the RRULE	Suggested maintenance date of work orders or work order line items generated
8/19, meaning today	8/1, but it's in the past	10/1

Entered Date of first work order in the next batch	Earliest date in the current month according to the RRULE	Suggested maintenance date of work orders or work order line items generated
8/4, or any date in the past in the current month	8/1, but it's in the past	10/1
8/29, a date in the future in the current month	8/1, but it's in the past	10/1
7/30, a date in the past in a past month	7/1, but it's in the past	9/1
9/20, a date in the future in a future month	9/1, it's in the future, but the generation time frame is 9/20 to 11/20	11/1
9/1, the earliest date matching the RRULE after the current date	9/1	9/1

Using Sort Order

Sort order determines how work orders are generated for a maintenance asset when that maintenance asset has two or more maintenance work rules attempting to generate a work order for the same date. Sort order works as follows:

- When maintenance work rules for generation have different sort orders, only work orders for the rules with the lowest sort order value are generated.
- When maintenance work rules for generation have the same sort order, all the work orders are generated.

After consideration for generation, maintenance work rules have their Date of first work order in the next batch advanced as though all their work orders were generated, as shown in the Multiple Rules with Multiple Sort Orders example.

Example: Multiple Rules with Multiple Sort Orders

Albert, the service manager at Red Brick Building Services, receives details of a new contract to maintain an air conditioning system. The contract provides for minor maintenance every 3 months and a major service once a year. On February 10, Albert sets up maintenance work rules as follows:

- Annual maintenance starting on February 1 of the following year with a sort order of 1
- Minor maintenance starting on May 1 with a sort order of 2.

These work orders are generated:

	Minor maintenance rule	Annual maintenance rule
May 1	Work orders generated	NA
August 1	Work orders generated	NA
November 1	Work orders generated	NA
February 1	No work orders generated, but Date of first work order in the next batch advanced to May 1	Work orders generated

Example: Multiple Rules with the Same Sort Orders

Georgia, the pool hygiene manager for Crystal Clear Pools, receives details for a cleaning contract for a new pool installation. This contract includes a monthly pool clean and the application of a chemical treatment every 3 months.

After Georgia adds the customer details and creates a maintenance plan and the pool asset, she sets up two maintenance work rules:

- A rule for the monthly service to take place on the 10th of each month, with a sort order of 1.
- A rule for the 3-month chemical treatment to take place on the 10th of every third month, with a sort order of 1. But because the initial treatment was applied when the pool was installed, Georgia sets the **Date of first work order in the next batch** 3 months in the future.

These work orders are generated:

	Monthly service rule	Three-month chemical treatment rule
First month	Work orders generated	NA
Second month	Work orders generated	NA
Third month	Work orders generated	Work orders generated

Edge Cases in Sort Order and the Generate New Batch Upon Completion Setting

When the **Generate new batch upon completion** option is selected and a maintenance work rule with the lowest sort order value is eligible for a generation but its last work order is incomplete, the maintenance work rule's work order isn't generated. The rule's **Date of first work order in the next batch** is advanced as though it was generated. Then:

- If there are other maintenance work rules with the lowest sort order value eligible for generation, work orders corresponding to these rules are generated else,
- If there are maintenance work rules with a higher sort order value eligible for generation, work orders corresponding to these rules are generated.

When the maintenance work rule's last work order is marked as complete, the rule will be considered for generation in the next generation cycle.

Understanding the Work Order Generation Limit

The maximum number of work orders that can be generated per maintenance plan is 2,600. As a result, there's a practical limit of 2,600 maintenance assets per maintenance plan.

The 2600 limit refers to the number of work orders generated per plan per each round of work order generation. It doesn't count the work orders already generated in the previous round of generation. This limit depends on the number of maintenance assets, the eligible maintenance work rules, their recurrence pattern, and the generation timeframe of the maintenance plan.


The limit is further reduced when:

- using maintenance work rules, there are multiple maintenance work rules on the maintenance plan or its maintenance assets, or
- using maintenance plans alone (without maintenance work rules), **Inclusive of Last Day of Generation Window** is in effect, and more work orders could be generated for the last day.

 **Note:** A maintenance plan with a maintenance work rule using COUNT is limited to 2,000 maintenance assets. If such a maintenance plan has more than 2,000 maintenance assets, no work orders are generated.

 **Example: Work Order Generation Limit** If a maintenance plan has 1 maintenance work rule (MWR), and 5 maintenance assets (MA), and the recurrence pattern is daily:

- If the generation timeframe is **1 year**, then each generation at a **maximum** generates $5 \text{ (MA)} \times 365 = 1825$ work orders. So within the 2600 limit.
- However, if the generation timeframe is **2 years**, then each generation at a **maximum** generates $5 \text{ (MA)} \times 365 \times 2 = 3650$ work order. That exceeds the 2600 limit.

 **Note:** Since the maintenance work rule uses a rolling window for work order generation, the maximum is already reached when the maintenance work rule first started generation. In subsequent generations, the number of work orders generated is fewer.

What Happens if Work Order Generation Tries to Create More Than 2,600 Work Orders?

When work order generation tries to create more than 2,600 work orders:

- If maintenance work rules are used, for either automatic or manual generation: doesn't generate work orders and provides an error message. This behavior occurs because, unlike work orders based on maintenance frequency specified in the maintenance plan, the presence of multiple work rules whose generation is determined by sort order could result in partial creation of the required work orders when the 2,600 limit is reached. To rectify, reduce the maintenance plan generation timeframe.
- If manual generation for maintenance plan with frequencies is used: doesn't generate work orders and provides an error message. To rectify, reduce the maintenance plan generation timeframe.
- If automatic generation for maintenance plans with frequencies is used: generates 2,600 work orders and posts a message on chatter advising that the limit was reached. No further action is needed.

What Happens When the Option to Generate One Asset to One Work Order Line Item is Selected?

When the option to **Generate One Asset to One Work Order Line Item** is selected:

- If maintenance work rules are used, the system puts the limit on the count of work order line items if generating work order line items and on the count of work orders if there are only work orders generated. Take the case where a plan has 2,600 assets each with 3 maintenance work rules for generation. Because of the limit, we report an exception when there are more than 2,600 work order line items generated.
- If maintenance plans with frequencies are used, 2,600 work order line items are generated. If all the maintenance assets have the same next suggested maintenance date, one work order is generated. If the maintenance assets have different next suggested maintenance dates, then work order is generated for each of the next suggested maintenance dates.

Working with COUNT and UNTIL

Where you have an asset with several maintenance work rules, each with different sort orders, that you want to start and end together, we recommend you use UNTIL rather than COUNT. COUNT only counts work orders generated from the maintenance work rule. So maintenance work rules with higher sort order value don't always generate work orders on the intended end date, resulting in these work order rules ending later than those rules with lower sort values.

For example, you want a monthly recurrence that ends in 2 years and set COUNT =24. If any of the 24 work orders weren't generated because another rule had a higher sort order, then work order generation would continue after the 2-year end date, until the count reached 24.

User Access

To generate work orders, a user needs access to maintenance plans, work orders, and service appointments. The user is either the one who generates work orders manually, or is the owner of the maintenance plan for auto generation. We recommend you set up a generic user to eliminate potential problems that can result from changes in personnel.

Field Inheritance

When a work order is created, information is pulled from the maintenance work rules, maintenance asset, and maintenance plan. A maintenance plan can have assets with maintenance work rules defined on the maintenance asset and maintenance plan. However, specific information comes from each entity.

Entity	Information
Maintenance work rule	Date of first work order in the next batch Work Type
Maintenance asset	Account Contact Date of first work order in the next batch* Location Work Type* *If not defined in the maintenance work rule
Maintenance plan	Owner Service Contract Work Type* Date of first work order in the next batch* *If not defined in the maintenance work rule or maintenance asset

Field Inheritance—Date of First Work Order in the Next Batch

When a maintenance work rule is created and you don't enter a value for the Date of first work order in the next batch (`NextSuggestedMaintenanceDate`):

- If the Date of first work order in the next batch is defined on the maintenance asset, the maintenance work rule's Date of first work order in the next batch is set to the asset's Date of first work order in the next batch.
- If the maintenance asset has no Date of first work order in the next batch, the maintenance work rule's Date of first work order in the next batch is set to the maintenance plan's Date of first work order in the next batch.

Later, a maintenance work rule's Date of first work order in the next batch can be set to a new date or cleared. If the rule's Date of first work order in the next batch is empty when the work order generation is triggered, Date of first work order in the next batch is determined using the same logic as setting the value on creation.

Field Inheritance—Work Type

You can define the work type on a maintenance plan. Maintenance plan assets inherit this work type when they're created. You can update the work type on maintenance assets to a different value from the maintenance plan.

If a work type isn't entered when a maintenance work rule is created, it defaults to the work type on the maintenance asset. You can then update or remove the work type for the maintenance work. Work orders or work order line items generated from the maintenance work rule take the maintenance work rule's work type, unless it's blank when they take the maintenance asset's work type.

Rolling Up Work Order Line Items

If the option to generate one work order line item per asset is selected, the system puts one or more work order line items that share a suggested maintenance date into a work order.



Example: Take a maintenance plan where one asset to one work order line item is set with:

- A turbine with weekly on Monday and monthly on the first Monday of the month recurring maintenance work rules with the same sort order (see [Using Sort Order](#) on page 304 for more details).
- A chiller with monthly recurrence on the first Monday of the month.

The weekly turbine maintenance requires work on 6/22, 6/29, 7/6, and 7/13. The monthly turbine and chiller maintenance requires work on 7/6. So on 7/6, there's one work order with three work order line items for the weekly turbine, monthly turbine, and monthly chiller maintenance. But on 6/22, 6/29, and 7/13, there's one work order with one work order line item for the weekly turbine maintenance.



Example: Take a maintenance plan with one work order line item per asset selected and four maintenance assets divided into two sets of two, that share a next suggested maintenance date where:

- Each maintenance asset has a maintenance work rule with recurrence every 6 months.
- The first two maintenance work rules have the same next suggested maintenance date of 7/1.
- The last two maintenance work rules are offset by 1 month, to 8/1, from the first group.

In this case, the:

- First two are grouped in one work order (on 1/July) with two work order line item, and one service appointment.
- Last two are grouped in a separate work order (1/August) with two work order line item, and one service appointment.



Example: There's no rollup of work order line item details into work orders when you select the option for one work order line item to be generated per asset.

Take a maintenance plan with one work order line item per asset selected and two assets. Each asset has a maintenance work rule with different work types. For example, the first asset has a work type for filter replacement that takes 2 hours and the second for battery replacement that takes 5 hours. Each maintenance work has the same frequency and next suggested maintenance date.

If the option for one service appointment per work order line item is selected:

- one parent work order is created
- a work order line item is created for each asset, and
- if the associated work type has auto-create service appointment enabled for work order line items. one service appointment is created for each work order line item. The service appointment duration is populated from the work type, for example 2 hours for a filter replacement and 5 hours for battery replacement.

If one service appointment per work order is selected:

- one parent work order is created
- a work order line item is created for each asset, 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.
- The duration of the service appointment isn't populated.

If you populate the work type of the work order after it's generated, the work order inherits the work type's duration, duration type, and required skills.

Maintenance Work Rule Deletion

When a maintenance work rule is deleted, any association to that maintenance work rule on generated work orders and work order line items is set to NULL. After the maintenance work rule is deleted, it's not possible to determine whether a maintenance work rule generated the work order or work order line item.

Reparenting

The parent item of a maintenance work rule can be changed. But to ensure data integrity, don't reparent a maintenance work rule after it has generated work orders.

Field Tracking and Logging

We recommend that you turn on field tracking and debug logging when you expect to make regular changes to maintenance work rules.

[Create Multiple Maintenance Schedules](#)

To keep assets in tip-top shape, you often need multiple maintenance schedules running at different frequencies.

SEE ALSO:

[Set Up Debug Logging](#)

[Track Field History for Standard Objects](#)

Create Multiple Maintenance Schedules

To keep assets in tip-top shape, you often need multiple maintenance schedules running at different frequencies.

For example, a building maintenance company performs minor maintenance on an air conditioning system every three months and a major service, which includes the three monthly service tasks, once a year. With enhanced preventative maintenance, the service manager sets up the minor maintenance on its three-month schedule and the major service yearly. Field service then generates three quarterly service calls for minor maintenance followed by one annual service call for the major service.

Similarly, a pool maintenance company cleans a pool monthly and applies a chemical treatment every three months. With enhanced preventative maintenance, the pool service manager sets up schedules for both activities. Field service then generates monthly pool cleaning jobs and every three months adds the chemical treatment task.

Multiple maintenance schedules are defined using maintenance work rules. These rules can be defined:

- On maintenance plans to define schedules for all of the plan's maintenance assets that don't have maintenance work rules.


EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- On maintenance assets.

To add maintenance work rules, open a maintenance plan or, from Related Lists, one of its maintenance assets. In the maintenance plan or asset, open the Maintenance Work Rule related list and click New to create a maintenance work rule item.

-  **Note:** Don't use the New button on the Work Order and Work Order Line Item related lists or list views on Maintenance Work Rules. This button creates work order and work order line item records, but it doesn't link the maintenance work rules to the work order and work order line item record. It doesn't establish a link because the MaintenanceWorkRule field on Work Order and Work Order Line Item is read-only. This field can't be updated with the API.

Guidelines for Preventive Maintenance

To optimize technician productivity and increase uptime and mean time to failure of equipment, create preventive maintenance plans for your assets.

Recordset Filter Criteria Fields

The fields that are available when you're defining your recordset filter criteria are based on the filtered object: Asset or Service Appointment. The fields that are visible depend on your field-level security settings and field types. To access a calculated field that isn't available by default, create a custom formula field for the related field.

These field types aren't supported.

- URL
- Multipicklist

EDITIONS

Available in: Lightning Experience

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

- Encrypted string
- Text area

For usage-based maintenance, there are additional considerations.

- You can use a formula to set the value of the asset field specified as the **Usage Field** in the recordset filter criteria rule. However, the asset field specified by the **Next Occurrence Field** in the recordset filter criteria rule can't be a formula field because it's updated by the system.
- Currency field types can't be used to define recordset filter criteria.

Guidelines for Using Asset Attributes and Custom Fields

You can use [asset attributes](#) on page 438, custom integrations, or custom fields to track manually maintained values in your fixed or floating preventive maintenance work orders.

Example: Criteria-Based Maintenance with Asset Attributes

- You set up criteria-based maintenance for an automatic door that has major maintenance performed after 60,000 activations. If you create an asset attribute to record Activation Since Custom Overhaul, you can track the number of activations on each regular maintenance visit. You can create a recordset filter criteria with a rule that activation since last overhaul is greater than or equal to 60,000. Then to generate the overhaul work orders, attach this filter to a maintenance work rule. On completion of the overhaul, the engineer sets the activation since the last overhaul back to zero.
- Also, if you create an asset attribute to track the Months Since Last Overhaul, the recordset filter criteria can generate work orders when:
 - The activation since last overhaul is greater than or equal to 60,000, OR
 - The months since last overhaul is greater than or equal to 6

Activation Since Custom Overhaul

- **CriteriaField:** ActivationSinceLastOverhaul
- **Operator:** >=
- **Value:** 60,000

Months Since Last Overhaul

- **CriteriaField:** MonthsSinceLastOverhaul
- **Operator:** >=
- **Value:** 6

Custom Fields

Alternatively, you can use custom fields to track manually maintained values. If you have assets that provide IoT data, you can use a third-party IoT platform to update your custom asset field. If you don't have an IoT platform, check [AppExchange](#).

Simulating Usage-Based Work Order Creation

To achieve usage-based work order creation using criteria-based preventive maintenance, set up a custom field and update it as the work order is completed. A work order is considered complete when its status falls into one of these status categories: Cannot Complete, Canceled, Completed, or Closed. Such custom fields can include operating hours since last maintenance or cumulative downtime since last maintenance.

Maintenance Work Rule and Recordset Filter Criteria Object Settings

To maintain the correct function of usage or criteria-based maintenance rules, ensure that the Maintenance Work Rule and Recordset Filter Criteria objects have the same full access permissions and sharing rules.

[Create Criteria-Based Maintenance](#)

Create recordset filter criteria using standard or customized fields on assets to identify thresholds that trigger maintenance work.

[Create Usage-Based Maintenance](#)

Use maintenance work rules to create work orders and schedule preventive maintenance based on asset usage.

Create Criteria-Based Maintenance

Create recordset filter criteria using standard or customized fields on assets to identify thresholds that trigger maintenance work.

1. From the App Launcher, click **Recordset Filter Criteria**.
2. Click **New**.
3. Enter a name and description for the criteria.
4. Add filter conditions:
 - a. To define if the criteria is valid if all conditions are true or at least one of the conditions is true, select a **Logical Operator**.
 - b. Select the criteria field, operator field, and fill in the value field. The **Value** input changes depending on the asset field that you choose. For example, picklist fields show the list of available choices.
 - c. To add another condition, click **+ Add Condition**. Continue adding criteria rules as needed.
5. **Save** the filter criteria.
6. Create a criteria-based maintenance work rule:
 - a. In Maintenance Work Rule Type select Criteria-based.
 - b. In Recordset Filter Criteria, search for and select the recordset filter criteria to use.
 - c. Complete the remaining maintenance work rule details as appropriate.
 - d. Save your changes.

[Guidelines for Criteria-Based Maintenance](#)

To optimize technician productivity and increase uptime and mean time to failure of equipment, create criteria-based maintenance work rules for maintenance assets.

Guidelines for Criteria-Based Maintenance

To optimize technician productivity and increase uptime and mean time to failure of equipment, create criteria-based maintenance work rules for maintenance assets.

Watch the video to see how to use maintenance work rules to generate work orders and schedule preventive maintenance based on asset usage.

 [Watch a video](#)

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, create, and update recordset filter criteria

- View, create, and edit on Service Appointments, Shifts, Recordset Filter Criteria, and Recordset Filter Criteria Rules

AND

Delete on Recordset Filter Criteria Rules

View access on the Source Object, Filtered Object, and Filtered Object fields

Watch the video to see how to define maintenance work rules based on product characteristics and maintenance conditions.

 [Watch a video](#)

Next Work Order Generation

Criteria-based maintenance work rules behave as though **Generate new batch upon completion** is set. This behavior applies to the generation of work orders, and, when one work order line item per asset is selected, work order line items.

If an incomplete work order is created from a criteria-based maintenance work rule, no new work orders are created until the active work order is completed. A work order is considered complete when its status is Cannot Complete, Canceled, Completed, or Closed. After the work order is completed, if the criteria are still true at the next work order generation, a new work order is generated.

For example, take a filter with the rule that cumulative downtime is greater than or equal to 1,000 hours. If the cumulative downtime value moves from 982 to 1,024, a work order is created. After that work order is completed, because cumulative downtime is still greater than 1,000, a new work order is created. If **One work order line item per asset** is selected on the maintenance plan, this example applies in the same way to work order line item generation.

Sort Order

The effect of sort order on criteria-based maintenance work rules is independent of sort order on calendar-based maintenance work rules. For example, a criteria-based maintenance work rule with sort order 1 and a calendar-based maintenance work rule with sort order 2 generate work orders, although they have the same suggested maintenance date.

Create Usage-Based Maintenance

Use maintenance work rules to create work orders and schedule preventive maintenance based on asset usage.

1. Create the Recordset Filter Criteria. From the App Launcher, open Recordset Filter Criteria and click **New**.
2. Enter a name and description for the criteria.
3. Select **Maintenance Work Rule** as the Source Object and **Asset** as the Filtered Object.
4. Select whether the filter criteria is valid if all or at least one of the conditions is met.
5. Add filter conditions.
 - a. Select a rule type. Select **Usage** for the type to define a recurring condition at a particular frequency of usage.
 - b. **Usage Field**: Select a field that determines whether the conditions are true.
 - c. **Next Occurrence Field**: This field's value is compared to the Usage field to determine whether the rule is true.
 - d. **Frequency**: Enter a value to set a frequency for maintenance.
 - e. **First Occurrence**: Set the start value. To determine whether the rule is true, this value is compared to the Usage Field value.
 - f. **Last Occurrence**: (Optional) Set the end value.
6. To add another condition, click **+ Add Condition**. Continue adding criteria rules as needed.
7. To generate work orders ahead of the target usage value, select **Add lead-time to usage-based work rules**. In the **Usage Rate** field, enter the daily usage rate of the asset. The unit for the usage rate must be per day.
8. Save the filter criteria.
9. On the Maintenance Asset's related tab, select **New Maintenance Work Rule**.
10. In Maintenance Work Rule Type, select **Criteria-Based**.
11. In Recordset Filter Criteria, search for and select the recordset filter criteria to use.
12. To create work orders on a floating schedule, select **Generate on a floating schedule**.

If the last work order was completed at 8 months, the next work order is targeted at 6 months from completion to 14 months.

If not selected, the recurrence cadence for work orders is fixed. For example, perform work every six months (6, 12, 18) regardless of when the previous work order was completed. If selected, the recurrence cadence for the work orders is floating based on when the last work order was completed.
13. Complete the remaining maintenance work rule details as appropriate.
14. Save your changes.

[Guidelines for Usage-Based Maintenance](#)

To optimize technician productivity and increase uptime and mean time to failure of equipment, create criteria-based maintenance work rules for maintenance assets.

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, create, and update recordset filter criteria

- View, create, and edit on Service Appointments, Shifts, Recordset Filter Criteria, and Recordset Filter Criteria Rules

Edit on the NextOccurrence field on the Asset Filtered Object

Delete on Recordset Filter Criteria Rules

View access on the Source Object, Filtered Object, and Filtered Object fields

Guidelines for Usage-Based Maintenance

To optimize technician productivity and increase uptime and mean time to failure of equipment, create criteria-based maintenance work rules for maintenance assets.

Next Work Order Generation

Usage-based maintenance work rules behave as though **Generate new batch upon completion** is set. This behavior applies to the creation of work orders, and, when one work order line item per asset is selected, work order line items.

For example, if an incomplete work order is created from a usage-based maintenance work rule, no new work orders are generated until the active work order is completed. A work order is considered complete when its status is Cannot Complete, Canceled, Completed, or Closed. After the work order is completed, if the criteria are true at the next work order generation, a new work order is generated.

Work orders are triggered based on the value in the **Next Occurrence** field. If Frequency is < 0, when the value of **Usage Field** is LESS than or equal to the **Next Occurrence** field and is between the values of the **First Occurrence Field** and **Last Occurrence Field**, a work order is generated.

The **Next Occurrence** field is updated with the new value: **Next Occurrence** = Current **Next Occurrence** + **Frequency**.

 **Example:** You have a usage rule of every 1,000 hours that starts at 1,000 hours.


When the usage value moves from 982 to 1024, a work order is generated, and the **Next Occurrence Field** value is updated to 2000 hours.

If the usage moves from 1999 to 2030 and a work order is still open, no new work order is created. However, when the existing work order is complete, a new work order is generated and the **Next Occurrence Field** value is updated to 3000 hours. The **Next Occurrence Field** value is updated every time a work order is generated.

If **One work order line item per asset** is selected on the maintenance plan, this example applies in the same way to work order line item generation.

Sort Order

When applying sort order to criteria-based maintenance rules, the rule with the higher sort order takes priority.

 **Example:** You have two usage rules.

- Rule1 tracks oil changes and maintains every 5 K, starting at 5 K, sort order = 2, and **NextOccurrenceField** is **NextOilChangeMileage**.
- Rule2 tracks oil changes and tire rotation and maintains every 10 K, starting at 10 K, sort order = 1, and **NextOccurrenceField** is **NextOilandTireChangeMileage**.

When a car first reaches 5 K, Rule1 generates a work order at 5 K and updates the **NextOilChangeMileage** to 10 K. When the car reaches 10 K, Rule 1 and Rule 2 try to generate a work order for the next day. However, only Rule 2 generates because it has a higher priority. Rule1 updates its **NextOilChangeMileage** to 15 K, and Rule2 updates its **NextOilandTireChangeMileage** to 20 K.

You can apply sort order within calendar-based rules or criteria-based rules. However, you can't apply sort order across calendar-based and criteria-based rules.

Floating Work Order Generation

When using **Generate on a Floating Schedule**, work orders completed ahead of or behind schedule generate the subsequent work order based on the recurrence cadence.

For example, a floating work order with a six-month recurrence cadence that's completed in May is next scheduled for November. With a fixed schedule, recurring work orders are scheduled at exact intervals based on the work order start date. When you're generating work orders on a floating schedule, the **NextOccurrence** field is updated with the fixed schedule and no work order is generated. After the work order status is updated to **Closed** or **Completed**, the **NextOccurrence** field is updated with the floating schedule based on the current **UsageField** value.

Each status is mapped to a status category. When the work order is updated to a status mapped to the **Closed** or **Completed** status category, the floating work order generation is triggered. Additionally, the recurrence cadence for the work orders is adjusted when the work order or work order line item's status category is changed to **Closed** or **Completed**. When a work order is closed and marked as **Completed**, the **NextOccurrence** field on all upcoming work orders is updated.



Note: The floating work order generation is only triggered if the status is mapped to either the **Closed** or **Completed** Status Category. If you don't map the status to one of those status categories, the next milestone recalculation and update won't happen in the Filtered Object (Asset).

To display this field, from **Setup** enter **Field Service Settings** and select **Update the work order generation based on the completion date of the previous work order**.

Considerations for Work Order Lead Time

Lead time is used to create a **Suggested Maintenance Date** for fixed and floating work orders ahead of the targeted usage value.

To find the **Suggested Maintenance Date** for a UsageCounter rule type, we use this formula if **NextOccurrence** isn't empty:

```
SMD offset by days = (NextOccurrence - CriteriaField) / UsageRate
```

If **NextOccurrence** is null, we use this formula:

```
SMD offset by days = (FirstOccurrence - CriteriaField) / UsageRate
```

If the asset's usage criteria is greater than the expected usage rate (**Next Occurrence**), then the **Suggested Maintenance Date** for the work order is today since the value is greater than or equal to zero. The next occurrence field is updated after closing the work order when lead time rules are used.

For a UsageDuration rule, lead time is the same as the generation horizon.



Example: With Usage Counter Only

Maintenance Plan:

Generation Horizon = 30

Recordset Filter Criteria:

- **RFCR1:** *Usage Counter*
- **UsageField:** *UsageField*
- **NextOccurrence:** *NextOccurrenceField*
- **Frequency:** 4000
- **FirstOccurrence:** 4000
- **Operator:** >=
- **UsageRate:** *UsageRateField*

If the **NextOccurrence** is null, any value greater than 3550 results in true evaluation for this RFCR.

For SMD calculation, let us consider these subexamples:

1

Asset:

- **UsageField:** 3550
- **NextOccurrenceField:** *null*
- **UsageRateField:** 15
- **SMD**
= (4000-3550)/15
= 30 days from today

2

Asset

- **UsageField:** 3880
- **NextOccurrenceField:** 4000
- **UsageRateField:** 15
- **SMD**
= (4000-3880)/15
= 8 days from today

3

Asset

- **UsageField:** 3960
- **NextOccurrenceField:** 4000
- **UsageRateField:** 15
- **SMD**
= (4000-3960)/15
= 3 days from today

4

Asset

- **UsageField:** 4200
- **NextOccurrenceField:** 4000
- **UsageRateField:** 15
- **SMD** = today

**Example: With Usage Duration Only**

Maintenance Plan:

Generation Horizon = 30

Recordset Filter Criteria:

- **RFCR1:** *Usage Duration*
- **UsageField:** *UsageField*

- **NextOccurrence:** *NextOccurrenceField*
- **Frequency:** 365
- **FirstOccurrence:** 365
- **Operator:** >=

Asset

- **UsageField:** 350
- **NextOccurrenceField:** *null*
- **SMD**
= 30 (Same as Generation Horizon)



Example: With Mix Rule Types

Recordset Filter Criteria: *AND*

RFCR1: *Usage Counter*

- **UsageField:** *UsageField1*
- **NextOccurrence:** *NextOccurrenceField1*
- **Frequency:** 4000
- **FirstOccurrence:** 4000
- **Operator:** >=
- **UsageRate:** *UsageRateField*

RFCR2: *Usage Duration*

- **UsageField:** *UsageField2*
- **NextOccurrence:** *NextOccurrenceField2*
- **Frequency:** 365
- **FirstOccurrence:** 365
- **Operator:** >=

Asset

- **UsageField1:** 3960
- **NextOccurrenceField1:** 4000
- **UsageRateField:** 15
- **UsageField2:** 350
- **NextOccurrenceField2:** *null*

Internally, the SMD is evaluated for each RFCR. The SMD is determined based on the logical operator. In this example, each RFCR evaluates to the following lead time offset:

RFCR1.SMD = 3

RFCR2.SMD = 30


Since AND is the operator, the combined SMD = 30 (furthest offset). If we use OR instead of AND, the SMD becomes 3.

Available for Maintenance Assets Only

You can add usage-based maintenance rules to maintenance assets only.


Usage for Multiple Recordset Filter Criteria Rules

If you use the same usage parameter in multiple recordset filter criteria rules, you must use a different **Next Occurrence Field** for each recordset filter criteria rule.

 **Example:** You have a minor maintenance for every 1-K hours and a major maintenance for every 5-K hours. Set up two recordset filter criteria, each with a recordset filter criteria rule. Both recordset filter criteria rules share a usage field: **OpHrsSinceInstall**. However, the minor recordset filter criteria rule and major recordset filter criteria rule refer to a different **NextOccurrenceField**. The minor recordset filter criteria rule triggers at 1 K, 2 K, 3 K, and so on. The major recordset filter criteria rule triggers at 5 K, 10K, 15 K, and so on.

Troubleshooting Work Order Generations in Field Service

If work orders aren't generating as expected these guidelines can help you resolve any issues.

 **Note:** Refer to [Guidelines for Working with Maintenance Work Rules](#) on page 298 for details on how work orders are generated from maintenance work rules.

Watch the video to see how to get an overall view of the work order generation status.

 [Watch a video](#)

Work Order Status

The Work Order Generation Status field on maintenance plans provides a status to help determine how to handle work order generation errors:

- **Completed** indicates that the work orders were created successfully.
- **Unsuccessful** indicates that a work order wasn't generated due to a possible unexpected error.
- **No Work Order Generated** indicates that based on the configuration, no work order was supposed to be created, so no action is required.
- **Needs Review** indicates that to continue the work order creation an action is required.

If the work order generation status is Unsuccessful or Needs Review, the following errors can appear in the Maintenance Plan Chatter feed.


Table 1: Work Order Generation Error Messages

Error	Description	Possible Solutions
Generate new batch upon completion not met	We couldn't generate work orders for this maintenance plan. This maintenance plan uses the Generate new batch upon completion option. When the last work order is marked complete, a new batch of work orders will be generated.	When Generate new batch upon completion is enabled, new work orders won't be created until the last work order from the previous work order generation is completed. A work order is considered complete when its status falls into one of the following status categories: Cannot Complete, Canceled, Completed, or Closed.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Error	Description	Possible Solutions
Suggested maintenance date is out of range	Your dates are out of range, so we couldn't generate work orders for this maintenance Plan's maintenance Assets. For each maintenance asset, check that the Date of the first work order in the next batch is earlier than the maintenance plan's maintenance plan end date. Also check that the date of the first work order in the next batch isn't so obsolete that the Suggested Maintenance Date on the work orders would be in the past.	<p>The end date of the maintenance plan is in the past. On the maintenance asset, update the Date of the first work order in the next batch to a date:</p> <ul style="list-style-type: none"> • Earlier than the maintenance plan's End Date. • That doesn't cause the Suggested Maintenance Date on the work orders to occur in the past.
No work orders to create	We couldn't generate work orders for the maintenance plan because no conditions for generation were met.	<p>Work orders cannot be created for the specified timeframe.</p> <ul style="list-style-type: none"> • Check if the work order dates are in the past. • Check that the COUNT and UNTIL conditions of RRULES are met. <p>If some but not all work orders were generated, check that the criteria and usage conditions on at least one of the maintenance work rules was met.</p>
End date in the past	We couldn't generate work orders because the maintenance plan has reached its end date. To continue generating work orders, update the end date.	The maintenance plan has expired. Update the maintenance plan with a new end date.
Max limit of Work Orders exceeded	We couldn't generate work orders because the work order limit for this maintenance plan was exceeded. To decrease the number of work orders, decrease cadence of work order, decrease the Maintenance Plan Generation Time Frame, or remove some maintenance assets.	<p>The maximum number of work orders you can generate in any run is 2,600. When using auto generation and frequency fields, up to 2600 work orders are created and then the process exits. To reduce the number of work orders generated, update one or more of the following on the maintenance plan:</p> <ul style="list-style-type: none"> • Adjust the generation time frame to increase the span between future work orders generations. • Reduce the number of maintenance assets. Work orders are created per asset, per suggested maintenance date. • Reduce the number of Maintenance Work Rules. • Decrease the frequency to increase the time between work order dates. <p> Note: A maintenance plan with a maintenance work rule using COUNT is limited to 2,000 maintenance assets. If such a maintenance plan has more than 2,000 maintenance assets, no work orders are generated.</p>

Error	Description	Possible Solutions
User does not have access	We couldn't generate work orders because the maintenance plan owner doesn't have permission to create work orders or service appointments. Ask your Salesforce admin for help.	The user does not have rights to create service appointments, work orders or work order line items. Have the Salesforce admin grant rights.
Invalid values for Generation Horizon and Generation Time Frame	We couldn't generate work orders because some of your Maintenance Plan dates are out of range. Enter a maintenance plan Generation Horizon (Days) of 365 or less, and a maintenance plan Generation Time Frame equivalent to 20 years or less.	The date range for the maintenance plan extends beyond the allowed timeframe. <ul style="list-style-type: none"> • Update the Generation Horizon to a value of 365 or less. • Update the Generation Time Frame to 20 years or less.
Missing maintenance work rule after frequency fields migration	We couldn't generate work orders because the maintenance plan's frequency fields are blank, and it has no maintenance work rules on the maintenance plan or any of its Maintenance assets.	The org has hidden the Frequency fields in Setup, but maintenance work rules still need to be set up for the maintenance plan.
Missing maintenance work rule and frequency fields	We couldn't generate work orders because the maintenance plan's frequency fields are blank, and it has no maintenance work rules on the maintenance plan.	The maintenance plan doesn't have a maintenance work rule or frequency fields (Generation time frame and generation time frame type) defined.
Errors due to customization	We generated x of y work orders, a of b work order line items, and c of d service appointments for your maintenance plan. However, some work orders couldn't be generated. To find out why, ask your Salesforce admin. Learn More in Salesforce Help.	Please refer to Determine Whether Customizations are Disrupting Generation for additional solutions.

Resolve Issues that Need Review

When troubleshooting issues that have the **Needs Review** status, complete these steps:

1. Address the issue based on the solution in the "Work Order Generation Error Messages" table.
2. Turn off **Auto-generate work orders** and run manual generation for the work orders.
3. Once the status becomes successful, turn on **Auto-generate work orders**.

Determine Whether Customizations are Disrupting Generation

Work order generation can fail when objects related to the process, such as Work Order or Service Appointment, have customizations. If generation fails, take these steps to determine which of your changes is causing the failure and make corrections. If you don't think your changes are the cause of the generation failure, contact Salesforce Support for assistance.

1. Verify that you can create a work order manually. If manual creation fails, correct any errors.

2. Verify that any custom required fields on the following objects have a default value configured. Default values ensure that the maintenance plan generation process knows what value to set for the custom fields.
 - Work Order
 - Work Order Line Item
 - Asset
 - Service Appointment (if the work order generation includes creating Service Appointment)
 - Assigned Resource (if you have automation to auto-schedule Service Appointments)
3. Verify that custom automation, including triggers, processes, and workflows, on the following objects aren't interfering with the process by disabling them and rerunning work order generation:
 - Maintenance Plan
 - Work Order
 - Work Order Line Item
 - Asset
 - Service Appointment, if the Work Order Generation includes creating Service Appointment
 - Assigned Resource, if you have automation to auto-schedule Service Appointments
4. Verify whether you can generate work orders with custom validation rules on the following objects disabled:
 - Work Order
 - Work Order Line Item
 - Asset
 - Service Appointment
 - Assigned Resource
5. Verify whether you can generate work orders after deactivating custom lookup filters on fields from the following objects:
 - Work Order
 - Work Order Line Item
 - Asset
 - Service Appointment
 - Assigned Resource

Get More Information Using Debug Logs

To get more information on why generation may be failing, turn on debugging, Work order generation is an automatic process that uses an automated process user in the background. By default this process doesn't generate debug logs. To enable debug logging for the automated process user:

- From Setup, in the Quick Find box, enter *Debug Logs*, and then select **Debug Logs**.
- Click **New**.
- In Traced Entity Type select Automated Process.
- Enter a start date for the logging period.
- In **Debug Level** choose SFDC_DevConsole.
- Save your changes.

You can also make these settings in the Developer Console.

When you generate these logs, note the following:

- Allow up to 24 hours for the logs to become available.
- Use the finest log level for the Automated Process log.
- Review all logs and inspect their content. This review should include all logs with the success status, as exceptions are handled during maintenance plan generation and don't result in the logging of unhandled exceptions.

SEE ALSO:

[Set Up Debug Logging](#)

Manage Field Service 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 Your Shift Schedule in Field Service](#)

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.

[Add Field Service Shifts](#)

Shifts in Field Service define periods of time when you need to have workers available. Shifts help you manage standard availability, like weekday and weekend shifts, or flexible periods such as occasional overtime. Use predefined patterns to quickly make a set of standard shifts for weekdays and weekends.

[Create Filters to Match Field Service Appointments and Shifts](#)

Designate shifts for appointments that meet your criteria in Field Service. Create Recordset Filter Criteria based on service appointment field values, then add the filter to a shift so that only relevant appointments get scheduled.

[Assign and Update Field Service Shifts](#)

In Field Service, ensure that shifts are covered by assigning them to a service resource. You can assign shifts individually or update the assignee and status in bulk.

[Color-Code Field Service Shifts](#)

Use a background color to identify different types of shifts in the Field Service schedule view and dispatch console. Background colors let you add visual information that works along with status-based horizontal color bars in shift cells. You can add a background color to a shift or a shift template.

[Nonstandard Field Service Shifts](#)



Nonstandard shifts in Field Service are shifts not sought by mobile workers for various reasons, such as inconvenient hours or increased workload. Identifying and marking shifts as non-standard helps the shift planner assign shifts in a more equitable and balanced way, which can reduce dissatisfaction and attrition.

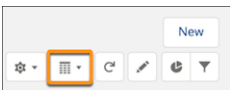
[Field Service Guidelines for Shift Availability](#)

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.

Manage Your Shift Schedule in Field Service

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 .



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

- The maximum supported shift duration is 23 hours and 59 minutes.
- 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.
- On 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.

Add Field Service Shifts

Shifts in Field Service define periods of time when you need to have workers available. Shifts help you manage standard availability, like weekday and weekend shifts, or flexible periods such as occasional overtime. Use predefined patterns to quickly make a set of standard shifts for weekdays and weekends.

[Create Flexible Work Shifts](#)

Create shifts that define availability for your mobile workers in Field Service. 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.

[Create Shifts from a Pattern](#)

In Field Service, create a set of shifts from a predefined pattern of shift templates. Assign a service territory and resource to quickly prepare the schedule.

Create Flexible Work Shifts

Create shifts that define availability for your mobile workers in Field Service. 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.
 - a. Click **New**.
 - b. From the schedule view, hover in an empty space and click **+ New Shift**.

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, create, and update shifts:


- View, create, and edit on Shifts, Service Territories, Service Resources, Service Territory Memberships

To add job profiles to shifts:

- View on Job Profiles

To add recordset filter criteria to shifts:

- View on Recordset Filter Criteria

Shifts		Resources	
SUN, OCT 13	MON, OCT 14	TUE, OCT 15	WED, OCT 16
▼ Carpentry			
▼ Electrical			
	10:30 AM-7:30 PM Confirmed · Brian Pitt	11:00 AM-7:00 PM Confirmed · Brian Pitt <div style="border: 2px solid orange; padding: 5px; display: inline-block;"> + New Shift  </div>	6:00 AM-4:00 PM Confirmed · Brian Pitt 7:30 PM-9:30 PM Tentative
▼ Plumbing			

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.

SEE ALSO:

[Build Repeating Shift Patterns](#)[Field Service Guidelines for Shift Availability](#)

Create Shifts from a Pattern

In Field Service, create a set of shifts from a predefined pattern of shift templates. Assign a service territory and resource to quickly prepare the schedule.

1. From the App Launcher, click **Shifts**.
2. Click **New from Pattern**.
3. Select the shift pattern.
4. Select a start date.
5. Do one of the following:
 - a. To end the pattern on a specific date, choose **On a date**.
 - b. To repeat the pattern, choose **After a number of occurrences** and enter the number of times to repeat it.

New Shifts from Pattern

Select Shift Pattern

To create new shifts, select a shift pattern. Shift patterns are made up of shift templates to define a set or recurring cycle of shifts.

* Shift Pattern

Weekly Hours

Pattern Settings

* Scheduling Start

Jan 4, 2021

* Scheduling End

On a date

After a number of occurrences

Occurrences

4

Service Territory

San Francisco

Assigned Service Resource

Search Service Resources...

Cancel Create Shifts

6. Optionally, select a service territory. If you select a territory, you can also assign a service resource.
7. Click **Create Shifts**.

SEE ALSO:

[Build Repeating Shift Patterns](#)

[Field Service Guidelines for Shift Availability](#)

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, create, and update shifts:

- View, create, and edit on Shifts, Job Profiles, Service Territories, Service Resources, Service Territory Memberships

Create Filters to Match Field Service Appointments and Shifts

Designate shifts for appointments that meet your criteria in Field Service. Create Recordset Filter Criteria based on service appointment field values, then add the filter to a shift so that only relevant appointments get scheduled.

1. In the App Launcher, click **Recordset Filter Criteria**.
2. In the Recordset Filter Criteria list view, click **New**.

3. Enter a name and description for the criteria.
4. In the Source Object field, select **Shift**.
5. In the Filtered Object field, select **Service Appointment**.
6. Select **Active**.
7. In the Conditions section, select the relevant condition for when the recordset filter criteria is valid.
8. Add filter conditions.
 - a. Select the Criteria Field, the Operator, and the field Value to match on. The Value input changes depending on the field you select. For example, picklist fields show the list of available choices.
 - b. Add another condition if you need to.
9. Save the recordset filter criteria.

[Guidelines for Recordset Filter Criteria](#)

Field Service filter criteria let you match records in one object against records in another. For example, you can choose criteria to filter which service appointments can be scheduled during a shift.

SEE ALSO:

[Guidelines for Recordset Filter Criteria](#)

[Guidelines for Recordset Filter Criteria](#)

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, create, and update recordset filter criteria

- View, create, and edit on Service Appointments, Shifts, Recordset Filter Criteria, and Recordset Filter Criteria Rules

AND

Delete on Recordset Filter Criteria Rules

Guidelines for Recordset Filter Criteria

Field Service filter criteria let you match records in one object against records in another. For example, you can choose criteria to filter which service appointments can be scheduled during a shift.

Recordset Filter Criteria Considerations

Keep these considerations in mind when you create and edit recordset filter criteria.

- Only Recordset Filter Criteria marked Active are used in scheduling.
- When you add multiple filter conditions, only appointments matching all the conditions can be scheduled.
- The Value input changes depending on the service appointment field you choose. For example, picklist fields show the list of available choices.
- You can't match on text field values that include apostrophes ('), commas (,), or double quotation marks (").
- Users without access to a service appointment field used in a filter condition don't see the field name or value. They also can't edit or delete the filter condition.
- When you use inline edit on a recordset filter criteria, the filter conditions are shown in the related list. You can manage filter conditions individually from the related list. Or to see all the filter conditions in one place, use the Edit action.
- The Recordset Filter Criteria field must be added to the Shift page layout.
- After you add a custom field to the filtered object, it can take around 15 minutes for the new field to appear in the Criteria Field picklist.
- You can add a maximum of 5 considerations to the Recordset Filter Criteria field.
- The asset fields Availability, Reliability, Average Time to Repair, and Average Time Between Failures are calculated internally, so they can't be used to define Usage-Based, Usage-Counter, or Usage-Duration rule types.

Guidelines for Custom Logic

- Build the filter logic with parentheses and the AND or OR Boolean operators. To group conditions, use parentheses around the parameters, for example 1 AND (2 OR 3). If you add another condition, the custom logic is updated automatically to 1 AND (2 OR 3) AND 4.
- Every index must have a corresponding recordset filter criteria rule, but every rule doesn't need to be used in the custom logic.
- If no custom logic is defined, all recordset filter criteria rules are treated with an AND, meaning all conditions must be True.
- You can't delete a recordset filter criteria rule that's referenced in custom logic. Alternatively, you can follow these steps:
 1. Update RFC.CustomLogic as empty, or remove the index reference in custom logic.
 2. Delete the recordset filter criteria rule.

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, create, and update recordset filter criteria for shifts

- View, create, and edit on Recordset Filter Criteria and Recordset Filter Criteria Rules

AND

View on the filtered object, source object, and filtered object's fields

AND

Delete on Recordset Filter Criteria Rules

3. Update RFC.CustomLogic with the correct value.

SEE ALSO:

[Create Filters to Match Field Service Appointments and Shifts](#)

[Set Up Designated Work for Time Slots When Not Using Enhanced Scheduling and Optimization](#)

[Field Service Guidelines for Shift Availability](#)

[Create Filters to Match Field Service Appointments and Shifts](#)

[Field Service Guidelines for Shift Availability](#)

Assign and Update Field Service Shifts

In Field Service, ensure that shifts are covered by assigning them to a service resource. You can assign shifts individually or update the assignee and status in bulk.

[Find Shift Candidates](#)

Want to assign an overtime shift in a hurry? Or swap shift assignments due to a worker calling in sick? The Get Candidates action helps you quickly find a resource who is best-matched to work on an individual shift.

[Assign Shifts and Update the Status in Bulk](#)

Save time and effort with mass updates for shifts. Quickly assign a group of shifts to service resources who are matched based on your business' shift scheduling rules and their own shift scheduling preferences.

SEE ALSO:

[Prepare Your Org for Shift Scheduling](#)

[Create a Scheduling Objective for Shifts](#)

[Create a Scheduling Rule for Shifts](#)

Find Shift Candidates

Want to assign an overtime shift in a hurry? Or swap shift assignments due to a worker calling in sick? The Get Candidates action helps you quickly find a resource who is best-matched to work on an individual shift.

1. Open **Shifts** in the App Launcher.
2. Select a listview other than Recently Viewed.
3. Set the Display As icon to **Schedule**.
4. Hover over the shift you'd like to assign, and click **Get Candidates**.
The list of candidates is sorted according to how well they meet your service objectives.
5. Select the resource to assign, then save your changes.

SEE ALSO:

[Prepare Your Org for Shift Scheduling](#)

Assign Shifts and Update the Status in Bulk

Save time and effort with mass updates for shifts. Quickly assign a group of shifts to service resources who are matched based on your business' shift scheduling rules and their own shift scheduling preferences.

1. Open **Shifts** in the App Launcher.
2. Click **Mass Shift Update**.
3. Select whether to update the status, assign shifts, or do both.
4. Define criteria that selects the shifts to update. You can specify dates, service territories, and job profiles.
5. If you're updating the status, specify the current status and the new status.
6. Do one of the following:
 - a. If you're updating the assignee and status, click **Assign and Update Status**.
 - b. If you're updating the assignee, click **Assign**.
 - c. If you're updating the status, click **Update Status**.

A background process starts that looks for shifts that match the criteria and takes the appropriate action. To learn if the process is completed, open the Shift Scheduling Operation record. The record shows how many shifts were considered, how many were successfully processed, and how many failed.

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 assign shifts:

- Field Service Standard
AND
View and edit on shifts

To appear in the list of service resource candidates:

- Field Service Scheduling

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 mass update shifts:

- Field Service Standard
AND
View and edit on Shifts

To appear in the list of service resource candidates:

- Field Service Scheduling

Color-Code Field Service Shifts

Use a background color to identify different types of shifts in the Field Service schedule view and dispatch console. Background colors let you add visual information that works along with status-based horizontal color bars in shift cells. You can add a background color to a shift or a shift template.

1. Edit the shift or shift template for which you want to add a background color. When you add a background color to a shift template, shifts created from the template inherit the background color.
2. Select a color in the Background Color field. You can use the color picker or enter a value in hexadecimal format.
3. Review the shift cell preview, then save your work.

Keep these considerations in mind for managing shift colors:

- To avoid visual clutter in the schedule view and dispatcher console, limit the number of background colors that you use. For example, pick 3-5 colors that your shift managers use to differentiate shift types.
- The text color changes automatically depending on the background color that you select. The shift text color is either white or black, whichever creates the highest color contrast to promote readability and accessibility.
- The shift status determines the color of a horizontal bar in each shift cell. You can't update the default color scheme or replace it with a custom palette.
- Tentative shifts that don't have a background color are highlighted in orange.
- Within a shift, the shift cell preview updates only if a service resource is assigned.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To view, create, and edit shifts:

- View, create, and edit on Shifts, Job Profiles, Service Territories, Service Resources, Service Territory Memberships

To view, create, and edit shift templates:

- View, create, and edit on Shifts Templates, Job Profiles, Service Territories, Service Resources, Service Territory Memberships

Nonstandard Field Service Shifts

Nonstandard shifts in Field Service are shifts not sought by mobile workers for various reasons, such as inconvenient hours or increased workload. Identifying and marking shifts as non-standard helps the shift planner assign shifts in a more equitable and balanced way, which can reduce dissatisfaction and attrition.

Marking Shifts as Nonstandard

- To mark a shift as nonstandard, select the **Non-Standard** checkbox when creating or editing a shift.
- To mark a shift template as nonstandard, select the **Non-Standard** checkbox when creating or editing a shift template.

Identifying Nonstandard Shifts

Shifts marked as nonstandard are flagged in the various views. In the shift schedule view and the Gantt, nonstandard shifts are flagged with a red icon.

In the table view, add the Non-Standard field to see which shifts aren't standard.

 **Note:** The Dispatcher console Gantt is a managed package feature.

Limiting Monthly Nonstandard Shifts

Managers and planners can restrict how many nonstandard shifts are assigned monthly to each worker.

1. Specify the maximum number of monthly non-standard shifts in a scheduling constraint on each service resource or service territory.
2. Create a scheduling rule using the Limit Non-Standard Shifts rule type.

When assigning service resources to shifts, the scheduling logic looks for individuals that haven't reached their monthly limit for nonstandard shifts.

Field Service 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.

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.

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, create, and edit shifts:

- View, create, and edit on Shifts, Job Profiles, Service Territories, Service Resources, Service Territory Memberships

To view, create, and edit shift templates:

- View, create, and edit on Shifts Templates, Job Profiles, Service Territories, Service Resources, Service Territory Memberships

EDITIONS

Available in: Lightning Experience

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

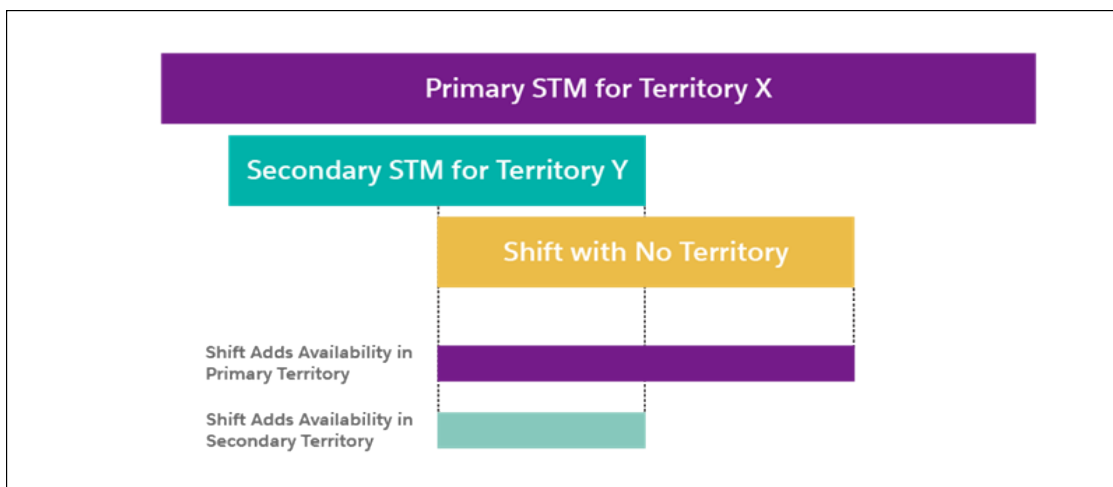
- If you're not using Enhanced Scheduling and Optimization, when you schedule designated shifts for secondary service territories, use optimization rather than scheduling operations. Scheduling operations, such as Book Appointments or Get Candidates, don't consider designated shifts with secondary service 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.

Shifts and worker availability

- Shifts always add availability.
- Shifts have priority over overlapping time slots.
- 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.
- 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.
- Shifts with designation don't take precedence over shifts without designation.

- 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.
- 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.
- When you use Enhanced Scheduling and Optimization, if a service appointment doesn't have a territory and a shift with designation is configured, the service appointment must match the designation in order to be scheduled. If a resource has primary and secondary territories and each territory has a shift with a different designation, the service appointment without territory must match both designations.

Scheduling processes

- 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.
- When you use the Get Candidates and Mass Shift Update features, the scheduling logic takes into account any scheduling rules and objectives.
- Scheduling and optimization match shifts to service appointments according to the shift's filter criteria. Recordset filter criteria help you narrow the scope so that only appointments matching the criteria get scheduled.

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).

The screenshot displays the Salesforce Field Service interface. On the left, a list of candidates is shown for service appointment SA-5963. The candidates include Acme Partners (3 Members), Alan Reed (Field Supervisor), Harry Long (Installation Expert), Matthew Parker (Electric Engineer), and Ralph Clark (Water Systems Specialist). Each candidate has a status indicator (e.g., 45/100, 100/100, 81/100, 49/100, 48/100). The main area is a Gantt chart showing resource utilization over three days: Saturday, November 9, 2019; Sunday, November 10, 2019; and Monday, November 11, 2019. The chart shows utilization percentages and booked hours for each resource. Two orange boxes with numbers 1 and 2 highlight specific resource slots in the Gantt chart.

SEE ALSO:

- [Guidelines for Recordset Filter Criteria](#)
- [Guidelines for Creating Operating Hours for Field Service](#)
- [Guidelines for Recordset Filter Criteria](#)
- [Guidelines for Creating Service Territories for Field Service](#)
- [Reserve Time Slots for Designated Types of Work](#)
- [Create Flexible Work Shifts](#)
- [Create Shifts from a Pattern](#)

Manage Field 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.

[Get Started with Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

[View a Field 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 Field 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.

SEE ALSO:

[Set Up Your Field Service Workforce](#)


[Create Service Resources for Field Service](#)

[Service Resource Fields for Field Service](#)

Get Started with Field Service 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 dropdown 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 339.

Considerations for time sheets:

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To enable time sheets:

- [Customize Application](#)

- 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.
- Sharing button isn't available for time sheets.

[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.

SEE ALSO:

[Use Time Sheets in the Field Service Mobile App](#)

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.

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 create time sheets:

- Create on time sheets

To view time sheet entries:

- Read on time sheets

To create, update, or delete time sheet entries:

- Edit on time sheets

New Time Sheet Template

Information

<p>* Label</p> <input style="width: 90%;" type="text" value="Mon-Fri Biweekly"/>	<p>* Name</p> <input style="width: 90%;" type="text" value="Mon_Fri_Biweekly"/>
<p>* Start Date</p> <input style="width: 90%;" type="text" value="4/1/2019"/>	<p>* Frequency</p> <input style="width: 90%;" type="text" value="Every Two Weeks"/>
<p>* Work Week Start Day</p> <input style="width: 90%;" type="text" value="Monday"/>	<p>* Work Week End Day</p> <input style="width: 90%;" type="text" value="Friday"/>

Description

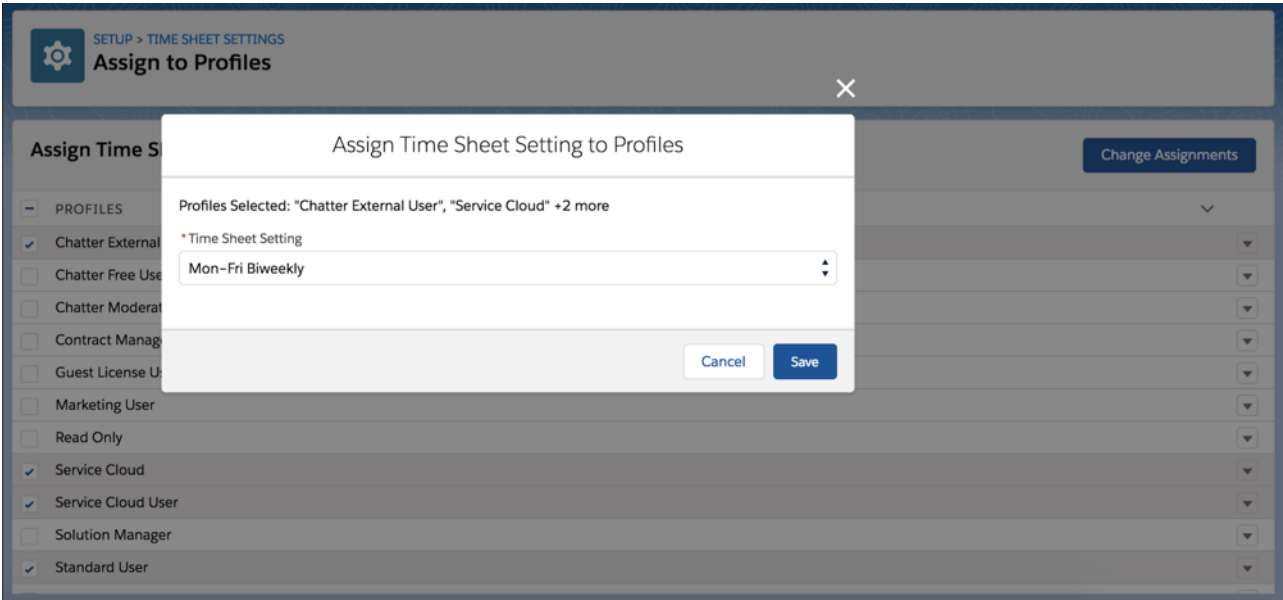
Biweekly time sheet for service resources who work Monday through Friday.

*** Active**

- a. For **Label**, enter a descriptive name for the template so that you can distinguish it from others.
- b. For **Name**, enter an API name for the template that uses underscores instead of spaces.
- c. 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.
- d. 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.
- e. For **Work Week Start Day**, select the day that you want each work week to begin on.
- f. For **Work Week End Day**, select the day that you want each work week to end on.
- g. Enter a description for the time sheet template.
- h. 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.

SEE ALSO:

[Time Sheet Fields](#)

[Time Sheet Fields](#)

[Use Time Sheets in the Field Service Mobile App](#)

[Use Time Sheets in the Field Service Mobile App](#)


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.

When modifying recurring absences, you can only modify them one at a time. For example, if a resource had a regularly scheduled appointment every Wednesday, and now that appointment occurs every Thursday, you must create a new recurring absence. If they must change their appointment time and date only a few times, you can modify individual absences in the pattern.

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 available on Break resource absence or Recurring absence types.

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.

*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. With Enhanced Scheduling and Optimization, optimization and scheduling actions use the location of the last event (Service Appointment or Resource Absence) that has a location to calculate the travel time to the next event.

Non Availability absences are shown on the Gantt with a "no entry" icon, while Break absences are shown with a cup icon. Update the Gantt Color field on a resource absence to customize its color on the Gantt.

USER PERMISSIONS

To view resource absences:

- Read on service resources

To create and update resource absences:

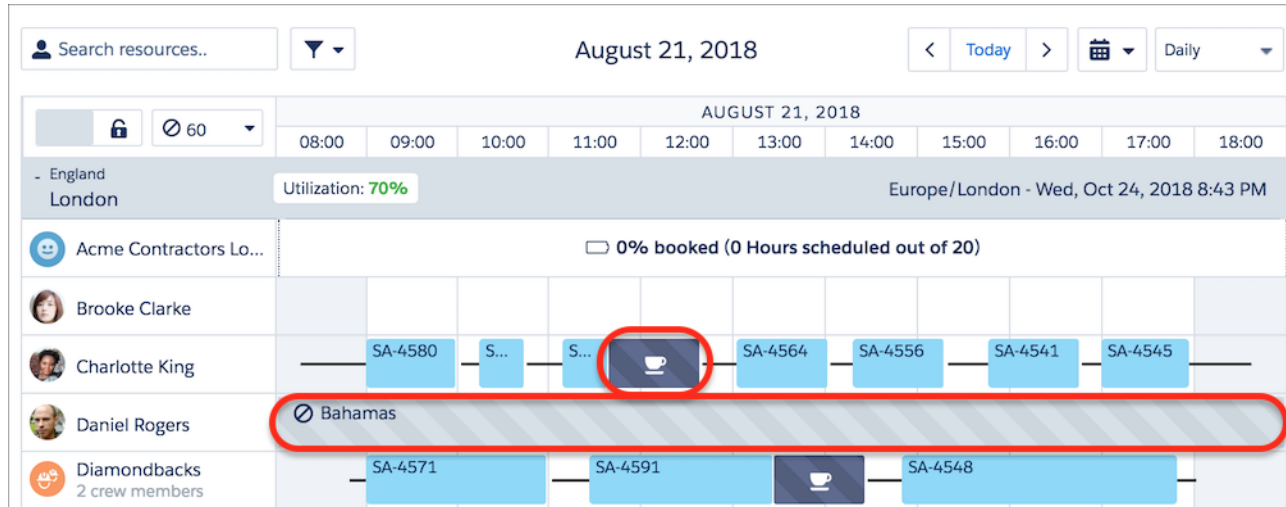
- Read on service resources

To add or edit picklist values:

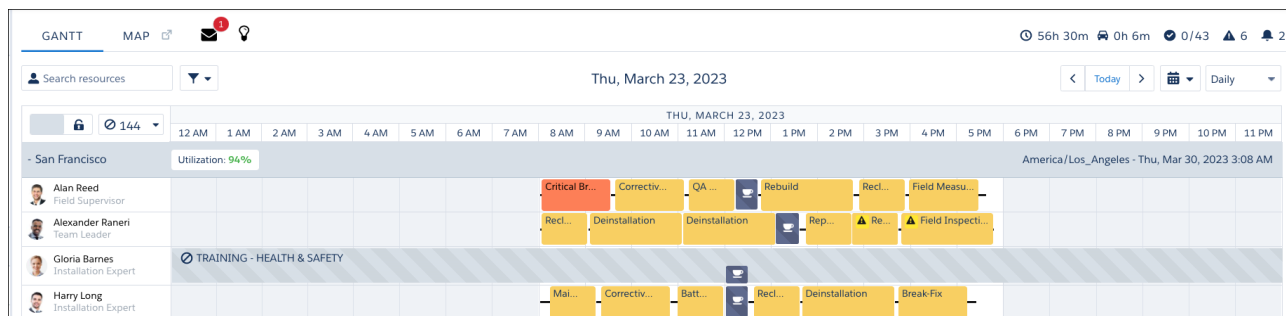
- Customize Application

To customize the Field Service managed package:

- Customize Application



With Enhanced Scheduling and Optimization, a lunch break is created when there's a full-day resource absence.



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.

SEE ALSO:

- [Create Resource Absences in the Field Service Mobile App](#)
- [Work with Resource Absences](#)
- [View a Field Service Resource's Calendar](#)
- [Create Resource Absences in the Field Service Mobile App](#)
- [Work Rule Type: Service Resource Availability](#)
- [Service Resource Fields for Field Service](#)
- [Show Resource Absences on the Map](#)

View a Field 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.

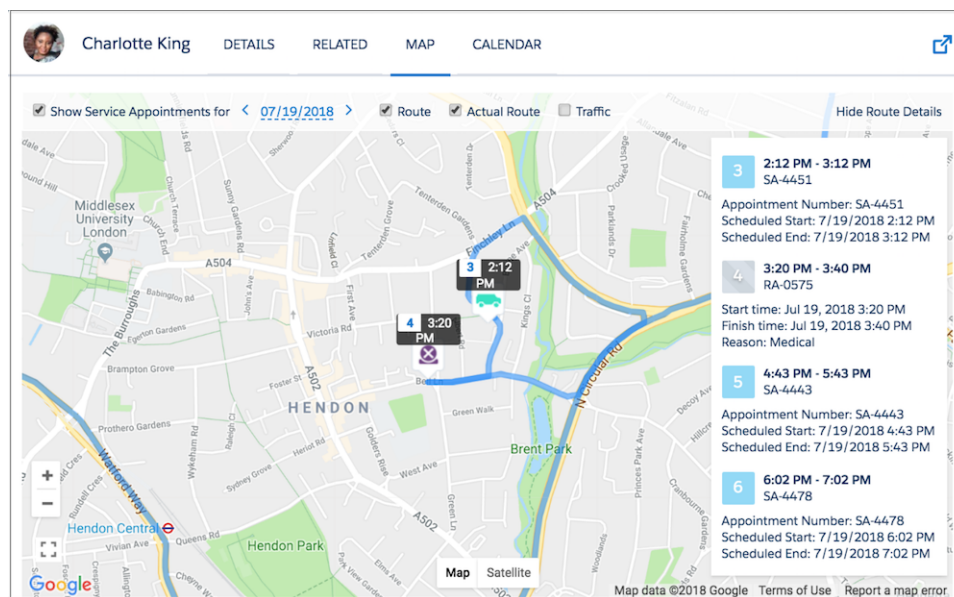
 **Important:** To view travel routes, [enable street-level routing](#).

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.

EDITIONS


Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

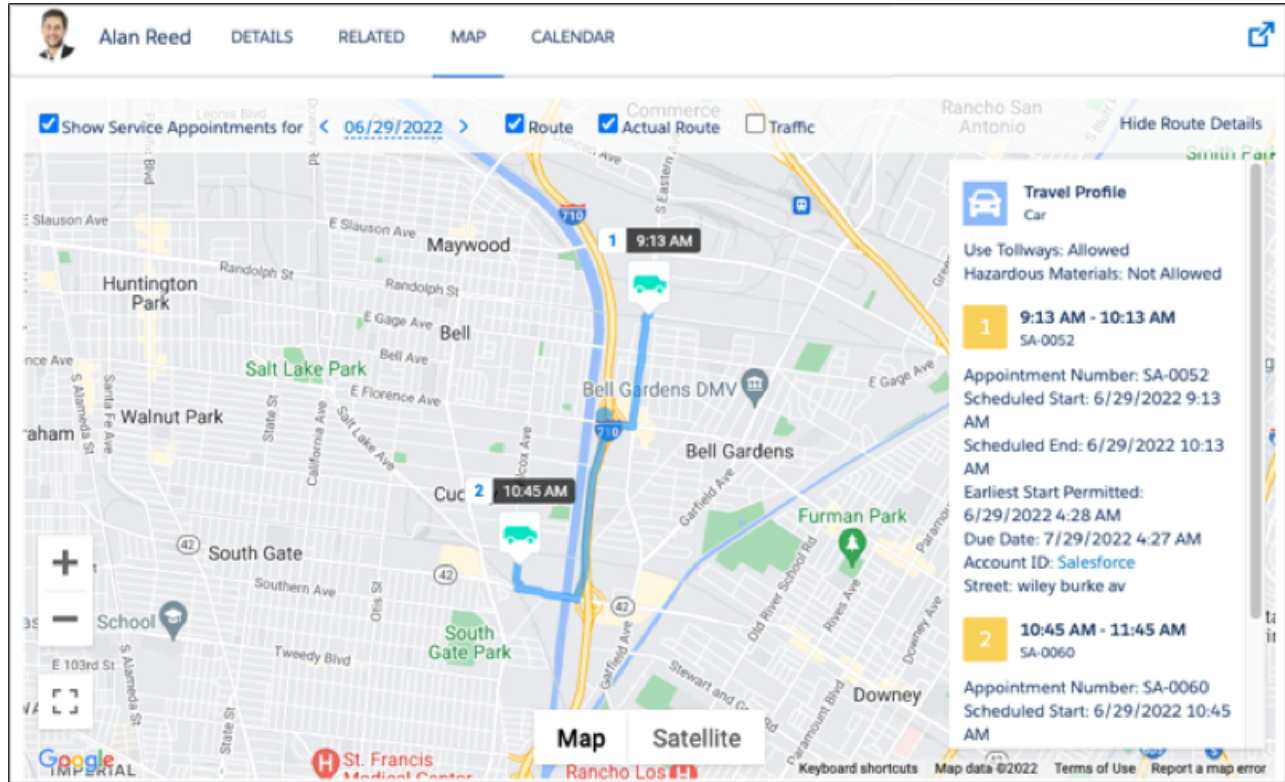


At the top of the map, select which date to show, and choose one or more types of data to display: **Route** (shown in blue), **Actual Route** (shown in pink), and **Traffic**. The actual route can be shown only if history tracking is set on the service resource's Last Known Location field and geolocation tracking is turned on for them. See [Field History Tracking](#).

A truck icon signifies an appointment. An 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. The pane shows the travel profile with details such as the vehicle type and the route according to the selected travel mode. For example, quickly see whether the route includes the use of toll roads or whether hazmat considerations exist. The travel profile is shown when you're using Enhanced Scheduling and Optimization and a travel mode is assigned to that territory or territory member. 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](#).

SEE ALSO:


- [Set Up Routing for Travel Time Calculations](#)
- [Track Service Resource Geolocation with the Field Service Mobile App](#)
- [Set Up Travel Modes](#)
- [Working in the Field Service Dispatcher Console Map](#)

View a Field 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.

 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

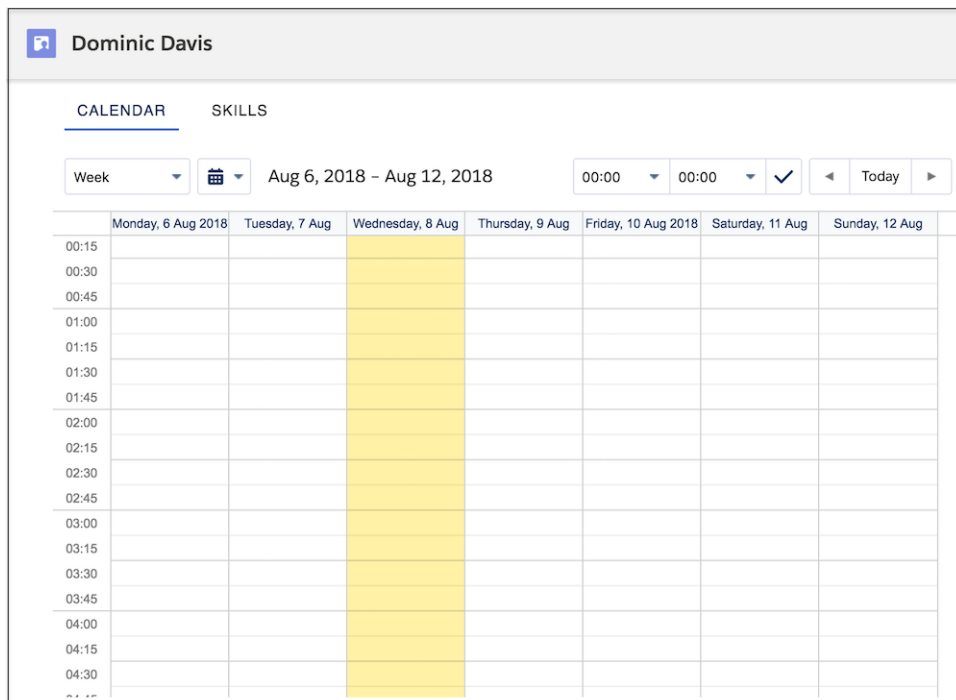
USER PERMISSIONS

To edit field sets:

- Customize Application

To edit page layouts:

- Customize Application



Dominic Davis		CALENDAR		SKILLS			
Week	Aug 6, 2018 - Aug 12, 2018	00:00	00:00	Today			
	Monday, 6 Aug 2018	Tuesday, 7 Aug	Wednesday, 8 Aug	Thursday, 9 Aug	Friday, 10 Aug 2018	Saturday, 11 Aug	Sunday, 12 Aug
00:15							
00:30							
00:45							
01:00							
01:15							
01:30							
01:45							
02:00							
02:15							
02:30							
02:45							
03:00							
03:15							
03:30							
03:45							
04:00							
04:15							
04:30							

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 tool tip 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.

SEE ALSO:

[Work Rule Type: Service Resource Availability](#)

[Create Service Resource Absences for Field Service](#)

[Show Resource Absences on the Map](#)

Manage Field 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: both Salesforce Classic (not available in all orgs) 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
- AND
- Read on service resources

To create service crews using the crew management tool:

- Create on service crews
- AND
- Create on service resources
- AND
- Edit on service territories

To create, update, or delete service crew members:

- Edit on service crews

Service Resource
Trailblazers

User Resource Type **Crew** Active

Related **Details**

Information

Name	Trailblazers	Active	<input checked="" type="checkbox"/>
User	<input type="text"/>	Include in Scheduling Optimization	<input type="checkbox"/>
Service Crew	Trailblazers	Travel Speed	<input type="text"/>

- 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.

Field Service Home Reports Field Service Accounts Work Orders Service Appointments Service Resources **Crew Management** More

Policy: Customer First

New Service Crew

Wed, July 31, 2019

Search service resources...

0 resources selected

- San Francisco
 - Janice Gonzales, Expert
 - Ralph Clark, Installer
 - Louise Martin, Installer
- SF Showroom
- Los Angeles
 - Martino Castanon, Installer
 - Paul Morrison, Installer
 - Pam Lawison, Expert
 - Alan Reed, Installer
 - Lamar Smith, Installer
- LA Showroom

WED, JULY 31, 2019

12 1 AM 2 AM 3 AM 4 AM 5 AM 6 AM 7 AM 8 AM 9 AM 10 11 12 1 PM 2 PM 3 PM 4 PM 5 PM 6 PM 7 PM 8 PM 9 PM 10 11

- San Francisco America/Los_Angeles (GMT-7)

SF Roof Repair Crew (Crew Size: 3) Match Crew Skills

Crew Schedule

Janice Gonzales, Expert SCM-0001

Ralph Clark, Installer SCM-0002

Louise Martin, Installer SCM-0003

- Los Angeles America/Los_Angeles (GMT-7)

Erin's Dream Team (Crew Size: 3) Match Crew Skills

Crew Schedule

Martino Castan... Installer SCM-0004

Pam Lawison, Expert SCM-0006

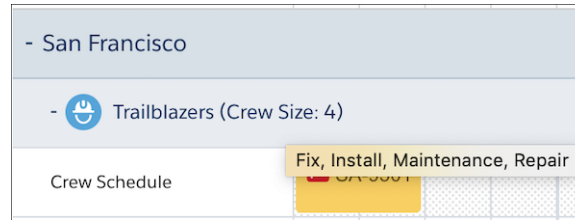
Lamar Smith, Installer SCM-0005

- In the top-right corner, select a date and number of days to display.
- In the sidebar, click the map icon to view a list of service territories with active service crews. Select service territories whose crews you want to see and click **Save**. After you select service territories, each crew's schedule and members appear in the chart.

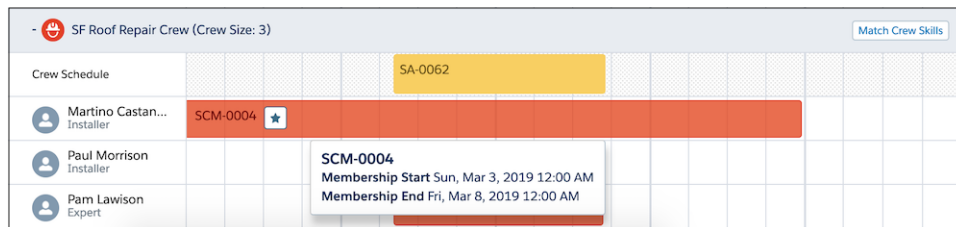
Now that your dates and service territories are selected, it's time to manage crew membership.

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.

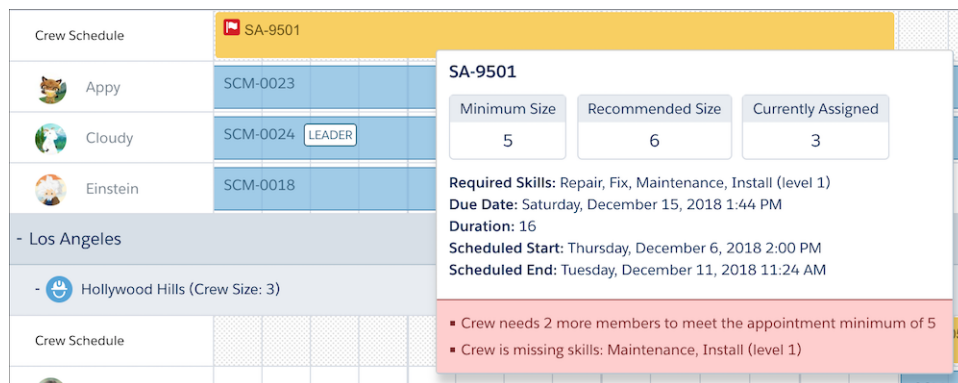


Hover over a service crew membership in the chart to view the membership start and end dates. Crew leaders appear with a star.



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. You can determine which details to show using the [Crew Management Tooltip field set](#) on page 477.

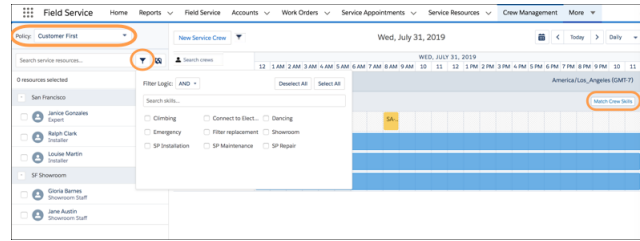


Double-click an appointment to open a window that shows the appointment's fields and its parent record's fields and related records.

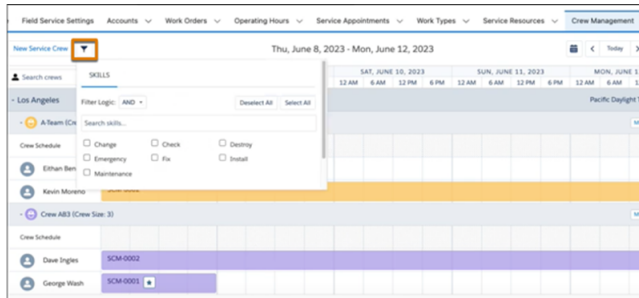
Find the Right Crew Member

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.

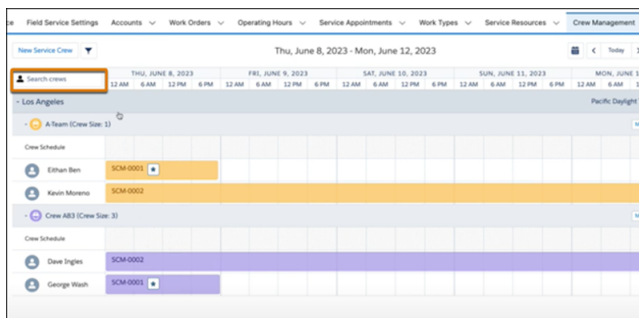
- Click a service resource's name in the sidebar to view their skills, service territory membership, and service crew membership. Click the card icon to the right of their name to view the service resource record.
- Select a scheduling policy using the Policy dropdown menu.
- Filter service resources 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.



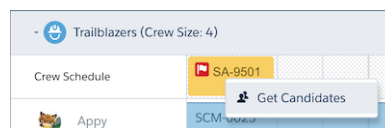
- To filter crews by skills, click the crew filter icon. Then, search for and select the required skills.



- Search for crews and crew members. You can search for multiple resources by separating the names with a comma. Each crew is marked with a different color on the Gantt.



- 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.



Crew Candidates for SA-15055 Close

Minimum Size: 3 (current assigned: 1)
Recommended Size: Undefined
Required Skills: Maintenance, Installation
Missing Skills: Installation

Members

Janice Gonzales
 Skills: Break-Fix, Field Connect (level 9), Field Upgrade (level 7), Maintenance (level 4)

Candidates

Alan Reed
 Relevant Skills: Installation
Has Missing Skills: Installation

Alexander Raneri
 Relevant Skills: Installation
Has Missing Skills: Installation

Jane Austin
 Relevant Skills: Installation
Has Missing Skills: Installation

Louise Martin
 Relevant Skills: Installation
Has Missing Skills: Installation

Ralph Clark
 Relevant Skills: Installation
Has Missing Skills: Installation

Available Resources (no relevant skills)

Gloria Barnes
 Resource has no relevant skills

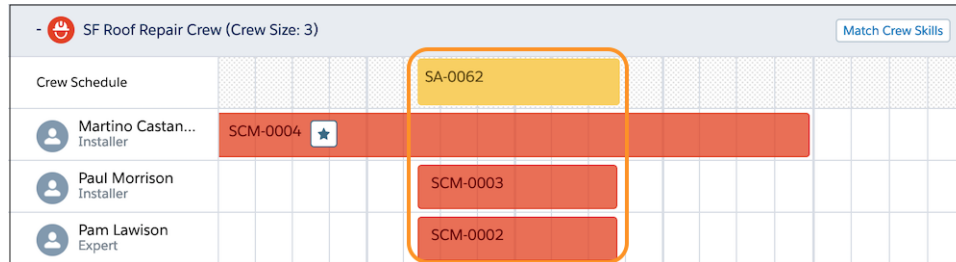
Harry Long
 Resource has no relevant skills

Matthew Parker
 Resource has no relevant skills

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.



Tip: When creating a service crew membership, align it with the resource’s start of day. We recommend using 00:00 because it aligns with Field Service’s default Start of Day. 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.

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.

SEE ALSO:

[Create Service Crews](#)

[Considerations for Scheduling Service Crews](#)

[View Service Crews on the Gantt](#)

[Service Crew Fields](#)

[Set Up Crew Management](#)

[Create Service Crews](#)

[Considerations for Scheduling Service Crews](#)

[View Service Crews on the Gantt](#)

[Set Up Crew Management](#)

Manage Field Service Appointments

Create, schedule, reschedule, and unschedule service appointments. Fix overlaps, group nearby appointments, and fill schedule gaps.

[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 Field Service Appointments](#)

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

[Reschedule Service Appointments in Field Service](#)

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

[Fix Field Service Scheduling Overlaps](#)

If a service appointment overlaps with other appointments or absences, use the Fix Overlaps feature in the Field Service dynamic Gantt to harmoniously reschedule appointments. The Fix Overlaps feature in the Gantt isn't available when using Enhanced Scheduling and Optimization.

[Group Nearby Field Service Appointments](#)

To minimize travel time or gaps between appointments in Field Service, 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. The Group Nearby Appointments feature isn't available when using Enhanced Scheduling and Optimization.

[Fill Schedule Gaps in Field Service](#)

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. The Fill-In Schedule feature isn't available when using Enhanced Scheduling and Optimization.

[Customize Field Service Appointment Chatter Settings](#)

In Field Service, control whether custom Gantt Chatter posts, dispatch posts, and emergency posts are shared on service appointments or on service appointment parent records.

[Dispatch Field 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.

SEE ALSO:

[Service Appointment Fields for Field Service](#)

[Customize Appointment Booking Settings](#)

[Customize the Field Service Appointment Life Cycle](#)

[Customize Appointment Booking Settings](#)

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](#).

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 service appointments:

- Create on service appointments

To create assigned resources:

- Edit on service appointments AND Read on service resources

To update or delete assigned resources:

- Edit on 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.

SEE ALSO:

[Service Appointment Fields for Field Service](#)

[Schedule Service Appointments for Field Service](#)

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.

SEE ALSO:

[Service Appointment Fields for Field Service](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

[Schedule Appointments from the Record Feed](#)

In Field Service, 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 a Field Service appointment in a hurry with Auto Schedule—right from the appointment itself. Auto Schedule finds the best available slot based on your scheduling policy.

[Complex Work in Field Service](#)

To stay on top of complex projects and multistage work, create scheduling dependencies between related service appointments. Scheduling dependencies help you account for situations when technicians need to perform related service appointments in a certain order. For example, ensure that a particular appointment can't start until a related appointment is complete or that two appointments must start at the same time.

[Schedule Appointments Using Priorities](#)

Schedule critical Field 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.

[Schedule Emergency Appointments](#)

In Field Service, 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 Without Travel](#)

Optimize your mobile workers' schedules for increased productivity by marking service appointments as offsite when jobs can be done remotely, even if an address is specified. No travel time is added to the schedule. For example, remote technical assistance, filling out reports, or renewing health and safety certifications can be done from anywhere. Enhanced Scheduling and Optimization must be enabled.

[Update a Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

SEE ALSO:

[Create Service Appointments for Field Service](#)

[Unschedule Field Service Appointments](#)

[Reschedule Service Appointments in Field Service](#)

[Customize Appointment Booking Settings](#)

[Unschedule Field Service Appointments](#)



[Reschedule Service Appointments in Field Service](#)

Schedule Appointments from the Record Feed

In Field Service, 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](#).

Action	Used By	Options Provided
Book Appointment	<p>Support agents or customers. For example:</p> <ul style="list-style-type: none"> 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 <p> 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.</p>	<p>Arrival windows, which are based on the default operating hours selected in your appointment booking settings.</p> <p> 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.</p>
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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To schedule an appointment using the Book Appointment or Candidates action: One of these custom permission sets:

- Field Service Admin Permissions
- Field Service Agent Permissions
- Field Service Dispatcher Permissions

To view the Change Scheduling Policy field on the Book Appointment action:

- Policy Picker In Appointment Booking custom permission
- AND
- Read permission on the Scheduling Policy object

To view the Change Scheduling Policy field on the Candidates action:

- Policy Picker In Get Candidates custom permission
- AND
- Read permission on the Scheduling Policy object

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.
 - Adding global actions into flows using Lightning Web Components isn't supported.
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

00004522

Post **Book Appointm...** Candidates Emergency New Task Log a Call New Note New Event

Back 00004522

Change Scheduling Policy: In-day Customer First (Default)

SHOW	GOLDEN	8 FEB,	9 FEB,	10 FEB,	11 FEB,	12 FEB,	13 FEB,	14 FEB,	15 FEB,
ALL	SLOTS	FRI	SAT	SUN	MON	TUE	WED	THU	FRI

Golden Slots

- Friday, February 8th 2019
09:00 - 11:00 Ideal
- Friday, February 8th 2019
11:00 - 13:00 Ideal
- Friday, February 8th 2019
13:00 - 15:00 Ideal

Friday, February 8th 2019

- 09:00 - 11:00 Ideal
- 11:00 - 13:00 Ideal
- 13:00 - 15:00 Ideal
- 15:00 - 17:00 Ideal

Candidates Window

00004522

Post Book Appointment **Candidates** Emergency New Task Log a Call More

Back Schedule 00004522

Change Scheduling Policy: In-day Customer First (Default)

Current Schedule
Scheduled for Sean Richards on Fri, Feb 8, 2019 9:00 AM

Sean Richards ★
1 Options, Starting Fri, Feb 8, 2019 9:00 AM

Name	Gantt Label	Technician Ph...
Sean Richards	-	-

Fri, Feb 8, 2019 9:00 AM **100/100**

Naomi Morgan
1 Options, Starting Fri, Feb 8, 2019 9:00 AM

Name	Gantt Label	Technician Ph...
Naomi Morgan	-	-

Fri, Feb 8, 2019 9:00 AM **74/100**

Daniel Rogers
1 Options, Starting Fri, Feb 8, 2019 9:00 AM

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.
- Pinned service appointments can't be rescheduled using the Book Appointment, and Get Candidates scheduling actions.
- 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.
- Book Appointment ignores the arrival window defined on the service appointment so you can get different arrival window times. Get Candidates respects the arrival window on the service appointment if the scheduling policy includes a Match Time Rule for the arrival window fields (Scheduled Start and Scheduled End work rules).


SEE ALSO:

[Service Appointment Fields for Field Service](#)

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.*


 **Note:** You can schedule service appointments that are part of a dependency group using Enhanced Scheduling and Optimization with one of these options: from the dispatcher console map, from the mini view, or by using the mass schedule action. In such cases, the scheduling engine schedules the entire dependency group to the first available option it finds.

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.

 **Note:** You can also drag to reschedule a pinned service appointment.


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.

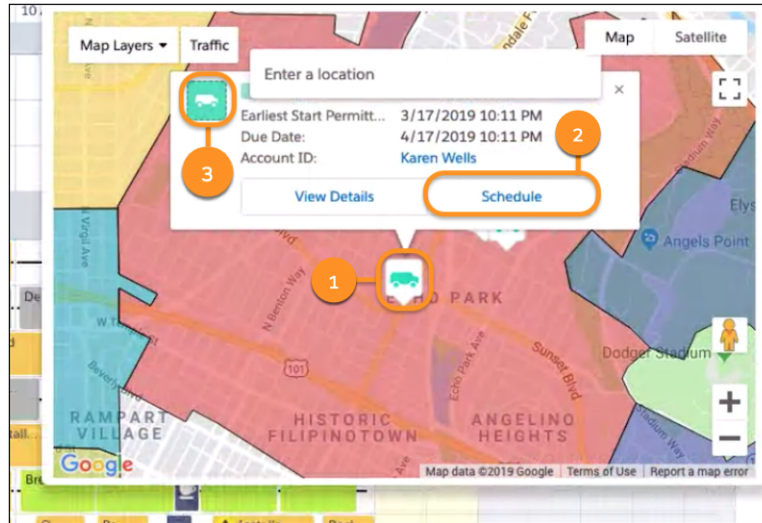
Schedule an Appointment from the Map

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 about rule violations applies.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



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.

SEE ALSO:

[Working in the Field Service Dispatcher Console Appointment List](#)

Schedule an Appointment Automatically

Schedule a Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To auto-schedule from a service appointment: One of these custom permission sets:

- FSL Admin Permissions
- FSL Agent Permissions
- FSL Dispatcher Permissions

Complex Work in Field Service

To stay on top of complex projects and multistage work, create scheduling dependencies between related service appointments. Scheduling dependencies help you account for situations when technicians need to perform related service appointments in a certain order. For example, ensure that a particular appointment can't start until a related appointment is complete or that two appointments must start at the same time.

 *This is a Field Service managed package feature.*

Watch the video to see how to use scheduling dependencies to stay on top of related service appointments.

 [Watch a video](#)

Get to know the common terms used in complex work.

Scheduling Dependency

Synonyms: Complex work, multistage work

Dependencies are the relationships between service appointments that must be followed in order to meet your business needs. Dependencies cover scenarios where appointments happen in a certain order or must be assigned to the same person. You can set up dependencies that ensure appointments happen at the same time, consecutively, or consecutively and immediately one after another.

Dependent appointments

Synonyms: Group or set of dependent appointments; chain of appointments

Throughout the documentation, dependent appointments refers to the related appointments defined in the Scheduling Dependencies section of a service appointment detail page. It includes the related appointments and the type of dependencies.

Dependency type

The logic that defines how two appointments are related. For example, Same Start appointments must begin at the same time. The dependency types are:

- Same Start—The appointments must start at the same time.
- Start After Finish—One appointment can't start until the other is complete. Optionally, assign both appointments to the same service resource.
- Start After Finish and Same Day—One appointment can't start until the other is complete. Schedule both appointments for the same day. Optionally, assign both appointments to the same service resource.
- Immediately Follow—Schedule the appointments back-to-back on the same day, and assign them to the same service resource.

[Set Up Complex Work](#)

Get ready to create scheduling dependencies, also known as complex, or multistage work. Update page layouts, activate dependency types, and turn on complex work for any service territories that aren't using Enhanced Scheduling and Optimization.

[Create Complex Work](#)

Model complicated realities with scheduling dependencies between appointments. Relate multiple service appointments so that scheduling and optimization can account for the dependencies. Each appointment's parent record must be a work order.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Considerations and Limitations for Complex Work

In Field Service, scheduling dependencies help you accurately model work that happens in stages, also called multistage work, and other sets of related appointments. Before you create service appointment dependencies, review the considerations and limitations.

SEE ALSO:

[Considerations for Multiday Scheduling](#)

[Considerations and Limitations for Complex Work](#)

Set Up Complex Work

Get ready to create scheduling dependencies, also known as complex, or multistage work. Update page layouts, activate dependency types, and turn on complex work for any service territories that aren't using Enhanced Scheduling and Optimization.

 This is a Field Service managed package feature.

1. To show complex work features, customize the service appointment page layout.
 - 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 show its properties. Set the height in pixels to `600`.
 - e. Ensure that these fields aren't on 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.
2. Activate the picklist values for dependency types.
 - a. From the object management settings for appointment dependencies, go to Fields & Relationships.
 - b. Select the Dependency field. Activate the dependency values that you want to be available for complex work. Dependency types are:
 - Same Start
 - Start After Finish
 - Start After Finish And Same Day
 - Immediately Follow
3. From the object management settings for service appointments, go to Field Sets and click **Complex Work Lookup Fields** to define the lookup fields available for selection when users create dependencies between appointments. By default, the available lookup fields are Account and Parent Object.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 page layouts:

- Customize Application

To edit Field Service settings:

- Field Service Admin permission set

4. Enable complex work for service territories that aren't using Enhanced Scheduling and Optimization. If complex work isn't enabled, you can create relationships between appointments, but scheduling operations aren't supported. This step isn't required for service territories using Enhanced Scheduling and Optimization.
 - 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 scheduling dependencies with three or more appointments.
5. Optionally, to control which fields are shown in the search results, modify the Service Appointments List Columns [field set](#).


Create Complex Work

Model complicated realities with scheduling dependencies between appointments. Relate multiple service appointments so that scheduling and optimization can account for the dependencies. Each appointment's parent record must be a work order.

 This is a Field Service managed package feature.

1. On a service appointment's detail page, find the Scheduling Dependencies section.
2. From the lookup filter, select an appointment that relates to the appointment that you're viewing. Service appointments with a status that falls within one of the status categories—Canceled, Complete, or Incomplete—aren't shown.
3. Select a dependency type:

Same Start	The appointments must start at the same time.
Start After Finish	The appointment in the First Appointment field can't start until the appointment in the Second Appointment field is complete.
Start After Finish and Same Day	The appointment in the First Appointment field can't start until the appointment in the Second Appointment field is complete. Schedule both appointments for the same day.
Immediately Follow	Schedule the appointments back-to-back on the same day, and assign them to the same service resource.

 **Note:** For dependency types Start After Finish and Start After Finish and Same Day, you can also add a Same Resource dependency.

4. Click **Create Dependency**.
5. To add another appointment to the dependency group, select two related appointments, one of which is in the dependency group. Select the dependency type and click **Create Dependency**. The service appointment is added to the dependency diagram and the list of appointments.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

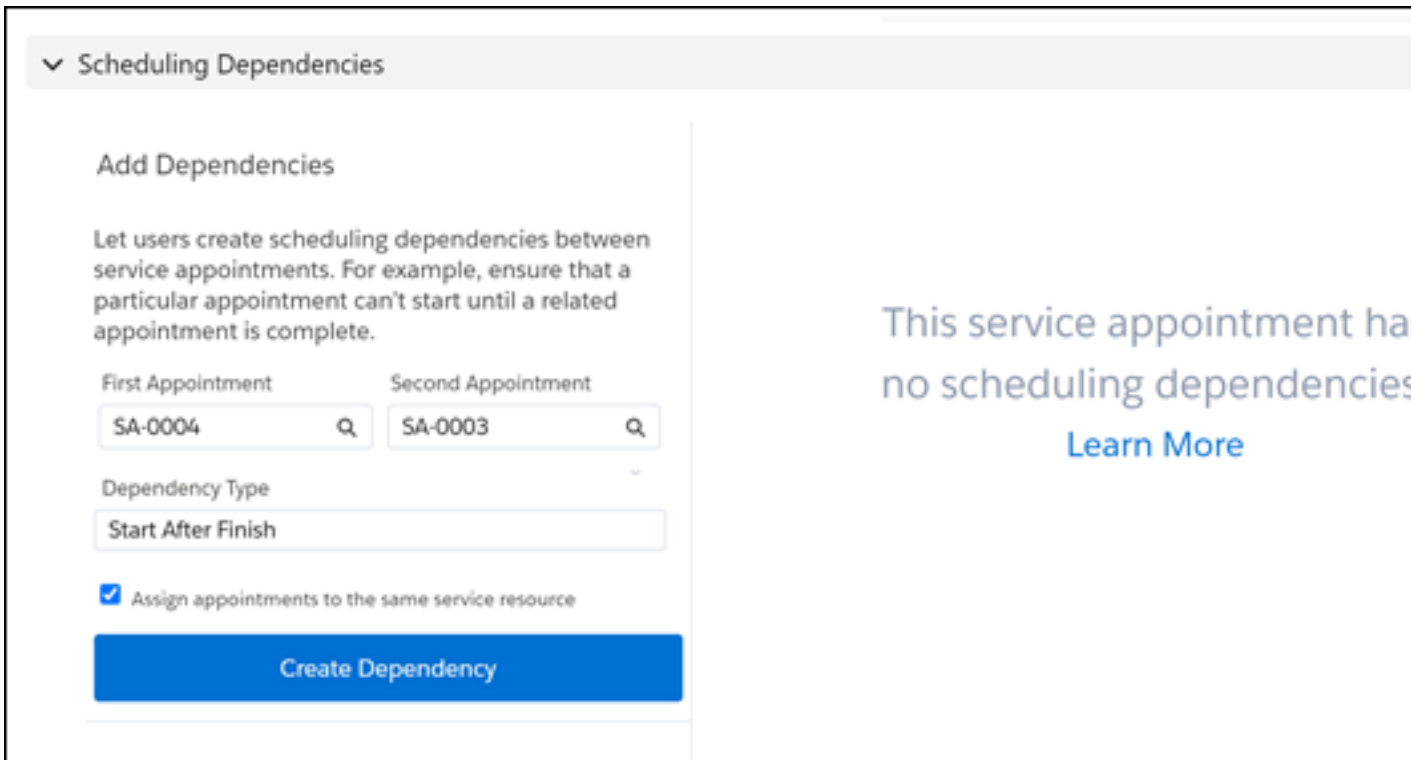
To create scheduling dependencies:

- Edit on service appointments

Example: Fix a Skylight

A customer reports 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-003), and one to repair the ceiling (SA-004). The skylight must be fixed before the ceiling is repaired, so the agent creates a Start After Finish dependency between SA-004 and SA-003. That way, scheduling processes can make sure the ceiling repair appointment starts after the skylight is repaired.

The agent wants the same person to do both assignments, so they select **Assign appointments to the same service resource**. After the agent adds the dependency, it's visible in a diagram and listed in the Scheduling Dependencies section.



Scheduling Dependencies

Add Dependencies

Let users create scheduling dependencies between service appointments. For example, ensure that a particular appointment can't start until a related appointment is complete.

First Appointment: SA-0004

Second Appointment: SA-0003

Dependency Type: Start After Finish

Assign appointments to the same service resource

Create Dependency

This service appointment has no scheduling dependencies

[Learn More](#)

But the technician can't fix the skylight alone. They need the right glass for the skylight. A second appointment, "Deliver skylight glass" (SA-005) must start at the same time as appointment SA-003 to fix the skylight. So the agent selects the two appointments and chooses the Same Start dependency type. After the agent adds the dependencies, all three appointments are visible in the diagram (1) and the two dependencies are listed in the Scheduling Dependencies section (2).

Add Dependencies

Let users create scheduling dependencies between service appointments. For example, ensure that a particular appointment can't start until a related appointment is complete.

First Appointment Second Appointment

Dependency Type

Assign appointments to the same service resource

- SA-0005
SA-0005 must start at the same time as SA-0003
- SA-0004
SA-0004 must start after SA-0003 (same service resource)

```
graph TD; subgraph Box1 [ ]; SA0005[SA-0005  
None]; SA0003[SA-0003  
None]; end; SA0003 -- "same service resource" --> SA0004[SA-0004  
None];
```

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.

Considerations and Limitations for Complex Work

In Field Service, scheduling dependencies help you accurately model work that happens in stages, also called multistage work, and other sets of related appointments. Before you create service appointment dependencies, review the considerations and limitations.

 *This is a Field Service managed package feature.*

When you set up appointments with scheduling dependencies, known as complex work, keep these considerations and limitations in mind.

General Considerations

- If a set of dependent appointments spans multiple service territories, you must select all territories in the optimization request for the appointments to be scheduled.
- To be considered for Same Resource dependencies when you're not using Enhanced Scheduling and Optimization, each service resource must have a single service territory membership. A chain of appointments in complex work can't span different service territory memberships.
- Pinned service appointments aren't counted in services sent in an optimization request or the number of scheduled services.
- To view a service appointment's related appointments from the Gantt, right-click the appointment and select **Show related**.

General Limitations

- Experience Builder site dispatchers can access this feature only when using Enhanced Scheduling and Optimization.
- You can't assign capacity-based resources to appointments that are part of an appointment dependency group. Dispatchers can manually drag service appointments to capacity-based resources, but scheduling and optimization don't schedule those appointments. You can manually schedule the appointments.
- The combination of multiday scheduling and complex work isn't supported. If a multiday service appointment is part of a scheduling dependency, its scheduled end date isn't calculated when the appointment is scheduled.

Complex Work for Service Territories Using Enhanced Scheduling and Optimization

- Scheduling and optimization processes use all-or-none logic to ensure that all appointments in a scheduling dependency are scheduled.
- If one service appointment in a complex work chain is pinned but unscheduled, for example, if it's canceled or waiting for parts, the entire chain can't be scheduled. Pinned and scheduled appointments within this chain remain scheduled.
- If you use the Same Resource dependency option, the assigned service resource must have a valid service territory membership in each territory where the work occurs.
- Service appointments can overlap on the Gantt in these cases.
 - If a dependent appointment is pinned, the scheduling logic looks for time on the Gantt to add the dependent appointments. Because the pinned appointment isn't flexible, it can cause overlaps, for example with travel times.
 - If a dependent appointment is pinned and overlapping with an appointment, break, or travel time, complex work doesn't try to schedule the other appointments in the dependency group. The overlap remains.
- Enhanced Scheduling and Optimization supports up to five service appointments in a dependency group. You can create a dependency group with more than five service appointments for dispatchers to manually schedule.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Complex Work for Service Territories Not Using Enhanced Scheduling and Optimization

- Service territories without Enhanced Scheduling and Optimization use all-or-none logic only when you select **Use all-or-none scheduling for related appointments**.
- To be considered for Same Resource dependencies, each service resource must have a single service territory membership. A set of dependent appointments can't span different service territory memberships.
- You can create dependencies between more than two appointments, except for consecutive work. However, when you schedule the appointments, dependencies are enforced for only two appointments at a time, even if you select **Use all-or-none scheduling for related appointments**.
- For dependencies that include more than two service appointments, scheduling and optimization don't guarantee that all the dependent appointments are scheduled. For example, in a set of four dependent appointments, the first two appointments can be scheduled but not the third or fourth.
- Scheduling operations (such as Get Candidates, Book Appointment, or the Schedule action) don't necessarily consider all dependencies in a set of appointments. If some appointments aren't scheduled it can result in rule violations.
- If an appointment in a dependency group with three or more appointments is scheduled, when optimization runs it considers those appointments as pinned. Optimization doesn't schedule, reschedule, or unschedule those appointments.
- Complex work uses point-to-point predictive routing in optimization and uses the most optimistic street-level routing (SLR) travel time in platform scheduling.

Consecutive Work Considerations and Limitations

You can create consecutive work with the Immediately Follow dependency type. Keep in mind these considerations and limitations.

- Service territories using Enhanced Scheduling and Optimization can use the Immediately Follow dependency type to connect up to five service appointments. In territories that don't use Enhanced Scheduling and Optimization, you can create Immediately Follow dependencies for only two service appointments. You receive an error after adding a third appointment with this dependency type.
- For service territories that don't use Enhanced Scheduling and Optimization, scheduling and optimization doesn't support predictive travel, crews, resource efficiencies, reshuffle actions, fixed gaps, or multiday work with consecutive work appointments.
- Breaks aren't supported, except for service territories that use Enhanced Scheduling and Optimization. In that case, scheduling can insert a lunch break between consecutive appointments.
- If you reschedule consecutive appointments for service territories that don't use Enhanced Scheduling and Optimization, 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 doesn't unschedule the first appointment. This limitation applies in service territories that don't use Enhanced Scheduling and Optimization. In territories that use Enhanced Scheduling and Optimization, scheduling is all-or-none, so all or none of the consecutive appointments are scheduled.
- When you schedule a service appointment with an Immediately Follow dependency for service territories that don't use Enhanced Scheduling and Optimization, the second service appointment's properties are ignored except for Duration, Location, Scheduled Start, and Scheduled End. Instead, optimization uses the properties of the first service appointment in the complex work chain.
- When you manually schedule (drag) a service appointment with an Immediately Follow dependency for service territories that don't use Enhanced Scheduling and Optimization, the second service appointment is automatically scheduled, such that the appointments are back-to-back. When you unschedule a service appointment with an Immediately Follow dependency, the second service appointment is automatically unscheduled. For service territories that use Enhanced Scheduling and Optimization, all complex work

is handled the same, regardless of the dependency type. When you manually schedule (drag) or unschedule a service appointment that is part of a complex work chain, it doesn't affect any of the other service appointments in the chain.

SEE ALSO:

[Complex Work in Field Service](#)

[Enable Multiday Field Service Appointments](#)

Schedule Appointments Using Priorities

Schedule critical Field 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 isn't 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.

Field Service supports only whole numbers such that decimal points are ignored when calculating priorities. For example, 3.94 is considered as 3. Any number above the priority range is considered as lowest priority.

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. If a service appointment in a lower priority is in a pinned status, other appointments aren't scheduled over this pinned appointment, and there's no overlap. Scheduling over a lower priority appointment isn't supported by Enhanced Scheduling and Optimization.

4. Schedule appointments and resolve any overlaps.

You can create a scheduling recipe to fix overlaps or use In-Day optimization.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


USER PERMISSIONS

To set up scheduling priorities and customize the service appointment page:

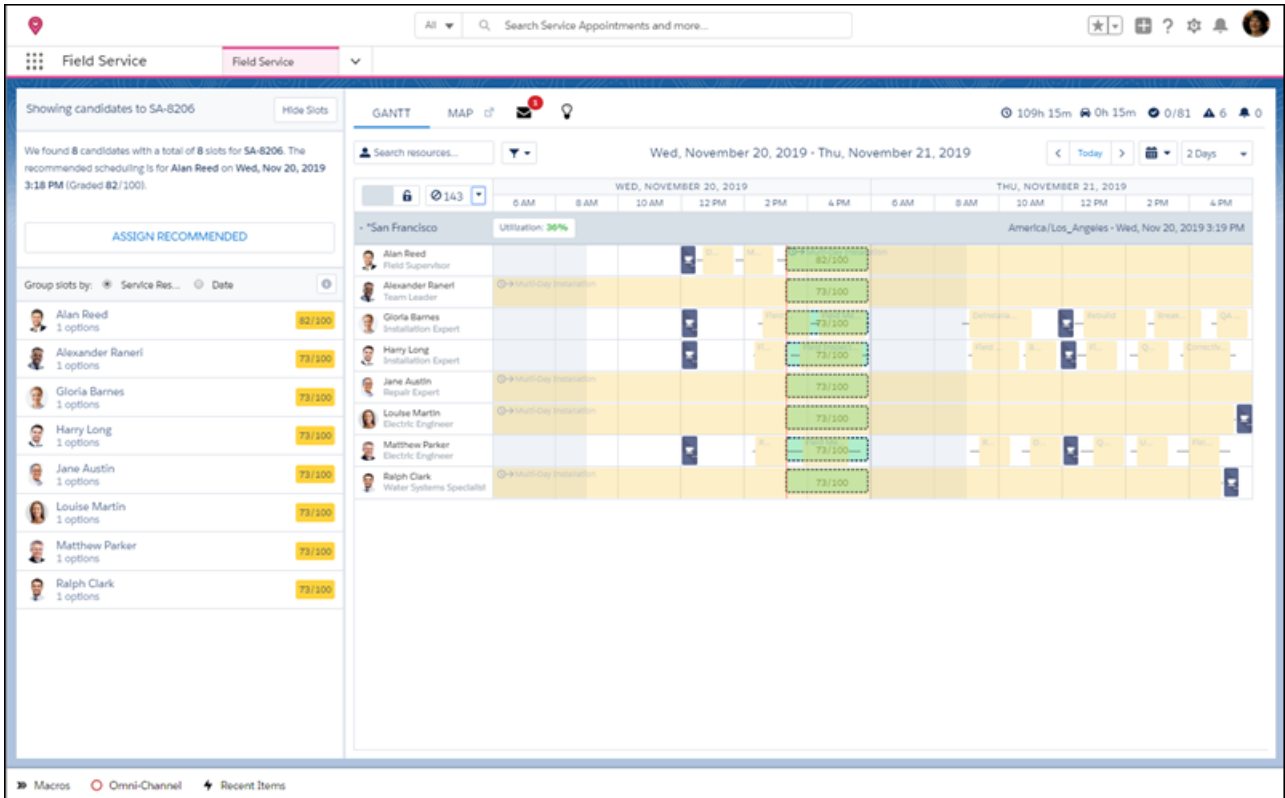
- FSL Admin custom permission set

To schedule from the dispatcher console: One of these custom permission sets:

- FSL Admin Permissions
- FSL Agent Permissions
- FSL Dispatcher Permissions

 **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.
- When you're using `Enhanced Scheduling and Optimization`, the engine's priorities are the opposite of how they're defined in the Salesforce platform, such that 100 is the highest priority and 1 is the lowest. When you send a scheduling request, the priorities are translated to match the enhanced engine. For example, priority 2 becomes priority 99, and priority 32 becomes priority 69. If a service appointment with priority 2 has a 30-minute travel time and you can schedule 2 appointments with priority 32 and a 5-minute travel time (assuming all service appointments have a duration of 15 minutes), the engine prefers the two low-priority appointments because their combined priority is higher. For an appointment to unschedule two or more tasks it must have a priority that is higher than the sum of all other task priorities. For example, one service appointment with priority 2 is equivalent to `Enhanced Scheduling and Optimization` priority 99, and two service appointments with priority 32 are equivalent to $69 + 69 = 138$. The engine sums the priority of the two service appointments, and because it's higher than the priority of the single high-priority service appointment, it schedules the two low-priority service appointments.

- When using scheduling over lower priority appointment, the lower priority service appointment is ignored, and the travel time during the schedule is calculated from the previous service appointment. For every change made to the schedule the travel time is recalculated for the higher priority appointment. The calculation can be done using the lower priority appointment instead of the previous appointment, which can cause an inconsistent travel time update for the higher priority appointment.

SEE ALSO:

[Optimize Field Service Appointments Using Priorities](#)


Schedule Emergency Appointments

In Field Service, 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

- 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.
- 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.
- If you're having trouble finding a candidate, select a different scheduling policy directly on the map or modify your emergency booking settings.
- 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.

 **Note:** Emergency Dispatch uses the service resource's Last Known Location to calculate the appointment's travel time as long as it is within the Last known location validity time frame. Travel time to the appointment is calculated using Real-Time Travel (provided by Google) and the schedule is based on this travel time. After you dispatch an appointment the ETA is updated according to the last service appointment location, or according to the resource's home base (if no appointments are scheduled on that day before the Emergency appointment). Travel time is calculated using the travel time calculation preferences set in the Routing section of Field Service Settings (aerial, SLR, predictive travel, or point-to-point predictive routing).

 **Tip:**

- 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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**.

Setting Name	Description
Emergency scheduling policy	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.
Last known location validity	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.
Ideal availability grade Good availability grade	The grading of candidates, which is color-coded. In the breadcrumbs example: <ul style="list-style-type: none"> Resources who can reach the appointment in less than 30 minutes are ideal candidates. Resource who can reach the appointment between 30 and 60 minutes are good candidates. Resources who can reach the appointment after 60 minutes are bad candidates.
Emergency search timeframe	The amount of time you have to resolve the emergency, not counting the appointment duration. The <i>Earliest Start Permitted</i> on the appointment is set to the current time, and the <i>Due Date</i> is the current time + appointment duration + Emergency Search Timeframe. 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.
Allow Chatter post	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.
Emergency Chatter Post Destination	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.
Pin After Dispatch	Pin the appointment after it is dispatched.

 **Note:** The Emergency Chatter action doesn't support multiday service appointments, bundled service appointments, or service appointments with a scheduling dependency.

SEE ALSO:

[Customize Field Service Appointment Chatter Settings](#)

[Service Appointment Fields for Field Service](#)


[Customize Field Service Appointment Chatter Settings](#)

Schedule Appointments Without Travel

Optimize your mobile workers' schedules for increased productivity by marking service appointments as offsite when jobs can be done remotely, even if an address is specified. No travel time is added to the schedule. For example, remote technical assistance, filling out reports, or renewing health and safety certifications can be done from anywhere. Enhanced Scheduling and Optimization must be enabled.

 *This is a Field Service managed package feature.*

1. In Setup, go to Field Service Settings and make sure that Field Service Enhanced Scheduling and Optimization is enabled.
2. To mark an appointment as offsite, select **Offsite Appointment** on the service appointment record. For orgs created in Spring '23 and earlier you must add the Offsite Appointment field to the Service Appointment page layout.

 **Note:** If the Service Resource Availability work rule is configured with Travel From Home or Travel To Home at the expense of work time, and the last appointment of the day is an offsite appointment, scheduling an appointment at any time of the day results in a resource availability rule violation. This rule violation occurs because the appointment's travel time is calculated after the offsite appointment.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

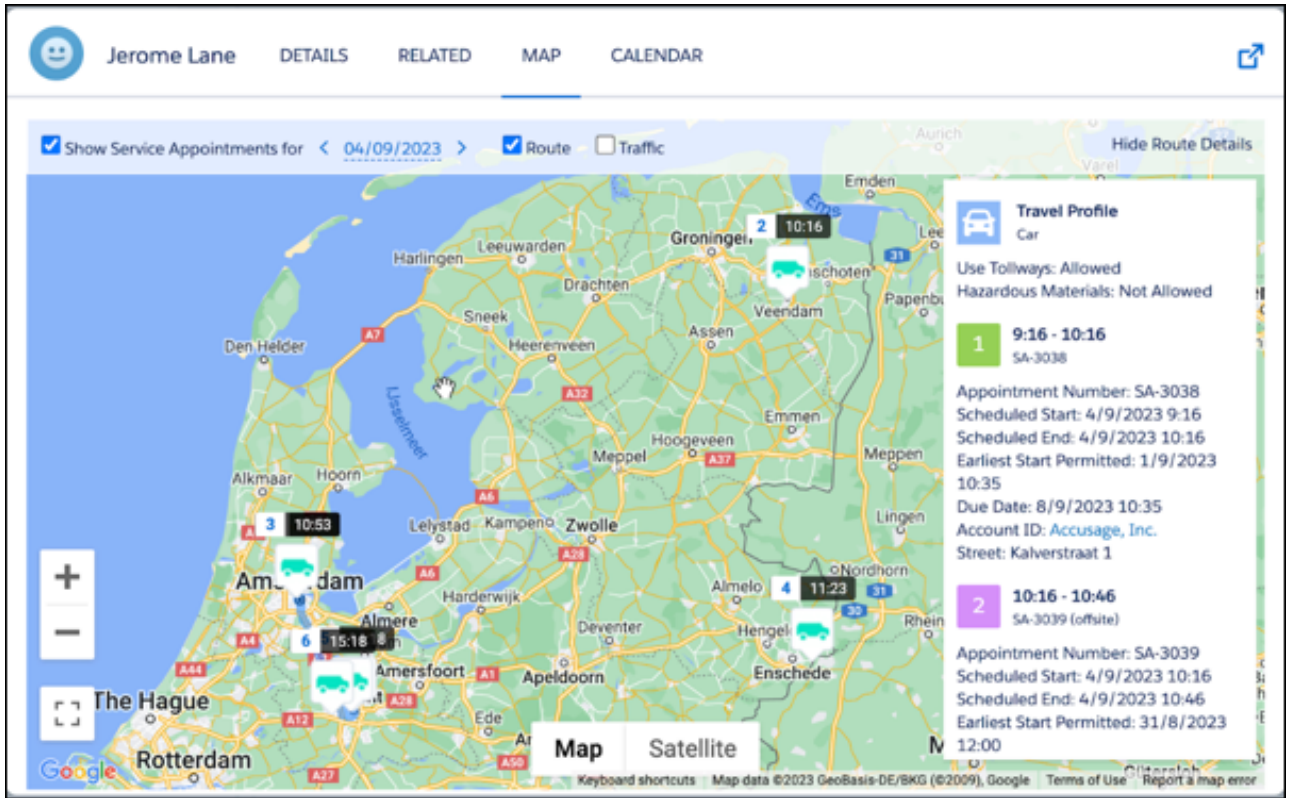
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To mark an appointment as an offsite appointment:

- Edit on service appointment
- AND
- Edit on the Offsite Appointment field

Example: Before you send out a technician to a remote location, you try to resolve the customer’s issue by remote troubleshooting. Mark the appointment as offsite before booking the appointment so that no travel time is calculated for that appointment.



The service resource map view shows the two appointments on the right side of the map marked as offsite, as no travel is calculated to and from these appointments.

Do you want the technician to perform administrative tasks at the end of the day? Before scheduling the appointment, mark the appointment as offsite.



To highlight the offsite appointments, consider using an icon by populating the Gantt Icon field on the appointment with a URL pointing to an image. If an offsite appointment is the last appointment of the day, travel to the homebase is calculated.

SEE ALSO:

[Service Appointment Fields for Field Service](#)

Update a Field Service 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**.

SEE ALSO:

[Service Appointment Fields for Field Service](#)

[Auto-Dispatch Service Resources](#)

Unschedule Field Service Appointments

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

 *This is a Field Service managed package feature.*

When a service appointment is unscheduled, it's removed from the Gantt and its assigned resources are removed. Status transitions are ignored when you delete an assigned resource or unschedule service appointments from the Gantt. You can unschedule an appointment in the following ways.

- Delete the service appointment.
- Delete the assigned resource record.
- From a service appointment details page, edit the Status field to the value shown for New Service Appointment in the managed package **Field Service Settings > Service Appointment > Service Appointment Life Cycle > SA Status**.

EDITIONS


Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- In the dispatcher console appointment list, select one or more appointments. In the mass actions menu, select **Unschedule**.
 - In the Gantt, right-click an appointment and select **Unschedule**. To select multiple appointments, hold down Control or Command while clicking appointments. Uncheduling 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**.
-  **Note:** Deleting the assigned resource record associated with a service appointment, or uncheduling 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**.

SEE ALSO:

[Schedule Service Appointments for Field Service](#)

[Schedule Service Appointments for Field Service](#)

[Fix Field Service Scheduling Overlaps](#)

Reschedule Service Appointments in Field Service

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. The Reshuffle feature isn't available when using Enhanced Scheduling and Optimization.

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 reshuffled, 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**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To reschedule an appointment: One of these custom permission sets:

- FSL Admin Permissions
- FSL Agent Permissions
- FSL Dispatcher Permissions

- 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).

SEE ALSO:

[Schedule Service Appointments for Field Service](#)

[Schedule Service Appointments for Field Service](#)

[Fix Field Service Scheduling Overlaps](#)

[Group Nearby Field Service Appointments](#)

[Fill Schedule Gaps in Field Service](#)

Fix Field Service Scheduling Overlaps

If a service appointment overlaps with other appointments or absences, use the Fix Overlaps feature in the Field Service dynamic Gantt to harmoniously reschedule appointments. The Fix Overlaps feature in the Gantt isn't available when using Enhanced Scheduling and Optimization.



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	Description
Automatically fix overlaps when an appointment overlaps with another appointment or absence	If this option is selected, overlaps are automatically fixed whenever an appointment overlaps with another appointment or an absence.
When attempting to fix overlaps	<ul style="list-style-type: none"> • 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.
After uncheduling services reschedule them by	Choose whether unscheduled appointments are rescheduled in order of priority or in the original schedule's order.
When unable to find a valid schedule for an appointment	<ul style="list-style-type: none"> • Leave on Gantt and set In-jeopardy: If an appointment can't be rescheduled without breaking work rules,

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Setting	Description
	<p>leave the appointment in its original time slot with an In Jeopardy flag.</p> <ul style="list-style-type: none"> • <code>Unschedule the appointment(s)</code>: If an appointment can't be rescheduled without breaking work rules, unschedule the appointment and remove it from the Gantt. • <code>Reshuffle other assignments</code>: 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 in Field Service. If the Fix Overlaps feature is in use, the <code>Reshuffle other assignments</code> 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.

 **Note:** Several fix overlaps features are available in Field Service.

- When you're scheduling service appointments on the Gantt, an appointment can overlap with another appointment or an absence. The [Fix Overlaps](#) feature in the managed package dynamic Gantt is used to reschedule overlapping appointments according to your configured settings. For example, when you can't find a valid schedule for an appointment, select to put the appointment in jeopardy, unschedule it, or reshuffle other assignments. This Fix Overlaps feature isn't supported by Enhanced Scheduling and Optimization.
- Don't confuse the dynamic Gantt Fix Overlaps option with the [Fix Overlaps](#) option in the scheduling policy. If Fix Overlaps is selected in the scheduling policy, service appointment overlaps are addressed during in-day or global optimization and overlaps with Resource Absences are ignored. When overlaps are being fixed, the overlapping appointments are unscheduled. If the optimization engine can't find a valid schedule for any appointments, these appointments remain unscheduled. If Fix Overlaps isn't selected, overlaps are left as is. When using Enhanced Scheduling and Optimization, overlaps are addressed regardless of the Fix Overlaps setting in the scheduling policy, such that this option isn't relevant.
- You can [create scheduling recipes](#) that address what happens to your schedule during resource schedule optimization due to appointment cancellations, time changes, and overlaps. Scheduling recipes aren't supported by Enhanced Scheduling and Optimization.
- The [Fix Schedule Overlaps flow \(Beta\)](#) replaces scheduling recipes when you're using Enhanced Scheduling and Optimization to resolve overlaps that occur when a mobile worker finishes an appointment late.

Considerations

- Fix Overlaps respects the original order of scheduled appointments. The earliest appointment remains the earliest and the last remains last.
- 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 considers only service appointments in the **Scheduled** or **Dispatched** `Status Category`, except for the service appointment that you move causing the overlap, which can have any status.

- Fix Overlaps doesn't run on past service appointments.
- Fix Overlaps isn't supported for capacity-based resources.
- When Fix Overlaps un-schedules and re-schedules service appointments from the Gantt, it ignores the settings in the service appointment lifecycle.
- When a service appointment is scheduled by Fix Overlaps, the appointment's `Schedule Mode` is set to **Automatic**.
- Automated Scheduling (scheduling recipes) gives an optimized solution for Fix Overlaps scenarios. It allows you to run Resource Schedule Optimization for the day of overlap and fill in new appointments when appointments finish sooner than planned.
- Fix Overlaps doesn't reschedule or un-schedule service appointments in pinned statuses (as configured for scheduling) or service appointments marked as pinned. If all of the overlapping service appointments have a pinned status, or their Pinned field is selected, then Fix Overlaps isn't triggered.

SEE ALSO:

[Unschedule Field Service Appointments](#)

[Optimize Your Field Service Schedule](#)

[Reschedule Service Appointments in Field Service](#)

Group Nearby Field Service Appointments

To minimize travel time or gaps between appointments in Field Service, use the Group Nearby Appointments action on a service appointment. This feature un-schedules appointments that were scheduled later that day and replaces them with appointments that are close in location to the source appointment. The Group Nearby Appointments feature isn't available when using Enhanced Scheduling and Optimization.



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.

Setting	Description
Service Appointment candidate Boolean field	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.
Work Order candidate Boolean field	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.
Work Order Line Item candidate Boolean field	Select any standard or custom checkbox field, including formula fields. If a service

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Setting	Description
	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.
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.
Max runtime (seconds)	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.
When attempting to schedule the unscheduled service after the nearby services	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 in Field Service.
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**.

SEE ALSO:

[Optimize Your Field Service Schedule](#)

[Reschedule Service Appointments in Field Service](#)

Fill Schedule Gaps in Field Service

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. The Fill-In Schedule feature isn't available when using Enhanced Scheduling and Optimization.



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.

Setting	Description
Service Appointment Candidate Boolean field	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.
Work Order Candidate Boolean field	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.
Work Order Line Item Candidate Boolean field	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.
Order candidate appointments by	<ul style="list-style-type: none"> • Priority: Sort candidates based on their priority field, which is set in Scheduling > General Logic. Distance is a secondary consideration.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Setting	Description
Max appointments to schedule	<ul style="list-style-type: none"> • 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. <p>When searching for nearby appointments, the scheduling engine ends its search after finding this many candidate appointments. The maximum is 50 appointments.</p>
Max runtime (seconds)	<p>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.</p>

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**.

SEE ALSO:

[Optimize Your Field Service Schedule](#)

[Reschedule Service Appointments in Field Service](#)

[View Field Service Resource Utilization](#)

Customize Field Service Appointment Chatter Settings

In Field Service, 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 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

 **Tip:** To turn on in-app notifications for mobile app and Lightning Experience users, see [Enable Field Service](#).

SEE ALSO:

- [Schedule Emergency Appointments](#)
- [Chatter in the Field Service Mobile App](#)
- [Schedule Emergency Appointments](#)
- [Chatter in the Field Service Mobile App](#)

Dispatch Field 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.

[Auto-Dispatch Service Resources](#)

Set up scheduled jobs that dispatch your resources auto-magically in Field Service.

[Drip Feed Field 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 in Field Service.

 *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. 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. This option isn't supported when dispatching a service appointment using an automated process user.
 - b. Select the Chatter feed where the mention should appear.
 - c. Edit the provided Auto Dispatch job, or create 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience


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

USER PERMISSIONS

To set up a job for dispatching: One of these custom permission sets:

- FSL Admin Permissions
- FSL Dispatcher Permissions

- 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.

SEE ALSO:

[Drip Feed Field Service Appointments](#)


[Customize the Field Service Appointment Life Cycle](#)

[Drip Feed Field Service Appointments](#)


[Update a Field Service Appointment's Status](#)

Drip Feed Field 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.

 **Note:** For drip feed dispatching, the service appointment can be in any status except for Completed, Cannot Complete, or Canceled. And, the status must allow the transition to the status set in Field Service Settings for the Service Appointment is sent to its resource setting.

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To set up drip feed dispatching: One of these custom permission sets:

- FSL Admin Permissions
- FSL Dispatcher Permissions

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.

SEE ALSO:

[Auto-Dispatch Service Resources](#)

[Auto-Dispatch Service Resources](#)

Manage Service Appointment Bundling in the Field Service Dispatcher Console

Service appointment bundling lets you collect multiple service appointments and define them as a single entity, called a bundle. Your admin can set up automatic bundling. You can also manage bundles manually according to the instructions in this section.

[Create a Field Service Bundle Manually](#)

Create a bundle manually in the Field Service Dispatcher Console.

[Schedule a Field Service Bundle](#)

From the Field Service Dispatcher Console, schedule the bundle service appointments, not the bundle member service appointments.

[Add Members to a Field Service Bundle](#)

Add bundle members to an existing bundle from the Field Service dispatcher console.

[Modify a Field Service Bundle](#)

You can get to the details of a bundle from the appointment list in the Field Service dispatcher console.

[Unbundle a Field Service Appointment Bundle](#)

When you unbundle a bundle, all the bundle member service appointments become regular service appointments and can then be scheduled individually.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience


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

Create a Field Service Bundle Manually

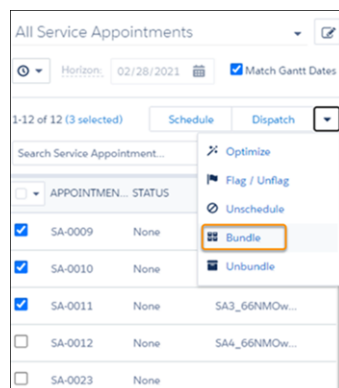
Create a bundle manually in the Field Service Dispatcher Console.

1. In the appointment list, select up to 200 service appointments that you want to bundle together. Make sure to select only service appointments that aren't already in a bundle.

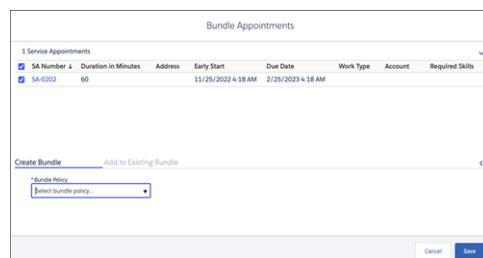
The service appointments must be on the same day, can't have any scheduling dependencies and can't be pinned. See [Appointment Bundling Limitations](#).

 **Tip:** To verify that you're selecting only service appointments that aren't in a bundle, apply the Exclude Bundle Members filter.

2. From the global actions list, select **Bundle**.





3. In the Bundle Appointments window, select **Create bundle** and select a bundle policy.



4. Save the bundle. The bundle is created only if all the service appointments comply with the configuration settings. If you receive an error for any service appointment, remove it or change its details and try again.
5. To make the bundle eligible for multiday scheduling, select **IsMultiday** in the bundle service appointment.

When a bundle is created:

- Appointment list—The new bundle service appointment appears in the appointment list.
 -  Indicates that the appointment is a bundle service appointment. When the bundle is scheduled, the icon also appears on the Gantt.
 -  Indicates that the appointment is a bundle member service appointment.
- Gantt—If all the service appointments in the bundle are scheduled, assigned to the same resource, and on the same day, the bundle is scheduled on the Gantt. If not, the bundle must be scheduled.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

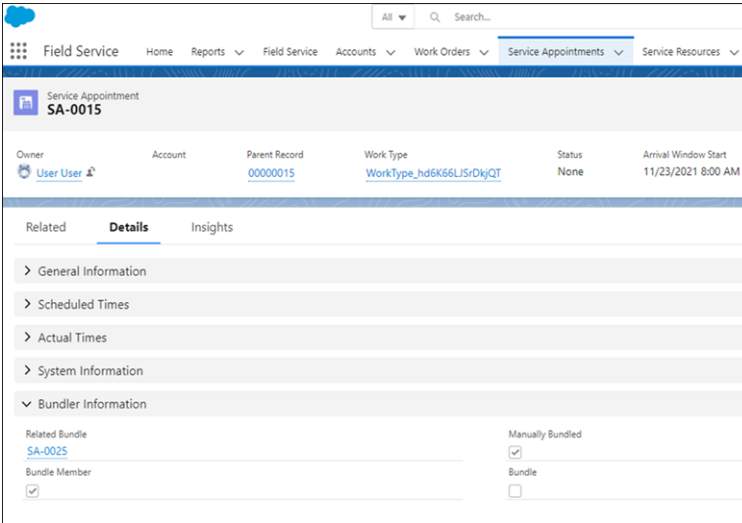
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To manage bundles:

- Field Service Dispatcher

- Bundle tab of the bundle service appointment's details window—If an Appointment Bundle Sort Policy is defined, the service appointments are sorted according to the policy. If an Appointment Bundle Sort Policy isn't defined, the service appointments are sorted according to their due date in ascending order.
- Service Appointments tab—Shows the bundle information related to each bundle service appointment and bundle member service appointment. This information can't be edited.



The Bundle Information fields can't be selected to display in a list view. See [Appointment Bundling Limitations](#)

Schedule a Field Service Bundle

From the Field Service Dispatcher Console, schedule the bundle service appointments, not the bundle member service appointments.

To schedule a bundle, drag the bundle service appointment onto the Gantt. You can't drag an individual bundle member service appointment onto the Gantt.

Use the Exclude Bundle Members filter to see only the bundle service appointments.

- **Tip:** You can create custom filters according to your organization's needs. For custom filters related to bundles, ask your Salesforce admin to add the Bundle and Bundle Member fields to the Field Sets.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To manage bundles:

- Field Service Dispatcher

Add Members to a Field Service Bundle

Add bundle members to an existing bundle from the Field Service dispatcher console.

1. In the appointment list or on the Gantt, select one or more service appointments that you want to add to a bundle.

The service appointments must be on the same day, can't have any scheduling dependencies, and can't be pinned. See [Appointment Bundling Limitations](#).

2. From the global actions list, select **Bundle**.
If a service appointment is already scheduled, adding it to a bundle unschedules it.
3. In the Bundle Appointments window, select **Add to existing bundle** and select a bundle.
If the selected bundle is pinned, you can't add bundle members to it.

SA Number	Duration in Minutes	Address	Early Start	Due Date	Work Type	Account	Required Skills
<input checked="" type="checkbox"/> SA-0053	360		8/29/2023 9:33 PM	9/28/2023 9:31 PM	WorkType E...	Salesforce	Fix
<input checked="" type="checkbox"/> SA-0055	360		8/29/2023 9:35 PM	9/28/2023 9:31 PM	WorkType ...	Salesforce	Check
<input checked="" type="checkbox"/> SA-0057	360		8/29/2023 9:37 PM	9/28/2023 9:31 PM	WorkType ...	Salesforce	Check
<input checked="" type="checkbox"/> SA-0063	360		8/29/2023 9:43 PM	9/28/2023 9:31 PM	WorkType ...	Salesforce	Maintenance
<input checked="" type="checkbox"/> SA-0065	360		8/29/2023 9:45 PM	9/28/2023 9:31 PM	WorkType E...	Salesforce	Destroy

SA Number	Duration in Minutes	Address	Early Start	Due Date	Work Type	Account	Required Skills
<input type="radio"/> SA-0101	360		8/29/2023 9:31 PM	9/28/2023 9:31 PM			Maintenance

4. Save the bundle.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To manage bundles:

- Field Service Dispatcher

Modify a Field Service Bundle

You can get to the details of a bundle from the appointment list in the Field Service dispatcher console.

1. From the appointment list, select a service appointment, and click **Edit**.
2. Open the **BUNDLE** tab.

If this service appointment is a bundle, the BUNDLE tab lists all the bundle member service appointments.

	ACTION	APPOINTMENT NUMBER	DURATION IN MINUTES	WORK TYPE	ACCOUNT	STREET	CITY	REQUIRED SKILLS
1	<input type="checkbox"/> Edit Remove	SA-0082	3.00	WorkType_wxTkUQuSPiOsBS				
2	<input type="checkbox"/> Edit Remove	SA-0083	3.00	WorkType_wxTkUQuSPiOsBS				
3	<input type="checkbox"/> Edit Remove	SA-0084	3.00	WorkType_wxTkUQuSPiOsBS				
4	<input type="checkbox"/> Edit Remove	SA-0085	3.00	WorkType_wxTkUQuSPiOsBS				
5	<input type="checkbox"/> Edit Remove	SA-0086	3.00	WorkType_wxTkUQuSPiOsBS				
6	<input type="checkbox"/> Edit Remove	SA-0087	3.00	WorkType_wxTkUQuSPiOsBS				

If this service appointment is a bundle member, the BUNDLE tab shows the details of the bundle service appointment and lists the additional bundle member service appointments.

	ACTION	APPOINTMENT NUMBER	DURATION IN MINUTES	WORK TYPE	ACCOUNT	STREET	CITY	REQUIRED SKILLS
1	<input type="checkbox"/> Edit Remove	SA-0003	120.00	WorkType_gDMTjS7FuphPq				
2	<input type="checkbox"/> Edit Remove	SA-0004	60.00	WorkType_gDMTjS7FuphPq				

3. To change the details, click **Edit**.

You can only schedule a bundle service appointment, not a bundle member service appointment. Therefore, in the SERVICE APPOINTMENT tab of a bundle member service appointment, you can't edit the start and end times or change the status to Scheduled.

4. To remove a bundle member, click **Remove**, or select multiple bundle members and click **Remove Members**.

If the bundle is pinned, you can't remove bundle members.

Bundle members in the Canceled status and bundle members with scheduling dependencies are automatically removed from the bundle. If you want the status of the removed bundle members to remain Canceled, in the Appointment Bundle Config, take both of these actions:

- Bundle Statuses to Propagate—If the list is empty, leave it empty. If statuses are already in the list, add the Canceled status.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To manage bundles:

- Field Service Dispatcher

- Bundle Member Statuses not to be Propagated—Add the Canceled status to the list.

SEE ALSO:

[Create an Appointment Bundle Config](#)

Unbundle a Field Service Appointment Bundle

When you unbundle a bundle, all the bundle member service appointments become regular service appointments and can then be scheduled individually.

1. In the appointment list or on the Gantt, select one or more bundle service appointments.
2. From the global actions, select **Unbundle**.

 **Note:** Pinned bundles can't be unbundled. To unbundle a pinned bundle, first unpin it.

Results of Unbundling a Bundle

When you unbundle a bundle, pay attention to the following behavior.

Results of Unbundling a Bundle

When you unbundle a bundle, pay attention to the following behavior.

- The bundle service appointment is deleted.
- The bundle members appear as individual service appointments in the appointment list.
- If the bundle is scheduled, the bundle members remain on the Gantt as individual service appointments.
- If the bundle is scheduled and an appointment bundle sort policy of type Sort Within a Bundle is defined, the service appointments are scheduled according to the policy. If a policy of this type isn't defined, the service appointments are scheduled according to their due date in ascending order.
- If the bundle is scheduled, and an appointment bundle aggregation duration downscale policy is defined, each service appointment in the bundle gets its slot on the Gantt according to the following formula: $(\text{original bundle member duration} \div \text{original total duration of all the bundle members}) \times \text{duration of the bundle after the downscale}$.

For example:

1. Three 60-minute service appointments were bundled.
2. According to the appointment aggregation duration downscale policy used in the bundle policy chosen when you bundled the appointments, the duration of the bundle members from the second bundle member was reduced by 10% to 54 minutes each. We now have a bundle with a duration of 168 minutes. The downscaled duration is visible only in the bundle's duration, not in the bundle members' duration.
3. The bundle was scheduled.
4. The bundle was unbundled.
5. The three service appointments remain on the Gantt at the scheduled time with 56 minutes each according to this calculation: $(60 \div 180) \times 168 = 56$.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To manage bundles:

- Field Service Dispatcher

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.

[Common Field Service Inventory Management Tasks](#)

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

[Track Required Inventory in Field Service](#)

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 in Field Service](#)

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 in Field Service](#)

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 in Field Service](#)

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

[Track Inventory Shipments in Field Service](#)

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 in Field Service](#)

Create *return orders* to facilitate the return and repair of items that were sold to customers or supplied to field service workers.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

SEE ALSO:

[Create Product Items to Represent Inventory](#)

[Set Up Your Field Service Inventory](#)

[Set Up Your Field Service Inventory](#)

Common Field Service 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.

I Want To...	How To Do It	Example
Track the quantity of a particular product stored at a particular location	Create a product item record associated with the product and the location, and specify the quantity stored there. Helpful links: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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.
Specify that a certain part is needed to complete a work order	Create a record in the Products Required related list on the work order. Helpful links: <ul style="list-style-type: none"> Track Required Inventory in Field Service 	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.
Request more parts from another inventory location when my stock gets low	Create a product request to indicate what's needed. Create a product request line item for each product requested. Helpful links:	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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

I Want To...	How To Do It	Example
	<ul style="list-style-type: none"> • Request Inventory in Field Service 	<p>one product request line item for the nails, and another for the hammers.</p>
Transfer parts between inventory locations	<ol style="list-style-type: none"> 1. Create a product transfer. Make sure to specify the quantity, source location, destination location, and source product item (which represents the stock that the items are being transferred from). 2. Create a shipment to track the transfer's shipping details. 3. Mark the product transfer received when the items arrive. <p>Helpful links:</p> <ul style="list-style-type: none"> • Transfer Inventory in Field Service • Guidelines for Transferring Inventory 	<p>To transfer 25 tires from Warehouse A to Warehouse B, create a product transfer with these settings:</p> <ul style="list-style-type: none"> • Source Location: Warehouse A • Source Product Item: Warehouse A Tires • Destination Location: Warehouse B • Quantity: 25 • Quantity Unit of Measure: Each <p>Create a shipment to track the shipping details for the tire transfer.</p> <p>Select Received on the product transfer when the tires arrive at Warehouse B.</p>
Transfer parts from an outside vendor to an inventory location	<ol style="list-style-type: none"> 1. Create a product request, listing the outside vendor as the account. 2. Create a product transfer. Make sure to specify the quantity, destination location, and product. 3. Create a shipment to track the transfer's shipping details. 4. Mark the product transfer received when the items arrive. <p>Helpful links:</p> <ul style="list-style-type: none"> • Request Inventory in Field Service • Transfer Inventory in Field Service • Guidelines for Transferring Inventory 	<p>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:</p> <ul style="list-style-type: none"> • Product: Safety Glasses • Destination Location: Service Van A • Quantity: 20 • Quantity Unit of Measure: Each <p>Because the items are coming from outside of your inventory, leave the Source Location and Source Product Item blank.</p> <p>Create a shipment to track the shipping details for the glasses transfer.</p> <p>Select Received on the product transfer when the glasses arrive at Service Van A.</p>
Indicate that parts from your inventory were consumed while completing a work order	<p>Create a product consumed record on the related work order.</p> <p>Helpful links:</p> <ul style="list-style-type: none"> • Track Inventory Consumption in Field Service • Guidelines for Consuming Inventory 	<p>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:</p> <ul style="list-style-type: none"> • Product Item: Service Van A Bolts • Quantity Consumed: 15 <p>The product item quantity is automatically reduced by 15 to reflect that the bolts are no longer in stock.</p>

I Want To...	How To Do It	Example
Track the return of a customer product	<p>Create a return order that lists the related case, order, or product.</p> <p>Helpful links:</p> <ul style="list-style-type: none"> • Track Customer Returns in Field Service • Guidelines for Tracking Customer Returns 	<p>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.</p> <p>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.</p>
Track the repair of a customer product	<ol style="list-style-type: none"> 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. <p>Helpful links:</p> <ul style="list-style-type: none"> • Track Customer Returns in Field Service • Guidelines for Tracking Customer Returns 	<p>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.</p> <p>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.</p>
Track the return of unused inventory from my stock back to the warehouse	<p>Create a return order that lists the unused inventory in the Product or Product Item field.</p> <p>Helpful links:</p> <ul style="list-style-type: none"> • Track Customer Returns in Field Service • Guidelines for Tracking Customer Returns 	<p>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.</p> <p>After the motor is returned to the warehouse, increase the quantity of the motor product item by 1.</p>

Track Required Inventory in Field Service

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**.

SEE ALSO:

[Create Work Types for Field Service](#)

[Product Item and Inventory Fields](#)

[Guidelines for Creating Work Types for Field Service](#)

[Add Required Skills to Work Orders or Work Types for Field Service](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 products required:

- Read on the parent object (work orders or work types) AND Read on products

To create, update, or delete products required on work orders or work order line items:

- Edit on work orders AND Read on products

To create, update, or delete products required on work types:

- Edit on work types AND Read on products

Request Inventory in Field Service

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 product requests:

- Create on product requests

To view product request line items:

- Read on product requests

To create, update, or delete product request line items:

- Edit on product requests

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.

SEE ALSO:


[Product Request and Transfer Fields](#)

[Set Up Product Requests in the Field Service Mobile App](#)

[Set Up Product Requests in the Field Service Mobile App](#)

Transfer Inventory in Field Service

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**, and **Status**. After you mark a product transfer received, you can't undo it.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 product transfers:

- Create on product transfers

To mark product transfers received:

- Edit on product items

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](#).

[Transfer Serialized Inventory](#)

Transfer serialized products to optimize inventory costs and ensure technicians have the right parts for their work.

[Inventory Transfers in the Mobile App](#)

With a few taps, mobile workers can update product transfers in the app. Before you can use product requests to transfer inventory, make sure that service resources can access and receive product transfers in the Field Service mobile app. Product transfers track the movement of inventory from one field service location to another.

[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.

SEE ALSO:

[Product Request and Transfer Fields](#)

Transfer Serialized Inventory

USER PERMISSIONS

To customize page layouts:	Customize Application
To view and create product transfers:	Read and create on product transfers
To create product transfers for products that support serial numbers:	
To send product transfers for products that support serial numbers:	Read on product items AND Read on serialized products
To receive product transfers for products that support serial numbers:	Read on product items AND Read on serialized products
To mark product transfers received:	Edit on product items

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Transfer serialized products to optimize inventory costs and ensure technicians have the right parts for their work.

- 1.** Create and send a product transfer.
 - a.** From the App Launcher, open **Product Transfers** and click **New**.
 - b.** Enter the **Product Name**, **Quantity Sent**, **Source Location**, and **Destination Location**.
 - c.** To select the **Source Product Item**, enter an exact or partial serial number. If you enter a partial number and press Enter, the Product Item Results page displays. Use the **Search** to enter an exact or partial serial number (SP-XX) or search by [Product Item Results Search](#). You can page through up to 50 results at a time. A maximum of 2,000 results are returned.
 - d.** Click **Save** and the product transfer is saved. You're prompted to add serialized products. If the product item is unavailable at the source location, no serialized products are displayed. To add serialized products to the product transfer later, click **Cancel**. To add serialized products later, on the Product Transfers page, select **Edit** on the product transfer that you want to update.

- e. Select the serialized products that you want to send in the product transfer.
 - f. To send the product transfer, click **Add**. When the product transfer is sent, a serialized product transaction with a transaction type of Sent is created for each serialized product to track its status change.
2. Receive the product transfer.
 - a. From the Product Transfer details page, click **Receive Transfer**.
 - b. If the item is a Receive Only Product, on the Receive Product Transfer page select the serialized products that you want to receive and click **Next**.
 - c. If the item is a Receive Only Product, on the Receive Product Transfer page, select the serialized products that you want to receive, and click Next.
 - d. Update the Quantity Received and select Received. A serialized product transaction with the applicable transaction type is created for each serialized product to track its status change.
 - e. Save your work.

Manage Serialized Inventory V2

With serialized products, you can create product transfers to track the movement of serialized inventory. You can create one product item record per item to record each item's serial number on the product item record, and then track the item's movement.

Manage Serialized Inventory V2

With serialized products, you can create product transfers to track the movement of serialized inventory. You can create one product item record per item to record each item's serial number on the product item record, and then track the item's movement.

Watch the video to see how to use serialized products to track transfers and products consumed.

 [Watch a video](#)

Transfer Serialized Products

The following is the process for transferring serialized products:

1. Create serialized inventory.

Create the product that is serialized and the serialized product. Create the product item with the product name and location. Add the serialized items for the products at the location.
2. Create and send the product transfer.

Create a product transfer and add the serialized products, quantity you want to send, as well as the source and destination. If the Transfer Record Mode on the product is set to Send and Receive, select the inventory that you want to send. When the product transfer is sent, a serialized product transaction with a transaction type of Sent is created for each serialized product to track its status change. A product transfer state is automatically created for each serialized product.
3. Receive a product transfer.

To receive the inventory from a product transfer, create a product transfer state. On the product transfer, update the Quantity Received and select Received. After the product transfer is received, a serialized product transaction with a transaction type of Received is created for each serialized product to track its status change. The product item of the transferred serialized product is updated from source location to destination location. The Quantity on Hand on the source product item and destination product item are updated accordingly. If there's an existing destination product item of the given product and location, no new product item is created, and

EDITIONS

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the Quantity on Hand is updated. If there's no existing destination product item, a new product item is created. For the source and destination product items, a product item transaction record is created. The record shows the quantity of items moved from the source to the destination.

Guidelines for Serialized Inventory V2

- Before you can send or receive serialized products in a product transfer, the serialized product with the serial number must exist as a serialized product.
- Only locations that use the Inventory Location option can be associated with product items.
- You can only mark a product transfer as received if the product transfer's Quantity Sent and Quantity Received are equal.
- You can only transfer multiple serialized products (together in one transfer) if they're all of the same product that is serialized. A product that is serialized is a product whose inventory consists of serialized products. A serialized product is the inventory that has an assigned serial number.
- You can manage serialized inventory V1 and V2 if both are turned on for your org. However, you can't combine V1 and V2 serialized inventory in the same product transfer or product consumed transaction.

Product Item Results Search

When adding a source product item to a product transfer, you can search for product items based on these fields:

- Name
- Product Code
- Description
- Stock Keeping Unit
- Make Name
- Model Name
- Vehicle Trim Level
- Version Name
- Harmonized System Code
- Harmonized Tariff Sched Code
- Manufacturer Name
- Manufacturer Part Number
- Product Line Code
- Product Category Code
- Universal Product Code

Common Terms

The following is a list of terms that apply to the transfer and consumption of serialized products:


- *Product* (object): a product that your organization sells.
- *Product Item* (object): the stock of a particular product at a particular location in field service, such as all bolts stored in your main warehouse.
- *Product Transfer State* (object): an action taken to associate a serialized product to a product transfer and indicate the action done to the serialized product. The new state as a result of the action.

- *Product Item Transaction* (object): an action taken on a product item in field service. Product item transactions are auto-generated records that help you track when a product item is replenished, consumed, or adjusted.
- *Serialized Product* (object): a product that is serialized. Each serialized product has a serial number.
- *Serialized Product Transaction* (object): an action taken on a serialized product. Serialized product transactions are auto-generated records that help you track the status change for a serialized product.
- *Product Consumed* (object): an item from your inventory that was used to complete a work order or work order line item in field service.
- *Product Consumed State* (object): the new state of the serialized product after it's consumed.

Serialized Product Status

When the serialized product status is updated, a serialized product transaction is created. The following table shows the valid serialized product status changes, and the serialized product transaction type for the corresponding serialized product transaction record.

Original Serialized Products Status	New Serialized Products Status	Serialized Product Transaction Type
Available or NULL	Consumed	Consumed
Available or NULL	Damaged	Damaged
Available or NULL	Lost	Lost
Available or NULL	Available	Received
Available or NULL	Sent	Sent
Damaged	Lost	Lost
Damaged	Available	Repaired
Damaged	Sent	Sent
Lost	Available	Found
Sent	Lost	Lost
Sent	Available	Received
Sent	Damaged	Received
N/A	All valid non-null status	Replenished

 **Note:** When a product transfer is marked as Sent, the status of the serialized product is always updated to Sent, even if the transfer contains a damaged item. If necessary, you can manually mark an item as Damaged without a product transfer.

Inventory Transfers in the Mobile App

With a few taps, mobile workers can update product transfers in the app. Before you can use product requests to transfer inventory, make sure that service resources can access and receive product transfers in the Field Service mobile app. Product transfers track the movement of inventory from one field service location to another.

User Permissions Needed


To customize page layouts:	Customize Application
To view and create product transfers:	Read and create on product transfers
To create product transfers for products that support serial numbers:	
To send product transfers for products that support serial numbers:	Read on product items AND Read on serialized products
To receive product transfers for products that support serial numbers:	Read on product items AND Read on serialized products
To mark product transfers received:	Edit on product items

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Check that Salesforce is configured to use product transfers in the mobile app. Then get started receiving product transfers so that you can track inventory.

 **Note:** To show product transfers in the mobile app, edit the Location page layouts assigned to mobile users. Add the Product Transfers Destination related list. After you add the related list, product transfers are shown in the Inventory tab in the mobile app. Make sure that users have permission to view product transfers.

Product transfers are shown only if the destination location of the product transfer is the location linked to the service resource. Child locations, for example multiple locations, are not supported.

1. In the mobile app, go to Inventory and locate the Product Transfers section. If you don't see product transfers, check the page layouts assigned to mobile users.
2. For each product transfer that you want to update, tap **Scan** or **Receive**.
3. Select the quantity of products received, and save your changes.

After you save the changes, received product transfers appear in the Received Product Transfers section of the Product Transfers page. This action can't be undone.

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](#).

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.

EDITIONS

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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.

SEE ALSO:

[Track Inventory Shipments in Field Service](#)


[Product Request and Transfer Fields](#)

Track Inventory Consumption in Field Service


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.

[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.

[Consume Serialized Inventory](#)

When an item is used during a field service appointment, create a product consumed record to adjust your inventory numbers accordingly. You can add products consumed to work orders or work order line items. You can also track product consumption at the line item level to know which products were used for each line item's tasks.

SEE ALSO:

[Product Item and Inventory Fields](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 products consumed:

- Read on work orders

To create or delete products consumed:

- Edit on work orders AND Read on product items

To update products consumed:

- Edit on work orders

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.

SEE ALSO:

[Product Item and Inventory Fields](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Consume Serialized Inventory

When an item is used during a field service appointment, create a product consumed record to adjust your inventory numbers accordingly. You can add products consumed to work orders or work order line items. You can also track product consumption at the line item level to know which products were used for each line item's tasks.

User Permissions Needed

To view products consumed:	Read on work orders
To create or delete products consumed:	Edit on work orders AND Read on product items
To create products consumed for products that support serial numbers:	Create on products consumed
To update products consumed:	Edit on work orders
To consume products for products that support serial numbers:	Edit on work orders AND Read on product items AND Read on serialized products

EDITIONS

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Use your organization's best practices to define a process for associating an asset with the consumed serialized product.

1. Create a product consumed.
 - a. Open the work order.
 - b. On the Related tab, go to Products Consumed and click **New**.
 - c. If applicable, enter a work order line item. The work order is auto-populated.
 - d. Select the serialized **Product Item**.
 - e. Enter *0.00* for the **Quantity Consumed**.
 - f. Add context in the **Description** field.
 - g. Click **Save**.
2. Set the product consumed state.
 - a. Go to the work order's **Related** list.
 - b. Select the product consumed.
 - c. Go to the product consumed **Related** list.
 - d. On Product Consumed State, select **New**.
 - e. Use the lookup field to select a **Serialized Product**.
 - f. For the **Consumed State**, select Consumed or Withdrawn indicates that the product was previously dispatched but taken out of circulation for repair.
 - g. Click **Save**.
 - h. Repeat the steps for all serialized products included in the product consumed.
3. Consume the product.
 - a. Edit the **Product Consumed**.
 - b. Select **Consumed**.

- c. Enter the **Quantity Consumed**.
- d. Click **Save**.

Track Inventory Shipments in Field Service

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.

SEE ALSO:

[Product Request and Transfer Fields](#)
[Guidelines for Transferring Inventory](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 shipments:

- Create on shipments

Track Customer Returns in Field Service

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 or 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.

[Guidelines for Tracking Customer Returns](#)

Learn about common return scenarios and how to log them in Field Service. Use return orders to track customer returns, customer repairs, or inventory returning from a mobile worker's van stock to a warehouse or supplier.

SEE ALSO:

[Return Order Fields](#)

[Return Order Fields](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 return orders:

- Create on return orders

To view return order line items:

- Read on return orders

To create, update, or delete return order line items:

- Edit on return orders

Guidelines for Tracking Customer Returns

Learn about common return scenarios and how to log them in Field Service. Use return orders to track customer returns, customer repairs, or inventory returning from a mobile worker's van stock to a warehouse or supplier.

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, 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:

EDITIONS

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- 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.

 **Note:** While you can track the return of products to your inventory using only a product transfer, return orders let you add information about why the product is being returned.

SEE ALSO:

- [Return Order Fields](#)
- [Report on Field Service](#)
- [Return Order Fields](#)

Record Product Warranties in Field Service

Use Warranty Terms to record details of the labor, parts, expenses, and exchange options that you provide to rectify issues with products you sell or install.

To create a standard warranty, assign warranty terms to a product or product family. Then, when you sell or install a product, record details of additional or extended warranties along with exclusions and void terms.

Setting up warranty information involves these steps:

- Create warranty terms.
- Assign warranty terms to a product or product family.
- Create an asset and (if your admin hasn't set up automation) add the standard warranty terms for the product.
- Enter additional or extended warranty terms for the asset.

Create Warranty Terms

1. Navigate to Warranty Terms, and click **New**.
2. Enter the details of the warranty term.
3. Save the record.

Assign Warranty Terms to a Product

1. Navigate to the Product, and from the Warranty Terms related list, click **New**.
2. Search for a warranty term.
3. Choose whether this warranty term applies to the product or product family.
4. Save the record.

Enter Additional or Extended Warranty Terms for an Asset

When an asset is created, it picks up the standard warranty terms for the product. You can then modify these terms or add new ones.

1. Navigate to the Asset, and from the Asset Warranties related list, click **New**.
2. Search for a warranty term or enter details of the warranty term.
3. Save the record.

SEE ALSO:

- [Organize Products with Product Families](#)
- [Set Up for Product Warranties in Field Service](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Manage Product Service Campaigns in Field Service

Track and manage a product recall, manual firmware upgrade, safety or compliance audit, end-of-life communication, or similar product update.

Managing a product service campaign involves these steps.


- Create a product service campaign.
- Identify the assets affected and creating a product service campaign item for each asset. For product service campaigns with several tasks to complete, consider creating a work type.
- Create work orders and work order line items, return orders and return old line items, or a combination of both to complete the campaign tasks.

Create a Product Service Campaign

- Navigate to Product Service Campaign and click **New**.
- Enter the details of the product service campaign.
- Save the record.

Add Product Service Campaign Items

- Navigate to the Product Service Campaign, and from the Product Service Campaign Items related list and click **New**.
- Enter the details of the product service campaign item.
- Save the record.

 **Note:** Where there are many assets for the product subject to the product service campaign, create the product service campaign items using Data Loader.

Add Work Orders and Return Orders

- Navigate to either Product Service Campaign or Product Service Campaign Items, and from the Work Orders and Return Orders or Work Order Line Items and Return Order Line Items related list, click **New**.
- Enter the details of the work order and return order or work order line items and return order line items.
- Save the record.

SEE ALSO:

[Set Up Product Service Campaigns in Field Service](#)

[Set Up Product Service Campaigns in Field Service](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Track Availability and Reliability in Field Service

Obtain availability and reliability statistics to measure asset performance, efficiency, and depreciation.

1. On the asset, enter the Average Uptime Per Day, Uptime Record Start Date, and Uptime Record

Availability	Cumulative Downtime
90.01%	72.00
Reliability	Cumulative Unplanned Downtime
93.34%	48.00
Average Uptime Per Day	Uptime Record End Date
24.00	
	Uptime Record Start Date
	2/3/2020, 8:00 AM

End Date.

Average Uptime Per Day records the number of hours the asset is expected to be available on average every day. For example, the public elevators in a retail store that is open from 8 AM to 8 PM Monday through Saturday. The Average Uptime Per Day is calculated as 12 hours for 6 days divided by 7 days in the week, for 10.28 hours.

EDITIONS


Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

2. Use the Asset Downtime Periods related list to [Record Asset Downtime in Field Service](#) on page 419.

 **Note:** After updating Asset Downtime Periods, reload the Asset record to see the updated cumulative downtime, cumulative unplanned downtime, availability, and reliability.

About the calculations:


 **Note:** Availability and reliability are calculated when an uptime record start date is provided. When no uptime record start date is provided we don't calculate availability or reliability, and both fields are blank.

Availability and reliability values are calculated as the ratio between expected uptime and actual uptime allowing for:

- planned and unplanned downtime (in calculating availability), that is $Availability = (expected\ uptime - accumulated\ planned\ and\ unplanned\ downtime) / expected\ uptime$
- unplanned downtime (in calculating reliability), that is $Reliability = (expected\ uptime - accumulated\ unplanned\ downtime) / expected\ uptime$

Average Time to Repair and Average Time Between Failures are calculated as follows:


- $Average\ Time\ Between\ Failures = (Uptime\ in\ days - unplanned\ downtime\ in\ days) * Average\ uptime\ per\ day / number\ of\ unplanned\ downtime\ count$
- $Average\ Time\ to\ Repair = Unplanned\ downtime\ in\ hours / number\ of\ unplanned\ downtime\ count$

 **Note:** Average Time to Repair and Average Time Between Failures are calculated only when Uptime Record Start Date and Unplanned Downtime Count information are provided. The "unplanned downtime count" is calculated on the asset and based on the number of "AssetDowntimePeriod" records that are categorized as "Unplanned". To calculate Average Time Between Failures, the Uptime Record End Date must be provided as well.


Expected uptime is calculated as follows:


- If the uptime record end time is in the future or no uptime record end time is provided
 - $Uptime = the\ average\ uptime\ per\ day * number\ of\ days\ between\ the\ uptime\ record\ start\ time\ and\ now.$
- Else
 - $Uptime = the\ average\ uptime\ per\ day * number\ of\ days\ between\ the\ uptime\ record\ start\ time\ and\ uptime\ record\ end\ time.$

Planned and unplanned downtime are accumulated as follows:

- If the uptime record start time or uptime record end time change, the accumulated downtimes are recalculated based on the uptime record start time and uptime record end time. If there's no uptime record end time, all records after the uptime record start time are accumulated, including records dated in the future.
 - When a downtime record is added, updated, or deleted, the accumulated downtime is updated if the record's downtime start or end date falls between the uptime record start time and uptime record end time. If there is no uptime record end time, all records after the uptime record start time are accumulated, including records dated in the future.
-  **Note:** If you record details of planned downtime, we recommended that you maintain the uptime record end time as a date close to now. This ensures that the availability and reliability calculations exclude planned downtime information. If the uptime record end time isn't set, and the accumulated planned downtime exceeds the accumulated uptime to date, the reliability and availability statistics may be reported as negative.

The read only Outside Uptime Calculation Period checkbox indicates whether a record is excluded from the cumulative downtime calculation.

Information	
Asset Elevator	Downtime Type Planned
Start Date 7/13/2020, 10:00 AM	End Date 7/13/2020, 11:30 AM
Outside Uptime Calculation Period 	Description Replacement of broken floor tile.

-  **Note:** When reporting on asset downtime records, you can't filter records using the Outside Uptime Calculation Period flag nor can you include the flag in the report

[Record Asset Downtime in Field Service](#)

Use the Asset Downtime Periods related list to record details of planned and unplanned downtime.

SEE ALSO:

- [Set Up Field Service Asset Availability and Reliability Reporting](#)
- [Provide Access to Asset Availability and Reliability Information in Field Service](#)

Record Asset Downtime in Field Service

Use the Asset Downtime Periods related list to record details of planned and unplanned downtime.

1. Open the asset record and the Related tab.
2. Next to Asset Downtime Periods, click **New**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

3.


The screenshot shows a form titled "New Asset Downtime Period". Under the "Information" section, there are several fields:

- * Asset:** A dropdown menu showing "Elevator".
- * Downtime Type:** A dropdown menu showing "Planned".
- * Start Date:** Two input fields for "Date" (7/13/2020) and "Time" (10:00 AM).
- * End Date:** Two input fields for "Date" (7/13/2020) and "Time" (11:30 AM).
- Description:** A text area containing "Replacement of broken floor tile.".

 At the bottom right of the form, there are three buttons: "Cancel", "Save & New", and "Save".

In Downtime Type, select Planned or Unplanned.

4. Enter the date and time for the start and end of the downtime.
5. Enter a description of the reason for the downtime.
6. Save your changes.

 **Note:** Enter details for downtime that occurs during the hours when the asset is expected to be available. For example, a public elevator in a retail store is expected to be available from 8 AM to 8 PM. In this example:

- Planned maintenance performed between 9 PM and 10 PM isn't recorded as downtime.
- Unplanned maintenance performed between 7 AM and 9 AM is recorded as unplanned downtime from 8 AM to 9 AM.
- Unplanned maintenance performed between 1 PM and 11 AM the following day is recorded as two down time records:
 - Unplanned downtime from 1 PM to 8 PM on the first day.
 - Unplanned downtime from 8 AM to 11 AM on the second day.


If downtime outside the expected uptime is recorded, the reliability and availability figures are understated. In extreme cases, they can be reported as negative.

 **Note:** When an asset is shared, its asset downtime period records are also shared.

Manage Field Service Reports

Create service reports for work orders, work order line items, or service appointments and email them directly to customers. Use standard templates, or create variations of your own.

You can use either Service Reports or Document Builder to create service documents, but only one of these features can be enabled and in use at a time. If you enable Document Builder, the Service Report button is hidden for users. You can continue to use Service Reports, but we suggest adopting Document Builder to get the most out of your service document experience.

 **Note:** Service report PDFs don't support right-to-left text layout. For more information, see [Right-to-Left \(RTL\) Language Support](#).

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

[Create Field Service Report Templates](#)

In Field Service, 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 Field Service Customer Reports](#)

In Field Service, create service reports to give your customers summaries of the work that your field service team performed.

[Document Builder](#)

Document Builder is the Salesforce Field Service solution for creating richly formatted and branded PDF service documents for your business needs.


SEE ALSO:

[Service Report Fields](#)

Create Field Service Report Templates

In Field Service, 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.
 - b. In Salesforce Classic, from Setup, enter *Digital Signatures* in the Quick Find box, then select **Fields** under Digital Signatures.
 - c. In Lightning Experience, go to Digital Signature in the Object Manager, then click **Fields and Relationships**.
 - d. Click **Signature Type**.
 - e. From the Signature Type Picklist Values related list, add up to 1,000 values. For tips on creating signature types, see [Field Service 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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

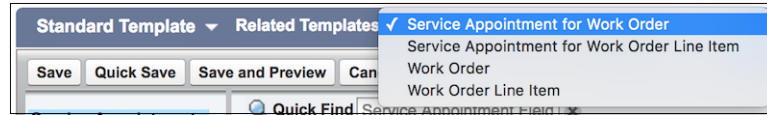
To edit page layouts and picklist values:

- Customize Application

To create service report templates:

- Modify All Data, Customize Application, and View Setup and Configuration


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.



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.

[Field Service 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.

[Field Service 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.

SEE ALSO:

[Service Report Fields](#)

[Service Report Fields](#)

[Create Service Reports in the Field Service Mobile App](#)

Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

 **Note:** If the user generating the service report doesn't have access to the field used to sort the related list, the sorting doesn't occur.

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 [Field Service 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-px wide logo is optimal, wider images are cropped. If the uploaded logo is wider than 220 px, resize the image by dragging its sizing hands 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.

SEE ALSO:

[Service Report Fields](#)

[Service Report Fields](#)

[Apex Trigger: Send Email when Service Report is Created](#)

[Customer Signatures on Service Reports with a Flow](#)

Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

 **Note:** After the service report is created, the signatures collected during the service event are deleted. See [Create Field Service Customer Reports](#) on page 426 for more details.

SEE ALSO:

[Create Field Service Customer Reports](#)

[Service Report Fields](#)

[Service Report Fields](#)

[Customer Signatures on Service Reports with a Flow](#)


Create Field Service Customer Reports

In Field Service, 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.
- To create a service report in the Field Service mobile app, navigate to a service appointment, work order, or work order line item. Tap the action icon, then tap **Create Service Report**.
- 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 service reports:

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

To email a service report:

- View on the parent object AND Send Email

A service report is translated in the language selected in the Service Report Language field on the associated work order. If that field is blank, the report uses the default language of the person generating the report. To add languages, in Settings, use Quick Find to search for Translation Language Settings. Click **Edit** next to the desired language, then click **Active**. To add a user as a translator for the language, select them from the available list and click **Add**, then **Save**.

 **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.

SEE ALSO:

[Service Report Fields](#)

[Create Service Reports in the Field Service Mobile App](#)

[Field Service Guidelines for Using Signatures on Service Reports](#)

[Customer Signatures on Service Reports with a Flow](#)

[Service Report Fields](#)

Document Builder

Document Builder is the Salesforce Field Service solution for creating richly formatted and branded PDF service documents for your business needs.

Document Builder makes it easy to build service document templates and create, update,

- The Template Builder makes it easy to build service document templates.
 - Clone standard service document templates to reflect your company's business practices.
 - Drag seven standard components into the builder: Grid, Image, Image Gallery, Page Numbers, Related Record Table, Rich Text, and Signature.
 - Show relevant information about a record or parent records with spanning fields. Address your specific use cases by building custom LWCs.
- An enhanced service document experience helps you communicate the details of service appointments and collect info to serve your customers.
 - View service documents and collect signatures on the Field Service mobile app.
 - Preview the print documents on desktop.
 - Generate PDFs on mobile or desktop

You can use either Service Reports or Document Builder to create service documents, but only one of these features can be enabled and in use at a time. If you enable Document Builder, the Service Report button is hidden for users. You can continue to use Service Reports, but we suggest adopting Document Builder to get the most out of your service document experience.

[Set Up Document Builder: Licensing and Enablement](#)

Learn how to set up Document Builder and start creating service documents.

[Give Users Access to Document Builder](#)

Assign users the standard permission sets for Document Builder, so they can create service document PDFs.

[Assign Document Builder to Dispatchers and Mobile Workers](#)

Assign Document Builder to users with the Field Service Dispatcher or Field Service Mobile permission set license.

EDITIONS

Available in: Lightning Experience.

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

[Create a Service Document Template](#)

Create a service document template with Document Builder.

[Generate Service Document PDFs on the Desktop Site](#)

With Document Builder, you can generate PDFs from the desktop site and mobile app. This topic walks you through the process for the desktop site.

[Generate Service Document PDFs on the Mobile App](#)

With Document Builder, you can generate PDFs from the desktop site and mobile app. This topic walks you through the process for the Field Service mobile app.

Set Up Document Builder: Licensing and Enablement

Learn how to set up Document Builder and start creating service documents.

Document Builder is the Field Service solution for service documents. You can enable either Service Reports or Document Builder, but not both. The Service Report button is hidden when Document Builder is enabled.

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

2. Select **Enable Document Builder**.

A notification informs you that Salesforce is registering your org. A few minutes later an email notification lets you know whether you're registered. After you're registered, you can start creating service document templates. Only Salesforce admins, with access to the Setup menu, can access the builder experience and create service document templates.

EDITIONS

Available in: Lightning Experience.

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

Give Users Access to Document Builder

Assign users the standard permission sets for Document Builder, so they can create service document PDFs.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Permission Sets**.
2. Select **Field Service Document Builder Dispatcher**, **Field Service Document Builder Mobile**, and **Field Service Document Builder Standard** for permission sets to assign to Field Service technicians, dispatchers, and admin.

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 assign permission sets:

- Manage Users

To create service documents with Document Builder:

- Field Service Document Builder Dispatcher, Field Service Document Builder Mobile, OR Field Service Document Builder Standard permission sets

AND


View Setup and Configurations

SETUP **Permission Sets**

Permission Sets

On this page you can create, view, and manage permission sets.

[All](#) | [Edit](#) | [Delete](#) | [Create New View](#)

[New](#) 

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#)

<input type="checkbox"/>	Action	Permission Set Label ↑	Description	License
<input type="checkbox"/>	Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale Flow...	Cloud Integration User
<input type="checkbox"/>	Clone	Field Service Document Builder Dispatcher	Gives dispatchers access to create Service Documents in the desktop application an...	Field Service Dispatcher
<input type="checkbox"/>	Clone	Field Service Document Builder Mobile	Gives mobile workforce access to create service documents in the mobile application...	Field Service Mobile
<input type="checkbox"/>	Clone	Field Service Document Builder Standard	Gives back office Field Service users access to create service documents in the des...	Field Service Standard
<input type="checkbox"/>	Del Clone	Field Service Integration	Permissions to access data needed for optimization, automatic scheduling, and servi...	
<input type="checkbox"/>	Del Clone	Field Service Mobile LSDK		
<input type="checkbox"/>	Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. Set them up with...	Field Service Mobile
<input type="checkbox"/>	Clone	Salesforce Apex Guru	Gives Apex Guru access to analyze code for anti patterns.	Cloud Integration User
<input type="checkbox"/>	Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce CMS with ...	Cloud Integration User
<input type="checkbox"/>	Clone	SeaS Indexing C2C User Perm	Allows the user to access entities indexed by SeaS indexing pipeline.	Cloud Integration User
<input type="checkbox"/>	Clone	Trust Card Manager	Lets users create, read, edit, and delete trust measures for their location's trust card. ...	Trust Card Manager
<input type="checkbox"/>	Clone	Your Account App Admin User	Manage your Salesforce subscriptions with the Your Account app.	Your Account App

- To assign the permission sets to users, select **Manage Assignments**.

Assign Document Builder to Dispatchers and Mobile Workers

Assign Document Builder to users with the Field Service Dispatcher or Field Service Mobile permission set license.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Permission Sets**.
2. Create a permission set.
3. Give it a name, for example, Field Service Document Builder.
4. Leave the License picklist field blank, and then save your changes.
5. Scroll down to the System section and click **System Permissions**.
6. Click **Edit**, and then select **Document Builder** and **Access Lightning Web Components for Field Service Mobile**. Save your changes.
7. To assign this permission set to users, click **Manage Assignments**.

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 create service documents with Document Builder on the desktop site or the mobile app:

- Field Service Dispatcher permission set license

OR

Field Service Mobile permission set license

AND

View Setup and Configurations

To assign a permission set to mobile workers and dispatchers:

- Manage Profiles and Permission Sets

To create a permission set:

- Manage Users

Create a Service Document Template

Create a service document template with Document Builder.

Create a service document template from Work Order, Work Order Line Item, and Service Appointment.

- From a desktop browser, you can create PDFs from Work Order, Work Order Line Item, and Service Appointment.
 - From the Field Service mobile app, you can generate PDFs only from Service Appointment in Android and from Service Appointment and Work Order in iOS.
1. From Setup, in the Quick Find box, enter *Document Builder*, and then select **Document Builder**.
 2. To create a template, click **New Template**.
 3. To indicate the type of service document you're creating, for example, Service Appointment Debrief, add a label.
 4. Select any object from the dropdown list: **Work Order**, **Work Order Line Item**, or **Service Appointment**. Your selection dictates which object the template is created from and which fields and related lists appear in Document Builder. Click **Next**.
 5. Choose between a blank template and a standard default template. Using a standard template gives you a starting point with added fields and related lists. Now you're ready to start building your service document.

[Template Builder](#)

Build service document templates in Document Builder with the template builder.

[Document Builder Standard Components](#)

Here's a list of standard components available for Document Builder, with descriptions.

[Activate a Service Document Template](#)

Activate a template to create service documents and PDFs with Document Builder.

[Setting the Service Document Template Field \(Beta\)](#)

You can find the standard field Service Document template in the three objects: Work Order, Work Order Line Item, and Service Appointment. This field points to the template ID, which sets the template for each service document. This topic covers how to find the template ID and how to populate the Service Document Template field.

Template Builder

Build service document templates in Document Builder with the template builder.

Available in: Lightning Experience.

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

When you first open a template in Document Builder, you see the template builder, which shows the canvas, components and fields panel, and document settings panel.

EDITIONS

Available in: Lightning Experience.

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

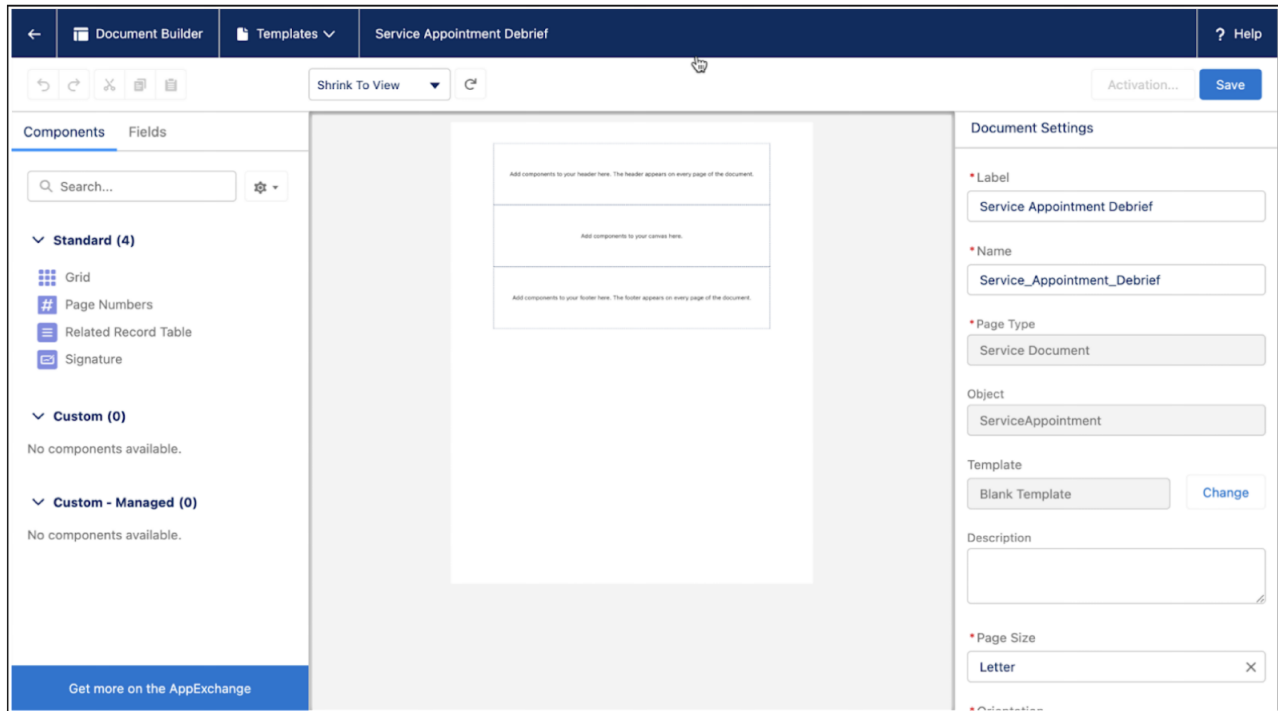
EDITIONS

User Permissions Needed

To create a service document template:	Document Builder
--	------------------

The Canvas

The canvas represents your service document. To design your service document, drag standard LWCs and custom LWCs onto the canvas. If you add any fields or components to the header or footer, they repeat on every page of your document.



When you're designing your header and footer, you can get an error message if you add too much content. What qualifies as too much content depends on the formatting and orientation of your document and the size of the components you're trying to add. If you're having trouble, check that your headers and footers are sized properly. For example, resize any headers or footers that are longer than a page.

Document Settings

To access the document settings, click outside the header, body, and footer sections of the canvas. Use the document settings panel to add a document description, determine which fields and components are visible, remove headers and footers, and alter the document format.

Components and Fields

Drag components and fields from the left panel onto the canvas to easily build document templates. Standard components for Document Builder include Grid, Page Numbers, Related Record Table, Signature, Image, Image Gallery, and Rich Text.

You can drag two types of fields onto the canvas from the field component on the left panel: fields from the template object and spanning fields from the parent of the template object.

When a field is added to the canvas, use the component settings panel on the right to configure the field visibility. For example, you can choose to show a Related Record Table for a work order and its child work order line item only if the work order's work type is Break-Fix.

Lookup fields don't appear on service document templates when dragged onto the canvas. To get the lookup field to show up, search for the lookup field and its associated name. Then, drag the Name field onto the canvas.

When you're done building your template, you're ready to save and activate it. You can access saved templates from the Document Builder page in Setup.

Document Builder Standard Components

Here's a list of standard components available for Document Builder, with descriptions.

Document Builder has the following standard components.

Component	Details
Grid	Lets you divide the canvas into columns. Add the Grid component to the header, body, or footer to divide each section into multiple columns and control the width of each column. To use, drag the Grid component onto the canvas. After you do, you see the Grid settings in the Document Settings menu on the right. Here you can change the number of columns (up to 12), the width of each column, and the space padding between the columns. You can set the visibility of the Grid component and choose to show it only under specific criteria.
Page Numbers	Repeats on all pages of the document. After you add it to the canvas, the Document Settings menu shows the Page Numbers Settings, where you can change the format and alignment.
Related Record Table	Shows records from child objects related to the service document's template object. For example, if the template object is Work Order, the related record table shows records from the Work Order related objects, such as Work Order Line Items, Products Consumed, Expenses, and Time Sheet Entries. When the Related Record Table component is added to the canvas, you can use the component settings panel on the right to configure table details, including: <ul style="list-style-type: none"> • Parent record: This field defaults to the Template object, for example, Service Appointment. • Related entity: This field lets you select which child object's record you want to show in the table. • Related record fields: Add a maximum of 10 related record fields (columns) to the table. • Component visibility: You can make the entire table conditionally visible so it shows only specific criteria. For example, let's say the parent record is Work Order, and the related object is Work Order Line Item. You can choose to show a related record table only if the work order's work type is Break-Fix.
Signature	Captures signatures from customers, partners, and mobile workers on service documents. Define the number of signatures needed by adding signature components to the canvas. Reorder, include, or exclude these fields by specifying settings in the document settings panel. <p>Because these fields are standard fields on a standard object, they're translated in the user's language. You can customize the labels related to the Digital Signature object and rename them to suit your branding and</p>

EDITIONS

Available in: Lightning Experience.

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

Component	Details
	business needs. If you don't change the labels of the object or fields, Salesforce translates the label values for you. If you change labels, or if you want to modify the standard translation provided by Salesforce, you can translate those new labels.
Image	<p>Embeds images into your service document. Add images to your image library. Then, from the document settings panel, select your image, and then use the canvas to add image descriptions and include alt text for accessibility.</p> <p>The image gallery shows all images associated with the object from which you create your service document. While you can dictate the number of images to show per row, you can't modify the total number of images.</p>
Image Gallery	Add as many images per record as you need. It also shows all images related to the service document you're viewing.
Rich Text	Applies styles and formatting options to your text and creates expressions to make custom labels that present information, like help text or error messages, in a user's native language.

Activate a Service Document Template

Activate a template to create service documents and PDFs with Document Builder.

1. In Document Builder, after you've built your first template for a work order, work order line item, or service appointment, click **Save**.
2. Activate the template. If you've saved the template and dismissed the activation window, you can get to it by clicking **Activation**.
3. Click **Assign** and save your work.
Your template is assigned as the default. Assigning a different template as the default overrides prior default template assignments. Only one default template per object can exist at a time.

EDITIONS

Available in: Lightning Experience.

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

EDITIONS

User Permissions Needed

To activate service document templates:	Document Builder
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Setting the Service Document Template Field (Beta)

You can find the standard field Service Document template in the three objects: Work Order, Work Order Line Item, and Service Appointment. This field points to the template ID, which sets the template for each service document. This topic covers how to find the template ID and how to populate the Service Document Template field.

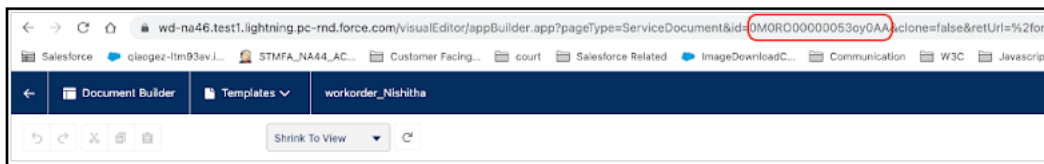
Find the Template ID

To get the template ID, open or create a template in Document Builder. You can find the template ID in the URL, after &id=.

EDITIONS

Available in: Lightning Experience.

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



If the field value is set, that template is used. If the field is empty, then the org default template is used. If the field is empty, you haven't set a default, and you don't have any templates, you receive an error message.

Populate the Service Document Template Field

Populate the Service Document Template field using an Apex trigger, building a flow, or doing a combination of both.

- **Apex Trigger:** You can use an Apex trigger to perform custom actions, such as insertions, updates, or deletions, before or after events to records in Salesforce. The Apex trigger populates the Service Document field upon creating, reading, updating, or deleting any related records. Here's a sample Apex trigger:

```
// Timing options:
// before insert/update/delete
// after insert/update/delete/undelete

// Simple example trigger
trigger PopulateServiceDocument on WorkOrder(before insert) {
  for(WorkOrder wo : Trigger.New) {
    if (wo.Status == "value") {
      wo.ServiceDocumentTemplate = '0M0...';
    }
    // ...
  }
}
```

- **Flow Builder:** Build flows that collect data and perform actions. You can build screen flows that launch after certain criteria are met, guiding users to set fields. Or, build flows that automatically run in the background, using Autolaunched Flow, with no trigger. Flow Builder also lets you run Apex code, including Apex triggers, so play around to see what works best for your document building needs.

Generate Service Document PDFs on the Desktop Site

With Document Builder, you can generate PDFs from the desktop site and mobile app. This topic walks you through the process for the desktop site.

1. Go to a work order, work order line item, or service appointment. To demonstrate, we're using a work order.
2. Click **Create Service Document**.
If you've entered a value in the service document's template field, you land on the corresponding template. Otherwise, if you set a default, but no Service Document Template ID, the default template loads. If you have only one document template for your object, you don't see a list and instead are taken directly to the Service Document preview page.
3. Click **Create PDF**. You get a popup message signaling that your request is queued. When your PDF is ready, you get a notification under the Global Notifications bell.
4. To access the PDFs you create, including an archive of your PDFs, navigate to the work order and click the Related tab. Then scroll down to Service Reports.
5. To view your PDF, click a service report name in the list view.

Generate Service Document PDFs on the Mobile App

With Document Builder, you can generate PDFs from the desktop site and mobile app. This topic walks you through the process for the Field Service mobile app.

Before generating service document PDFs on the Field Service mobile app, enable push notifications on your device. Document Builder uses push notifications to let you know your PDF is ready and error messages let you know when something's gone wrong.

1. Go to a work order, work order line item, or service appointment. Here, we demonstrate with a work order.
2. Click the **Actions** launcher, and then **New Service Document**.
You're redirected to a preview of the Work Summary template, which shows the customer details and work completed and prompts you to collect a signature from the customer.
3. Collect the required customer signature by having them type and sign their name.
4. If you can't collect the signature, click **Can't Collect Signature** and provide a reason. For example, you can record that the representative wasn't present.
5. Click **Save**, and then click **Generate Document** on the following window.
A popup notifies you when the document generation is complete. If you don't see a popup and the process taking a long time, pull down to refresh the page.
6. Click the notification, which takes you back to the Field Service mobile app, where you can see the final PDF of the work summary. This PDF is accessible from the overview tab on the given work order.

If you haven't set a field value or default template, mobile workers can't generate a document. When they click **New Service Document**, they get an error message.

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 generate service document PDFs:

- Document Builder

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 create service document PDFs on the mobile app:

- Field Service permission set license for mobile AND Document Builder

Manage Field Service Asset Attributes

Improve asset management and help mobile workers efficiently repair and maintain assets by defining and monitoring asset attributes that represent asset health and performance. Then, define threshold monitoring based on recordset filter criteria and track threshold compliance for multiple asset attributes.

Watch the video to see how to use asset attributes to track asset health and performance.

 [Watch a video](#)

With Field Service asset attributes, product and asset managers can measure, track, and monitor the health and performance of assets. Use asset attributes to track and analyze large numbers of attributes for products or assets. An asset can have multiple attributes that represent an asset's health and performance.

Asset attributes help mobile workers better understand the condition of assets and let them repair and maintain those assets in the field more efficiently. They also enable asset managers to shift to proactive, and ultimately predictive, service models that promote higher equipment uptime and compliance.

Use custom fields to characterize all assets that share characteristics. They can track slower-changing aspects of health, such as software version, or real-time performance values, such as temperature and pressure. Asset attributes can vary by product and asset and track faster changes.

Each asset attribute has a definition and a value. The definition describes the value and determines its data type. Attribute values appear in the Asset Attributes related list on the asset record.

After defining asset attributes, create thresholds that are based on attributes to monitor your asset's health and performance. For example, define a threshold based on engine temperature or engine pressure and then track the engine for faults. With thresholds, you can see when and where issues occur and take action to prevent or address them.

[Set Up Asset Attributes](#)

Configure your Asset Attributes settings and enable user permissions.

[Create Attribute Definitions](#)

Define the value and data type of an attribute definition before you add it to an asset attribute.

[Create Asset Attributes](#)

Create an asset attribute by associating it with an attribute definition on the asset record.

[Manage Threshold Monitoring for Field Service Asset Attributes](#)

Set up monitoring based on recordset filter criteria defined for asset fields and asset attributes. Recordset Filter Criteria Monitoring uses the thresholds defined by recordset filter criteria for the fields and attributes to determine whether they're within the defined thresholds.

[Asset Attributes Limitations and Considerations](#)

Before you set up Asset Attributes, review its limitations and considerations.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Set Up Asset Attributes

USER PERMISSIONS

To configure Asset Attributes:	Customize Application
To enable permissions:	Manage Profiles and Permission Sets
To customize related lists:	Customize Application
To create and manage restriction rules:	Manage Sharing
To view restriction rules:	View Setup & Configuration AND View Restriction and Scoping Rules

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Configure your Asset Attributes settings and enable user permissions.

Before you create and manage asset attributes, make sure that you complete these tasks.

1. Enable user permissions for attribute definitions and units of measure.
 - a. From Setup, in the Quick Find box, enter *users*, and then select **Profiles**.
 - b. Select the relevant profile, and then click **Edit**.
 - c. In Tab Settings, select **Default On** for Attribute Definitions and Units of Measure.
 - d. In Standard Object Permissions, enable basic access permissions for Attribute Definitions and Units of Measure.
2. Add picklist values for units of measure.
 - a. From the object management settings for units of measure, go to Fields and Relationships.
 - b. Select **Type** and add picklist values (for example Imperial or Metric).
3. (Optional) Customize the fields to appear in the Asset Attributes related list. In the page layout of the Asset object, select the fields to show.
4. (Optional) Create restriction rules for asset attributes when sharing asset records. The rules prevent sharing confidential asset attributes along with the asset record. From the object management settings for asset attributes, go to Restriction Rules and click **Create New Rule**.

SEE ALSO:

[Find Object Management Settings](#)

[Customize Related Lists](#)

[Create a Restriction Rule](#)

[Restriction Rule Considerations](#)

Create Attribute Definitions

Define the value and data type of an attribute definition before you add it to an asset attribute.

1. From the App Launcher, find and select **Attribute Definitions**.
2. Click **New** and enter a name, a label, and a developer name.
3. Select the data type. If you select the picklist data type, select an attribute picklist. If you select the number data type, select a unit of measure.
4. To show the associated asset attributes in the asset record's related list, select **Active**.
5. Set a default value for asset attributes that use this attribute definition.
6. If values for asset attributes using this attribute definition are required, select **Required**.
7. Enter a description and a source system ID.
8. Save the attribute definition. After you add asset attributes to an attribute definition, you can't change the data type or the picklist for a picklist data type.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 attribute definitions:

- Create on Attribute Definition

To view attribute definitions:

- Read on Attribute Definition

To edit attribute definitions:

- Update on Attribute Definition

To delete asset attributes:

- Delete on Attribute Definition

Create Asset Attributes

Create an asset attribute by associating it with an attribute definition on the asset record.

Create asset attributes only for active attribute definitions. If an attribute definition is deactivated, all asset attributes associated with it become unavailable.

1. From the App Launcher, find and select **Assets**.
2. Click the relevant asset record and open the Related tab.
3. Click **New**.
4. Select an attribute definition. Only active attribute definitions are shown.
5. Enter a value for the asset attribute. The asset attribute value is required if designated as Required in the attribute definition you selected. Otherwise, if you don't enter a value, the attribute definition's default value is used. If the attribute definition is of type picklist, the Display Value field of Attribute Picklist Value is used when displaying picklist values.
6. Save the asset attribute.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 asset attributes:

- Create on Asset

To view asset attributes:

- View on Asset

To edit asset attributes:

- Edit on Asset

To delete asset attributes:

- Delete on Asset

Manage Threshold Monitoring for Field Service Asset Attributes

Set up monitoring based on recordset filter criteria defined for asset fields and asset attributes.

Recordset Filter Criteria Monitoring uses the thresholds defined by recordset filter criteria for the fields and attributes to determine whether they're within the defined thresholds.

[Recordset Filter Criteria Monitoring and Thresholds](#)

An asset manager can define recordset filter criteria monitors that monitor an asset by considering one or more asset fields and asset attributes filtered by recordset filter criteria.

[Set Up Threshold Monitoring](#)

Add the Threshold Monitoring Lightning web component to the asset record page.

[Create Recordset Filter Criteria for Asset Fields and Attributes](#)

Create recordset filter criteria based on asset fields or asset attributes. Then, add the recordset filter criteria to a recordset filter criteria monitor to monitor threshold compliance.

[Create Thresholds](#)

After creating the recordset filter criteria, add it to a recordset filter criteria monitor to monitor the threshold compliance of an asset's fields and attributes.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Recordset Filter Criteria Monitoring and Thresholds

An asset manager can define recordset filter criteria monitors that monitor an asset by considering one or more asset fields and asset attributes filtered by recordset filter criteria.

The recordset filter criteria monitor uses thresholds for the fields and attributes to determine whether the values comply with the filter definitions. You can, for example, define a threshold based on attributes such as engine temperature, engine pressure, engine oil level, engine air influx, and RPM. You can then monitor the engine for faults by monitoring these attributes.

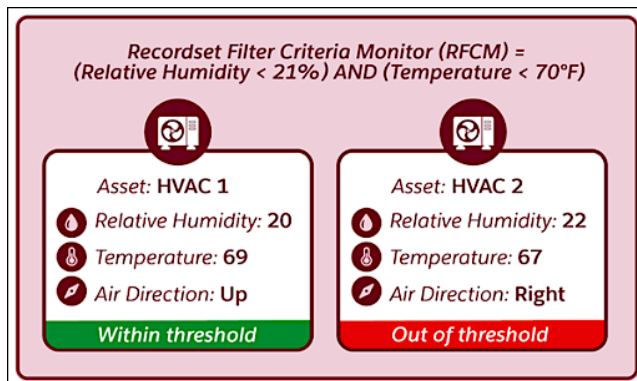
Example: Air Conditioning Unit (HVAC)

Attribute Definition	Data Type	Unit of Measure
Relative Humidity	Number	%
Temperature	Number	Degrees F
Air Direction	Picklist	Picklist values: up, down, right, left

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



The asset's Attributes tab shows a card for each threshold defined for the asset. The cards show the compliance status of a threshold depending on whether it meets the recordset filter criteria conditions. If a recordset filter criteria condition is invalid, an Undetermined compliance status is shown on the threshold card.

Set Up Threshold Monitoring

Add the Threshold Monitoring Lightning web component to the asset record page.

1. From the object management settings for assets, go to Lightning Record Pages.
2. Select the relevant Lightning record page, and then click **Edit**.
3. In Lightning App Builder, create a custom tab and name it Attributes.
4. Drag the Threshold Monitoring component onto the canvas.
5. Save your work and activate the Lightning record page.

SEE ALSO:

[Find Object Management Settings](#)

[Create and Configure Lightning Experience Record Pages](#)

[Add and Customize Tabs on Lightning Pages Using the Lightning App Builder](#)

[Activate Lightning Experience Record Pages](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 Lightning pages in the Lightning App Builder:

- Customize Application

Create Recordset Filter Criteria for Asset Fields and Attributes

Create recordset filter criteria based on asset fields or asset attributes. Then, add the recordset filter criteria to a recordset filter criteria monitor to monitor threshold compliance.

1. From the App Launcher, find and select **Recordset Filter Criteria**.
2. Click **New** and enter a name and a description for the recordset filter criteria.
3. For Source Object, select **Recordset Filter Criteria Monitor**.
4. For Filtered Object, select **Asset**.
5. In the Conditions section, select the relevant option for when the recordset filter criteria is valid.
6. Add filter conditions.
7. Save the recordset filter criteria.

After you create a recordset filter criteria, recordset filter criteria rules for each asset field or asset attribute used in the recordset filter criteria are created for you.

SEE ALSO:

- [Guidelines for Recordset Filter Criteria](#)
- [Recordset Filter Criteria Fields](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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, create, and update recordset filter criteria:

- View, create, and edit on Asset, Recordset Filter Criteria, and Recordset Filter Criteria Rule
- AND
- View on Attribute Definition
- AND
- Delete on Recordset Filter Criteria Rule

Create Thresholds

After creating the recordset filter criteria, add it to a recordset filter criteria monitor to monitor the threshold compliance of an asset's fields and attributes.

1. From the App Launcher, find and select **Assets**.
2. Click the relevant asset record and open the Attributes tab. If you don't see the Attributes tab, refresh the page.
3. Click **New Threshold** and enter a name and a description for the recordset filter criteria monitor.
4. Select a recordset filter criteria defined for the asset.
5. Save the recordset filter criteria monitor.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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, view, edit, or delete a recordset filter criteria monitor:

- Create, Read, Update, or Delete on Recordset Filter Criteria

Asset Attributes Limitations and Considerations

Before you set up Asset Attributes, review its limitations and considerations.

Limitations

- Asset Attributes is limited to 25 attributes per asset.
- Bulk inserts or updates of asset attributes are limited to 2,000 in one API operation.
- Asset threshold monitoring display is limited to 50 threshold cards.
- Asset threshold monitoring uses platform events, which together are limited to 2,000 concurrent users viewing real-time threshold updates on the asset's record page. These platform events don't impact your Salesforce org's [platform event limitation](#).
- If a recordset filter criteria's custom logic condition is empty and a recordset filter criteria monitor is created for this recordset filter criteria with Asset, deleting the recordset filter criteria rule doesn't perform recordset filter criteria evaluation or update the threshold card data.
- When adding a recordset filter criteria rule via API, you must manually add the custom logic.
- When creating or updating a recordset filter criteria with a custom logic condition, you must open and close parentheses in the expression as needed. If the parentheses are missing, the recordset filter criteria evaluation fails, and the threshold field in the card isn't updated.
- For the number, price, and currency data type of fields and number data type of attributes, you must explicitly add the value zero to the recordset filter criteria custom logic when fields or attributes in the asset have an empty value.
- Real-time updates on formula fields aren't supported.
- Real-time updates aren't reflected on the threshold cards in these cases.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- When you add or delete a recordset filter criteria monitor that's associated with an asset.
- When you update the label of an asset attribute or asset field that's associated with a recordset filter criteria.
- When you update the user permissions of asset attributes.
- When you create a custom field for an asset and use it to monitor that asset.

Considerations

- These setup options in Object Manager for asset attributes aren't supported.
 - Validation rules
 - Record types
 - History tracking
 - Buttons, links, and actions
- For custom objects that have related attribute definitions, add the Datatype field to the Attribute Definition related list to show the Default Value field correctly on the related list.
- The Threshold card is presented only to users with Edit permissions on Asset.
- The Delete action appears in the threshold card and in the Asset Attribute related list even if the user doesn't have Delete permissions. An error message is shown if the user tries to delete.

Manage Field Service Outcome-Based Contracts

With Outcome-Based Contracts, service providers can provide their customers with an easy way to assess the compliance of a service contract by letting them track and measure service outcomes. Compliant service contracts ensure high quality of service and customer success.

Outcome-based contracts are result-based and focus on the outputs, quality, and outcomes of a provided service.

Service providers can provide their customers with measurable business KPIs to track and assess the quality of service they're getting.

For example, letting customers track the charging speed of an electric vehicle ensures the on-time replacement of its battery.

Tying the quality of service to the achievement of specific, measurable performance standards and requirements also helps customers to better evaluate payment, contract extensions, or contract renewals.

You can evaluate the compliance of a service contract by creating contract line outcomes that capture data in an automated process that runs according to the criteria, frequency, and calculation method that you define.

When a service contract starts, the automated process records data and evaluates the compliance of the contract. The results that show whether the contract is compliant appear in the Compliance Status field of the contract line outcome.

[Set Up Outcome-Based Contracts](#)

Assign users permissions to manage contract line outcomes for Outcome-Based Contracts and create recordset filter criteria that allow you to define the criteria to evaluate contract compliance.

[Create Contract Line Outcomes for Outcome-Based Contracts](#)

Create and monitor contract line outcomes for Outcome-Based Contracts to easily evaluate the compliance of service contracts.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Set Up Outcome-Based Contracts

Assign users permissions to manage contract line outcomes for Outcome-Based Contracts and create recordset filter criteria that allow you to define the criteria to evaluate contract compliance.

Assign User Permissions

Give users access to Outcome-Based Contracts.

1. Assign users basic access permissions to create and manage contract line outcomes.
 - a. From Setup, in the Quick Find box, enter `users`, and then select **Profiles**.
 - b. Select the relevant profile, and then click **Edit**.
 - c. In Standard Object Permissions, enable basic access permissions for contract line outcomes.
2. Set the field-level security of the Service Contract and Recordset Filter Criteria fields on the Contract Line Outcome object.
 - a. From the object management settings for contract line outcomes, go to Fields and Relationships.
 - b. For both fields, click **Set Field-Level Security** and make the field-level security visible for the relevant profiles.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To enable permissions:

- Manage Profiles and Permission Sets

To edit field-level security for fields:

- Customize Application

Create Recordset Filter Criteria

Create recordset filter criteria for contract line outcomes. Recordset filter criteria allow you to define the criteria to evaluate contract compliance.

1. From the App Launcher, find and select **Recordset Filter Criteria**.
2. Click **New**.
3. Enter a name and a description.
4. For Source Object, select **Contract Line Outcome**.
5. For Filtered Object, select **Asset**.
6. Select **Active**.
7. In the Conditions section, select the relevant option for when the recordset filter criteria is valid.
8. Add filter conditions.
 - a. For Criteria Field, select a numeric asset field or asset attribute.
 - b. Select the operator and the value to match on.
9. Save the recordset filter criteria.

USER PERMISSIONS

To view, create, and update recordset filter criteria:

- View, create, and edit on Asset, Contract Line Outcome, Recordset Filter Criteria, and Recordset Filter Criteria Rule

AND

Delete on Recordset Filter Criteria Rule

Create Contract Line Outcomes for Outcome-Based Contracts

USER PERMISSIONS

To create contract line outcomes: Create on Contract Line Outcome

To edit contract line outcomes: Edit on Contract Line Outcome

To delete contract line outcomes: Delete on Contract Line Outcome

To view contract line outcomes: View on Contract Line Outcome

To view contract line outcome data records: View on Contract Line Outcome

To delete contract line outcome data records: Delete on Contract Line Outcome

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Create and monitor contract line outcomes for Outcome-Based Contracts to easily evaluate the compliance of service contracts.

1. From the App Launcher, find and select **Contract Line Outcomes**.
2. Click **New**.
3. Enter a name and a description.
4. Select the contract line item associated with the contract line outcome.
5. Select the data capturing duration. Then, select the capture frequency and the calculation method. Data capturing runs according to the frequency and calculation method you select.

Important:

- The contract line outcome's start date can't be before the contract line item's start date or after the contract line item's end date.

- The contract line outcome's start date must be in the present or in the future.
- The contract line outcome's end date can't be on or after the contract line item's end date.

6. Select a recordset filter criteria. The recordset filter criteria allows you to define the criteria to evaluate contract compliance.

7. Save the contract line outcome.

8. In the Contract Line Outcomes list view, you can edit or delete a contract line outcome.

You can edit these fields only if the contract line outcome's start date hasn't passed and if no contract line outcome data records are associated with it.

- Recordset Filter Criteria
- Start Date
- End Date
- Capture Frequency
- Calculation Method



Warning: Deleting a contract line outcome deletes all the contract line outcome data records associated with it.

You can view the details of a contract line outcome to check the compliance of your service contract. The contract line outcome's automated process performs data capturing according to the criteria, frequency, and calculation method that you define. It then evaluates the compliance of the service contract. The Compliance Status field indicates whether the contract is compliant. After data capturing is complete, the next data capture date is shown according to the capture frequency that you define.

Contract line outcome data records are created as part of the contract line outcome's automated process of data capturing. These records include the captured data information and the calculation value for a specific data capture run on a specific date.



Important: You can delete a contract line outcome data record only if the associated contract line outcome's end date has passed.

Optimize Your Field Service Schedule

Use schedule optimization to create an optimal schedule and help comply with service-level agreements while minimizing travel time, overtime, costs, and no-shows.



This is a Field Service managed package feature.

[Manage Scheduled Jobs in Field Service](#)

Optimize your team's Field Service 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 Field Service 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 Field Service Resource's Schedule](#)

In Field Service, 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.

[Monitor Field Service Schedule Optimization Requests](#)

Keep an eye on all Field Service schedule optimization requests from the Gantt or the Optimization Requests custom tab.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

[Gain Visibility into Optimizations with Field Service Optimization Insights](#)

In Field Service, learn at a glance if a global or in-day optimization reduces travel time or improves utilization. As you refine a scheduling policy, view a snapshot of optimization results and KPI changes.

[Explore Metrics in Field Service Optimization Hub](#)

View Optimization Hub to learn what improvements optimization made to the scheduling of service appointments across multiple territories and how to get the best results from optimization.

[Get Recommendations with Field Service Appointment Insights \(Beta\)](#)

Learn how Appointment Insights helps to improve the scheduling of service appointments.

SEE ALSO:[Get Ready for Scheduling and Optimization](#)[Adopt and Implement Enhanced Scheduling and Optimization](#)[Work in the Field Service Dispatcher Console](#)[Get Ready for Field Service Scheduling and Optimization](#)[Activate Field Service Schedule Optimization](#)[Fix Field Service Scheduling Overlaps](#)[Group Nearby Field Service Appointments](#)[Fill Schedule Gaps in Field Service](#)

Manage Scheduled Jobs in Field Service

Optimize your team's Field Service 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.*

[Manage Scheduled Jobs When Using Enhanced Scheduling and Optimization](#)

To run optimization manually from the dispatcher console, in the appointment list action menu, use the Optimize option. Define the service territories, scheduling policy, and other information. Or, follow the steps to set up a scheduled job.

[Manage Scheduled Jobs When Not Using Enhanced Scheduling and Optimization](#)

To run optimization manually from the dispatcher console, in the appointment list action menu, use the Optimize option. Define the service territories, scheduling policy, and other information. Or, follow the steps to set up a scheduled job.

SEE ALSO:

[Configure Enhanced Optimization per Territory](#)

Manage Scheduled Jobs When Using Enhanced Scheduling and Optimization

To run optimization manually from the dispatcher console, in the appointment list action menu, use the Optimize option. Define the service territories, scheduling policy, and other information. Or, follow the steps 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 **Field Service Admin**, and then click **Field Service Settings**.
 - b. Under Optimization, click **Logic**.
 - c. Under Global Optimization, select the service appointment statuses to exclude from schedule optimization.
 - d. Save your changes. The settings apply to optimizations that you run manually or in a scheduled job.
2. Open the Scheduled Jobs tab.
3. Click **New Job**.
4. Give the job a unique name, and for Automator Type, select **Enhanced Optimization**.
5. In the General tab:
 - a. Add up to 10 time periods, within 30 days.

Specifying multiple time periods in the same job lets you set up one job for multiple optimization horizons instead of setting up separate jobs for each horizon. Each time period generates its own optimization request and runs in parallel. The time periods also allow you to create a job that starts on a future date.
 - b. Select a scheduling policy. This scheduling policy is applied to the entire scheduled job unless you specify scheduling policies for individual territory groups in the Territory tab.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


USER PERMISSIONS


To optimize from the dispatcher console: One of these custom permission sets:

- FSL Admin Permissions
- FSL Dispatcher Permissions

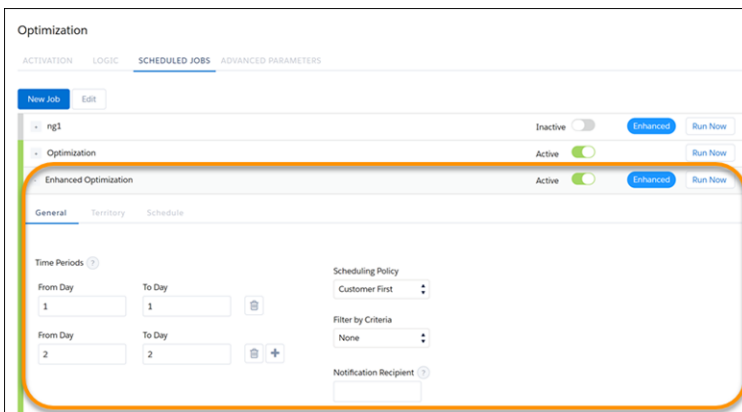
To create a scheduled job:

- FSL Admin Permissions custom permission set

- c. To specify the type of appointments that are optimized, select a filter. Only appointments that meet the criteria are optimized.
 - d. In Email Recipient Username, enter the username, and then select from the list. The field shows the email address. Use an email address where you want optimization job failure messages to be sent.
6. In the Territory tab:
 - a. Search for and select up to 100 service territories and create a group. Only active service territories with Enhanced Scheduling and Optimization enabled are available for selection.
 - b. Create up to 50 groups.
 - c. Select a scheduling policy for each group.
-  **Note:** Each optimization request includes all the service territories in the group for each time period defined in the General tab. For example, if you have three time periods and five groups, 15 optimization requests run.
7. In the Schedule tab:
 - a. Select the frequency.
 - b. If this job is a recurring job, enter the details.
 8. If your optimization job is ready to run, activate the job.
 9. Save your changes.
 10. To run the job immediately without waiting for the scheduled time, click **Run Now**.

 **Example:** If all service appointments have arrival windows, set up time periods for individual days. The arrival windows force the service appointments to be scheduled on a specific day, and they can't be scheduled by another optimization request running for a different time period. That way, the optimization focuses only on relevant options and results in a more optimized schedule.

If your optimization horizon includes more appointments than the allowed amount per optimization request, split the job into time periods. That way, each optimization request is within the limit.



Considerations:

- The optimization requests that run for each group within each time period are counted toward the schedule optimization request limits detailed in [Schedule Optimization Request Limits](#) on page 11. The entire scheduled job is counted as one job toward the limitation detailed in [Schedule Optimization Request Limits](#) on page 204, regardless of the number of groups in the job. Setting up groups with scheduling policies helps you avoid reaching your org limits.
- If you create multiple time periods and data overlaps between these periods, the parallel requests can conflict and result in incorrect schedules.

- Optimization applies only to service appointments whose parent appointment is a work order or work order line item.
- Global optimization attempts to reschedule appointments that have rule violations. If it doesn't manage to reschedule them, the appointments remain unscheduled.
- 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 validation are unscheduled.
- The same service appointments can appear in multiple optimization requests, possibly resulting in incorrect results.
- If you edit the name of the job, the groups are deleted. To avoid this issue, before editing the name, refresh your browser.

Manage Scheduled Jobs When Not Using Enhanced Scheduling and Optimization

To run optimization manually from the dispatcher console, in the appointment list action menu, use the Optimize option. Define the service territories, scheduling policy, and other information. Or, follow the steps 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 select **Field Service Admin**, and then click **Field Service Settings**.
 - b. Under Optimization, click **Logic**.
 - c. Under Global Optimization, select the service appointment statuses to exclude from schedule optimization.
 - d. Save your changes. The settings apply to optimizations that you run manually or in a scheduled job.
2. Open the Scheduled Jobs tab.
3. Click **New Job**.
4. Give the job a unique name, and for Automator Type, select **Optimization**.
5. Enter the optimization job's details.
 - 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 job is ready to run, activate the job.
 - i. To run the job immediately without waiting for the scheduled time, click **Run Now**.
 - j. Save your changes.

Considerations:

- 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 validation are unscheduled.
- Emails are sent only when optimization jobs fail to initiate. If the optimization job succeeds or fails in a later stage, an email isn't sent.

Considerations for Optimization Run Time:


Optimization run time corresponds to the thoroughness of a scheduled optimization job. The higher the run time, the closer you get to an optimal schedule.

To set your preferred optimization run time, from the App Launcher, find and open the **Field Service Admin** app. Click **Field Service Settings > Optimization > Logic**. In the **Optimization run time per service appointment** field, select **Low**, **Medium**, or **High**, and save your changes. You can decide to change your run time before a particular optimization job.

For better-quality results, use **High**. For quicker results, use **Low**. In many cases, Low is enough to produce a satisfactory schedule. Regardless of your run time setting, run time never exceeds two hours. The run time ratio for Low:Medium:High is 1:2:3, so High-level optimization takes three times as long as Low-level optimization.

Longer run times can be beneficial in the following scenarios.

- Many candidates per service appointment—Service resources are considered candidates for a service appointment if they comply with the applied scheduling policy's work rules. For example, a scheduling policy can require candidates to be working in the relevant service territory in the required time, to have the required skills, and to have a home base that is within the maximum travel range from the service appointment. If a service appointment has many candidates, a longer run time allows the optimizer to consider more scheduling options.
- Service resources start their day from a centralized service depot—When many service resources start from the same place and could potentially be routed to the same appointments, more run time helps the optimizer determine the optimal routes.
- Service appointments have the same priority—Higher-priority service appointments serve as anchors during optimization and narrow down scheduling options. When all, or most, service appointments have the same priority, more time is needed to determine the optimal routes.

- **Complex work** A complex work chain is a chain of related service appointments. The dependency could be the chronological order of the service appointments, or that they have to be done by the same service resource. Complex work requires more computation time. If complex work is common, consider allowing more run time.
 - **Street-Level Routing (SLR)**—Aerial travel times require a quick arithmetic calculation. For SLR, the optimizer requires additional time to fetch travel times from a GIS server. However, as optimization continues to be used, Field Service learns your service territories' SLR travel times and grows more efficient. When optimizing a new service territory, a longer run time is recommended.
-  **Note:** 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.

SEE ALSO:

- [Optimize a Single Field Service Resource's Schedule](#)
- [Monitor Field Service Schedule Optimization Requests](#)
- [Field Service Limits and Limitations](#)
- [Optimize a Single Resource's Schedule](#)
- [Monitor Optimization Requests](#)

Optimize Today's Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 scheduling policies:

- Custom permission set: FSL Admin Permissions

To run in-day optimization: One of these custom permission sets:

- FSL Admin Permissions
- FSL Dispatcher Permissions

Optimize a Single Field Service Resource's Schedule

In Field Service, 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.
 - d. If you select **Only optimize unscheduled appointments**, only unscheduled service appointments are considered, and all scheduled service appointments are pinned (unmovable). If the setting is deselected, all service appointments within the time frame that meet the criteria are considered during optimization.
 - e. To optimize your schedule based on rules and objectives defined by your company, select a scheduling policy. If no scheduling policy is provided, resource schedule optimization fails.
 - f. Select which category of service appointments are considered as candidates to be scheduled in the optimization process.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To see Resource Schedule Optimization on the Gantt:

- Resource Schedule Optimization custom permission

- g.** In Keep these appointments scheduled, select which service appointments must remain on the schedule during resource schedule optimization. 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. If the resulting schedule doesn't include all the service appointments marked to keep scheduled, resource schedule optimization fails. To optimize, give these appointments a much higher priority than the other appointments or try to run optimization on more days.
- h.** Select whether only service appointments scheduled to the resource are considered in the optimization process. If you don't select the checkbox, unscheduled service appointments, appointments scheduled to the resource, and appointments scheduled to other resources are considered during optimization. When using Enhanced Scheduling and Optimization, if you select to only schedule appointments to the resource, both unscheduled service appointments and appointments scheduled to the resource are considered. When not using Enhanced Scheduling and Optimization, only service appointments scheduled to the resource are considered, such that this checkbox overrides Only optimize unscheduled appointments.
- i.** 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.

SEE ALSO:

[Manage Scheduled Jobs When Not Using Enhanced Scheduling and Optimization](#)

[Monitor Field Service Schedule Optimization Requests](#)

[Monitor Field Service Schedule Optimization Requests](#)


Monitor Field Service Schedule Optimization Requests

Keep an eye on all Field Service 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.

EDITIONS

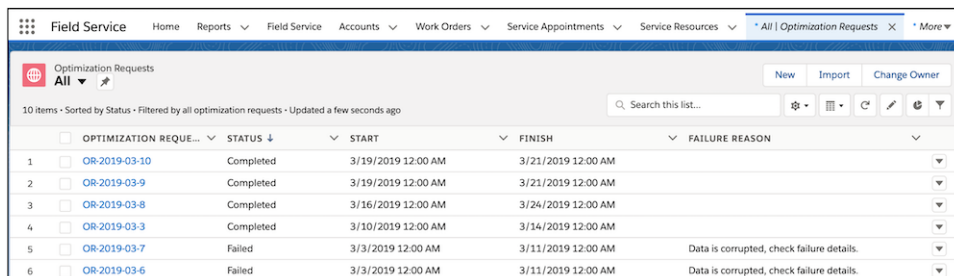
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To cancel optimization requests:

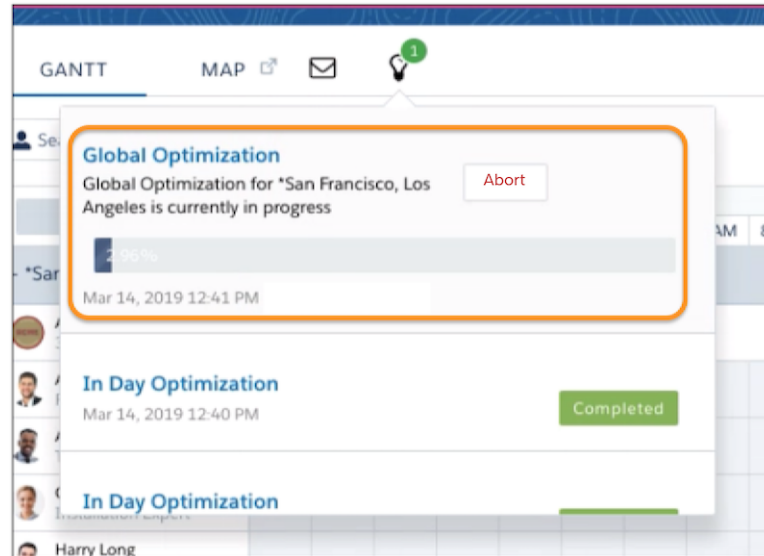
- Abort Optimization Request custom permission



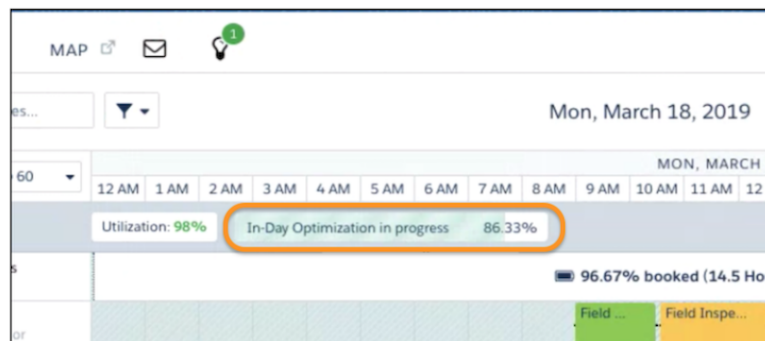
	OPTIMIZATION REQUE...	STATUS	START	FINISH	FAILURE REASON
1	OR-2019-03-10	Completed	3/19/2019 12:00 AM	3/21/2019 12:00 AM	
2	OR-2019-03-9	Completed	3/19/2019 12:00 AM	3/21/2019 12:00 AM	
3	OR-2019-03-8	Completed	3/16/2019 12:00 AM	3/24/2019 12:00 AM	
4	OR-2019-03-3	Completed	3/10/2019 12:00 AM	3/14/2019 12:00 AM	
5	OR-2019-03-7	Failed	3/3/2019 12:00 AM	3/11/2019 12:00 AM	Data is corrupted, check failure details.
6	OR-2019-03-6	Failed	3/3/2019 12:00 AM	3/11/2019 12:00 AM	Data is corrupted, check failure details.

From the Gantt

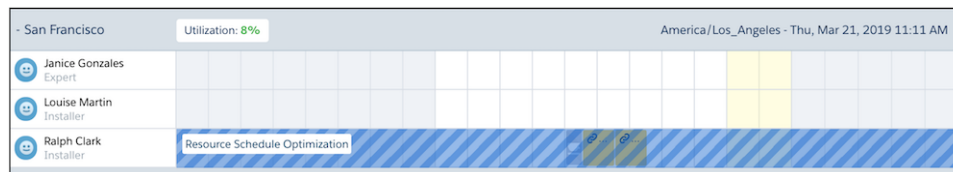
Click the lightbulb icon at the top of the Gantt to view the status of recent optimization requests. When a global optimization request is in progress, you can see a percentage-based progress bar and the option to cancel the request.



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](#).

SEE ALSO:

[Optimize a Single Field Service Resource's Schedule](#)

[Manage Scheduled Jobs When Not Using Enhanced Scheduling and Optimization](#)

[Optimize a Single Field Service Resource's Schedule](#)

[Work in the Field Service Dispatcher Console](#)


[Monitor the Automatic Bundling Requests](#)

Gain Visibility into Optimizations with Field Service Optimization Insights

In Field Service, learn at a glance if a global or in-day optimization reduces travel time or improves utilization. As you refine a scheduling policy, view a snapshot of optimization results and KPI changes.

 *This is a Field Service managed package feature.*

Insights are available for global and in-day optimization requests that complete successfully. They aren't supported for resource schedule optimization.

 **Note:** Optimization Insights is not available when using Enhanced Scheduling and Optimization.

1. In **Field Service Settings > Optimization**, enable **Optimization Insights**.

 **Note:** Make sure that the [Optimization Profile](#) has access to the `OAASRestInsights` and `OAASRestHealthCheck` [Apex classes](#).

2. Edit an optimization request page in Lightning App Builder.
3. From the custom managed package components, add the optimization insights components.
4. Save your changes, and activate the page if necessary.
5. Submit a global or in-day optimization.

If the optimization completes successfully, insights appear on the optimization request.

There are four optimization insights components: summary (1), metrics (2), key performance indicators (3), and health check (4).

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 edit Lightning pages:

- Customize Application

To view Lightning pages in the Lightning App Builder:


- View Setup and Configuration

To add components to optimization request pages: One of these custom permission sets:

- FSL Admin Permissions
- FSL Dispatcher Permissions

Summary

The summary component shows details about the optimization request, such as status, horizon, and territories. It displays the Time per Appointment from Field Service optimization settings, and lists Boolean filters that selected appointments in the request. As you refine a scheduling policy, the summary gives you a point-in-time snapshot of the policy, including the work rules and weighted service objectives, that produced the insights.

 **Note:** Some details are only available for global optimization requests.

Metrics

Metrics provide an overview of scheduling information, such as how many appointments were scheduled from the pool of optimizable appointments. Optimizable appointments are unpinned and can be moved.

KPI

The KPI component displays key performance indicators by territory before and after the optimization.


KPI	How the KPI is Calculated
Average Travel per Appointment with Homebase	Total estimated travel time, including travel from and to the resource's home base, divided by the count of scheduled service appointments.
Average Travel per Appointment without Homebase	Total estimated travel time, excluding travel from and to the resource's home base, divided by the count of scheduled service appointments.
Total Travel with Homebase	Total estimated travel, including travel from and to the resource's home base, for all scheduled service appointments.
Total Travel without Homebase	Total estimated travel, excluding travel from and to the resource's home base, for all scheduled service appointments.
Total Scheduled Appointments	Count of scheduled service appointments.

KPI	How the KPI is Calculated
Total Duration Scheduled	Total duration for the scheduled service appointments.
Utilization	Total duration and travel time for the scheduled appointments, divided by overall resource capacity. To learn how we calculate capacity, see Considerations.
Utilization Wrench	Total duration for the scheduled service appointments, divided by the overall resource capacity. Utilization wrench represents total direct labor. To learn how we calculate capacity, see Considerations.

Health Check

The Health Check component summarizes the results of a suite of tests and validates your data. For example, the tests check if the appointment exceeds the available time to complete or whether the required resource has the necessary skills. Before you drill down into your KPIs, make sure that all the tests passed successfully.


Considerations

- For Utilization and Utilization Wrench KPIs, capacity is the total available work time from shifts and operating hours in primary territory memberships, including overtime. We subtract breaks, absences, and crew allocations; we also add or subtract availability from relocations.
 -  **Note:** We subtract absences only if the entire absence of a resource is included in the time period of that resource's service territory membership record.
- For the Total Duration Scheduled KPI, we subtract appointments' Scheduled Start times from Scheduled End times. For multiday appointments, we include them in the total if the appointments are completely within the horizon; for those appointments, we add the Duration fields.
- In metrics, the resource count excludes capacity-based resources and partial or full crew assignments that occur during the horizon.
- The components list metrics and KPIs by territory. For resources with secondary territory memberships, there are some nuances for allocating time to territories. For example, we allocate travel time to the territory referenced in a service appointment. We also allocate scheduled duration based on an assigned resource's primary service territory membership.
- Optimization insights only support service appointments that have territories. Service appointments without a territory don't affect metrics and KPIs.

Explore Metrics in Field Service Optimization Hub

View Optimization Hub to learn what improvements optimization made to the scheduling of service appointments across multiple territories and how to get the best results from optimization.

 *This is a Field Service managed package feature.*

 **Note:** Optimization Hub is available only when you're using Enhanced Scheduling and Optimization. When it's enabled, a rich set of metrics for evaluating the optimization process is added automatically.

Watch the video to see how to use the Optimization Hub dashboard to gain insights into how scheduling optimization improves your business metrics.

 [Watch a video](#)

EDITIONS

Available in: Lightning Experience

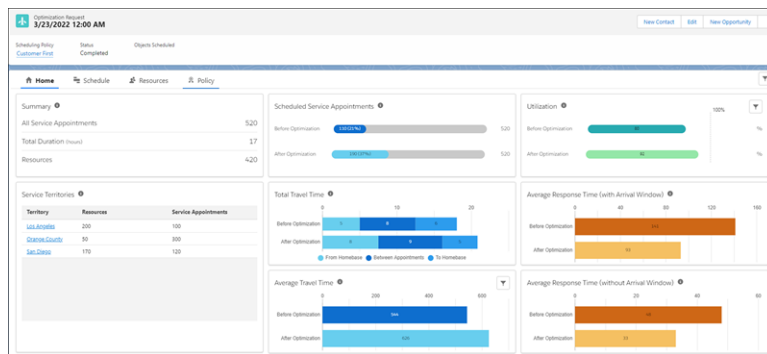
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

Optimization Hub is a centralized dashboard where operation managers and business analysts can view and track all optimization information related to an optimization request. It gives you visibility into how scheduling optimization affects your business.

Optimization Hub updates the scheduling results after every optimization run and gives you a comprehensive comparison of different metrics before and after optimization and across multiple territories. It shows you what improvements optimization has made, and it provides guidance on how to get more out of your optimization settings. By adjusting your scheduling policy and prioritizing your business objectives, you can get even better scheduling results compared to your last optimization run.

Optimization Hub considers only the service appointments that have territories. Service appointments without a territory don't affect metrics and key performance indicators.

Optimization Hub includes information relevant to scheduling, service resources, and the scheduling policy. For example, it tracks the improvement of travel time, service resource utilization, and response time.



[Set Up Optimization Hub](#)

Configure your Optimization Hub settings and learn about the limitations of Optimization Hub.


[Access Optimization Hub](#)

View Optimization Hub to get a snapshot of different metrics before and after optimization and across multiple territories.

Set Up Optimization Hub

Configure your Optimization Hub settings and learn about the limitations of Optimization Hub.

 *This is a Field Service managed package feature.*

 **Note:** Optimization Hub is available only when you're using Enhanced Scheduling and Optimization.

[Configure Optimization Hub](#)

Add the Optimization Hub Lightning web component to the optimization request record page.

[Limitations for Optimization Hub](#)

All Enhanced Scheduling and Optimization limitations apply to Optimization Hub.

EDITIONS

Available in: Lightning Experience

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

Configure Optimization Hub

Add the Optimization Hub Lightning web component to the optimization request record page.

Before you configure Optimization Hub, make sure that all Enhanced Scheduling and Optimization requirements are met.

1. From the object management settings for optimization requests, go to Lightning Record Pages.
2. Select the Lightning record page that you want to add the Optimization Hub component to, and then click **Edit**.
3. In Lightning App Builder, drag the Optimization Hub component onto the canvas.
For an optimal view, use the Header and One Region template as the layout for Optimization Hub. See [Lightning Page Templates](#).
4. If Optimization Insights is configured and added to the layout, remove it from the canvas.
5. Save your work and activate the Lightning record page.

Limitations for Optimization Hub

All Enhanced Scheduling and Optimization limitations apply to Optimization Hub.

- You can use Optimization Hub regardless of the territory match criteria. However, the derived key performance indicators are calculated only for service resources who are primary or relocation members of the appointment's service territory.
- Optimization Hub is available only for global and in-day optimization requests.

SEE ALSO:

[Get Ready for Field Service Scheduling and Optimization](#)

[Enable Enhanced Scheduling and Optimization](#)

[Limits and Limitations for Enhanced Scheduling and Optimization](#)

[Activate Lightning Experience Record Pages](#)

Access Optimization Hub

View Optimization Hub to get a snapshot of different metrics before and after optimization and across multiple territories.



This is a Field Service managed package feature.



Note: Optimization Hub is available only when you're using Enhanced Scheduling and Optimization.

1. From the App Launcher, find and select **Optimization Request**.
2. On the Optimization Requests list view, click the optimization request record.
3. In Optimization Hub, click the filter icon to select the service territories that Optimization Hub shows information for.
4. To gather information related to the optimization request, navigate through the Optimization Hub tabs.

Optimization Hub includes four tabs that show information related to scheduling, service resources, and the scheduling policy.

USER PERMISSIONS

To configure Optimization Hub:

- Customize Application

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 Optimization Hub:

- Read on Field Service objects

- Home tab—Shows a high-level overview of the metrics trade-off and the key areas to focus on. It shows you a comparison of the metrics before and after optimization and how they impact each other. For example, improving the average response time can increase the average travel time for service appointments. It gives you a granular understanding of what happened after an optimization run and what areas of focus can be relevant to improve the scheduling results. You can filter the service territories that are included in the comparison.
- Schedule tab—Shows you a comparison of service appointments, travel times, and break-related metrics before and after optimization. For example, in the Total Travel Time card, the total time is broken down according to the travel time from the resource's home base, between appointments, and back to home base.
 -  **Note:** For maximum accuracy, travel time values are provided in seconds and are then rounded up, which is different from in the Gantt, where the time unit is minutes.
- Resources Tab—Includes cards that compare metrics related to service resource types, workloads, availability, and utilization before and after optimization. For example, the Utilization card shows you the service resources' actual work time out of their available work time, before and after optimization. You can filter which factors optimization considers when calculating a service resource's utilization. When all factors are considered, utilization is calculated using the following formula: (Scheduled Duration + Non-Availability + Lunch Breaks + Travel From Home Base + Travel Between Appointments + Travel To Home Base) ÷ (Overtime Availability + Normal Availability).
- Policy Tab—Shows you how optimization performed compared to your scheduling policy and service objectives. For example, the Service Objectives card shows you the service objectives of the scheduling policy.


SEE ALSO:

[View Field Service Resource Utilization](#)

Get Recommendations with Field Service Appointment Insights (Beta)

Learn how Appointment Insights helps to improve the scheduling of service appointments.

 *This is a Field Service managed package feature.*

 **Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

[Learn About Appointment Insights \(Beta\)](#)

Help users understand why a service appointment can't be scheduled, and which work rules are preventing its scheduling.

[Set Up Appointment Insights \(Beta\)](#)

Configure your Appointment Insights settings and assign user permissions.

[View Appointment Insights \(Beta\)](#)

Admins and dispatchers can view the work rules that limit the scheduling options of a service appointment and follow the recommended actions to relax those rules. They can also view potential time slots that can become available for scheduling.

EDITIONS

Available in: Lightning Experience

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

Learn About Appointment Insights (Beta)

Help users understand why a service appointment can't be scheduled, and which work rules are preventing its scheduling.

 *This is a Field Service managed package feature.*

Appointment Insights helps admins and dispatchers understand why a service appointment can't be scheduled, and what changes they can make to the scheduling policy's work rules in order to qualify time slots and candidates for scheduling.

Appointment Insights applies relaxation strategies that check what changes can be made to a scheduling policy. Based on the output, it suggests what changes to make to qualify additional time slots and candidates for scheduling.

By revealing the work rules that limit the scheduling options and following the recommended actions, admins and dispatchers can adjust the automatic scheduling and qualify more time slots and candidates for a certain service appointment.

Appointment Insights appears on a service appointment record. It shows the work rules that are preventing the scheduling of the service appointment and the recommended actions to relax those rules. It also shows potential time slots that can become available for scheduling.

The screenshot displays the 'Appointment Insights' section for a service appointment SA-0103. At the top, it shows the appointment details: Owner (User User), Account (00000053), Parent Record (00000053), Work Type (HVAC Installation), Status (None), and Arrival Window Start. The 'Appointment Insights' section is expanded, showing a 'Scheduling Policy' dropdown set to 'Customer First' with a 'Run' button. Below this, three rule violations are listed:

- Internal Employee:** Blocked slots: 21. What happened? We can't find available candidates because the Internal Employee work rule is preventing their scheduling. What can you do? If possible, remove this rule. Buttons: Show Slots, Open Rule.
- Match Skills:** Blocked slots: 21. What happened? We can't find available candidates with any of these required skills: HVAC Install. What can you do? Confirm the service appointment's required skills and your service resources' assigned skills. Buttons: Show Slots, Tell Me More.
- Match Territory:** Blocked slots: 21. What happened? We can't find available candidates within the Los Angeles service territory. What can you do? Replace this rule with Maximum Travel from Home. Set the distance to a 50 mile radius from the service appointment's location. Buttons: Show Slots, Tell Me More.

Below the violations is a 'Potential Slots' calendar grid for the week of March 17th to 23rd, 2022. The grid shows time slots for each day, with some slots marked as available (indicated by a blue dot) and others as blocked (indicated by a red dot).

Set Up Appointment Insights (Beta)

Configure your Appointment Insights settings and assign user permissions.

 This is a Field Service managed package feature.

[Requirements for Appointment Insights \(Beta\)](#)

Before you set up Appointment Insights, make sure that you meet these requirements.

[Limitations for Appointment Insights \(Beta\)](#)

Learn about the limitations of Appointment Insights.

[Assign User Permissions for Appointment Insights \(Beta\)](#)

Give users access to Appointment Insights.

[Configure Appointment Insights \(Beta\)](#)

Add the Appointment Insights Lightning web component to the service appointment record page.

EDITIONS

Available in: Lightning Experience

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

Requirements for Appointment Insights (Beta)

Before you set up Appointment Insights, make sure that you meet these requirements.

 *This is a Field Service managed package feature.*

- All Enhanced Scheduling and Optimization requirements are met.
- Enhanced Scheduling and Optimization is enabled.
- For Appointment Insights to evaluate scheduling options, make sure that your service appointments are associated with service territories.

SEE ALSO:

[Get Ready for Field Service Scheduling and Optimization](#)

[Enable Enhanced Scheduling and Optimization](#)

Limitations for Appointment Insights (Beta)

Learn about the limitations of Appointment Insights.

 *This is a Field Service managed package feature.*

All Enhanced Scheduling and Optimization limitations apply to Appointment Insights.

SEE ALSO:

[Limits and Limitations for Enhanced Scheduling and Optimization](#)

Assign User Permissions for Appointment Insights (Beta)

Give users access to Appointment Insights.

 *This is a Field Service managed package feature.*

[Assign](#) on page 36 users these permission sets.

- FSL Admin Permissions
- FSL Dispatcher Permissions

SEE ALSO:

[Manage Field Service Permissions](#)

[Create Field Service Permission Sets](#)

EDITIONS

Available in: Lightning Experience

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

EDITIONS

Available in: Lightning Experience


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

Configure Appointment Insights (Beta)

Add the Appointment Insights Lightning web component to the service appointment record page.

 *This is a Field Service managed package feature.*

1. From the object management settings for service appointments, go to Lightning Record Pages.
2. Select the Lightning record page that you want to add the Appointment Insights component to, and then click **Edit**.
3. In the Tabs component properties, [add a tab](#) and name it **Appointment Insights**.
4. To add the Appointment Insights component to a tab, in Lightning App Builder, select the tab on the canvas and then drop the component directly below it.

 **Tip:** We recommend adding an Appointment Insights tab as described in this step. However, you can also drag the component to any location on the Lightning record page.

5. Save your work and [activate](#) the Lightning record page.

View Appointment Insights (Beta)

Admins and dispatchers can view the work rules that limit the scheduling options of a service appointment and follow the recommended actions to relax those rules. They can also view potential time slots that can become available for scheduling.

 *This is a Field Service managed package feature.*

1. On the Service Appointment record, click the **Appointment Insights** tab.
Under Horizon, the dates show the time frame in which the service appointment must start and complete.
2. For Scheduling Policy, select a policy to check.
3. To view the information, click **Run**.

[View Work Rule Violations and Recommendations \(Beta\)](#)

Appointment Insights shows the work rules that are preventing the scheduling of a service appointment and the recommended actions to take to relax those rules and qualify more candidates for scheduling.

[View Potential Slots \(Beta\)](#)

Appointment Insights shows potential time slots within the service appointment's horizon dates that can become available for scheduling by making changes to your scheduling policy.

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 configure Appointment Insights:

- Customize Application

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 Appointment Insights:

- Read on Field Service objects

View Work Rule Violations and Recommendations (Beta)

Appointment Insights shows the work rules that are preventing the scheduling of a service appointment and the recommended actions to take to relax those rules and qualify more candidates for scheduling.

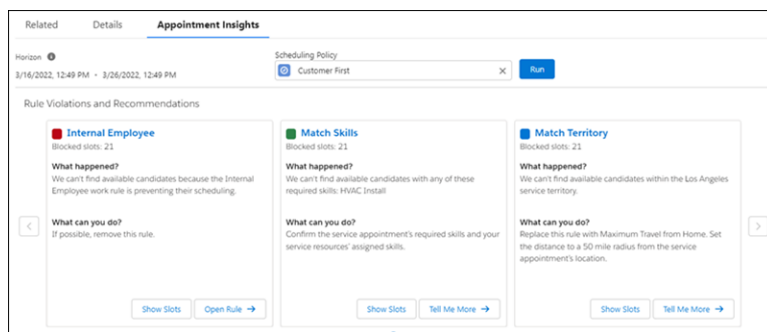


This is a Field Service managed package feature.

EDITIONS

Available in: Lightning Experience

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



Each work rule is displayed as a card with its own color. The card shows the number of blocked time slots, what happened, and what you can do.

Appointment Insights refers to the following work rules.

Work Rule	Rule Violation	Recommendation
Match Territory on page 149	A violation occurs when there are no available candidates who are Primary or Relocation members of the service appointment's service territory.	After Appointment Insights verifies that candidates in neighboring territories are available, remove the Match Territory work rule from your scheduling policy, and add the Maximum Travel from Home rule instead.
Maximum Travel from Home on page 151	A violation occurs when there are no available candidates whose home base is within the rule's defined distance or travel time to the service appointment's location.	Multiply the rule's defined distance or travel time by 1.5 to qualify more available candidates for scheduling.
Match Skills on page 148	A violation occurs when there are no available candidates who possess the required skills and skill level listed on the service appointment's parent Skill Requirement record.	Verify that the service appointment's parent Skill Requirement record lists the correct required skills and skill level, and ensure that your service resources' assigned skills and skill levels are up to date. If there are still no available candidates, train your service

Work Rule	Rule Violation	Recommendation
		resources to meet the required skills or skill level.
Match Boolean on page 146 Custom Rule	A violation occurs when there are no available candidates who meet the criteria of the Match Boolean custom work rule.	Verify that the Match Boolean custom rule is defined correctly. If possible, remove this rule.
Match Fields on page 147 Custom Rule	A violation occurs when there are no available candidates who meet the criteria of the Match Fields custom work rule.	Verify that the Match Fields custom rule is defined correctly. If possible, remove this rule.
Match Time Rule on page 149	A violation occurs when there are no available candidates who meet the criteria of the Match Time rule. For example: no candidates can complete the service appointment before the due date.	Verify that the standard match rule or other configuration is defined correctly. <ul style="list-style-type: none"> • 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.

Appointment Insights also provides other information and actions that you can take to qualify time slots and candidates for scheduling.

- To view time slots that can become available for scheduling if you relax a work rule, click **Show Slots**. The potential slots for that work rule are highlighted in the Potential Slots section.
- To open the work rule record, click **Open Rule**. From the work rule record, you can modify the work rule's settings to qualify more time slots for scheduling.
- To open a relevant help article, click **Tell Me More**. In some cases, you need to change the resource's territory membership, availability, skills, and more to qualify more time slots for scheduling. The articles explain how to make these changes and the impact they can have on the service appointment's scheduling.

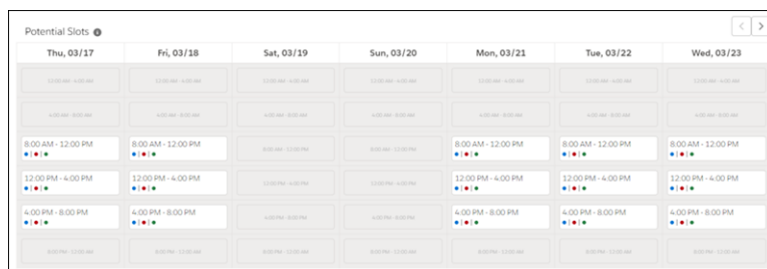
View Potential Slots (Beta)

Appointment Insights shows potential time slots within the service appointment's horizon dates that can become available for scheduling by making changes to your scheduling policy.

 This is a Field Service managed package feature.

Each time slot shows the corresponding color of the work rules that are preventing the scheduling of that time slot. This indicates which work rule you can relax to make the slot available for scheduling.

Hover over a time slot to see the work rules that are preventing the scheduling of the slot and the number of candidates that can become available when you relax the work rules.



EDITIONS

Available in: Lightning Experience

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

Work in the Field Service 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.

 This is a Field Service managed package feature.

To reach the dispatcher console, from the App Launcher, find and open the Field Service app, and then click the **Field Service** tab.

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 120 minutes, a message is displayed for you to reload the page to continue.

[Customize the Field Service 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.

[Working in the Field Service Dispatcher Console Appointment List](#)

Use the service appointment list on the left side of the Field Service dispatcher console to filter, sort, and search appointments within the list. You can also perform actions on selected appointments.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

[Work in the Field Service Dispatcher Console Gantt](#)

The Gantt is on the right side of the dispatcher console and contains the resource list, the schedule view, and additional features. User idle time is monitored to reduce unnecessary Gantt refreshes and improve computer performance. Stepped away from the dispatcher console? If you've been inactive the Gantt session times out, reload the page when you return to continue.

[Working in the Field Service 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.

SEE ALSO:

[Optimize Your Field Service Schedule](#)

[Trailhead: Dispatcher Console for Admins](#)

[Trailhead: Field Service Dispatcher Console for Dispatchers](#)

[Field Service Permission Set Licenses](#)

[Monitor Field Service Schedule Optimization Requests](#)

Customize the Field Service 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.

[Control Which Field Service 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 Field Service 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 in Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Create Custom Appointment Icons

Add custom icons to service appointments on the Field Service 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.

SEE ALSO:

[Add the Field Service Dispatcher Console to an Experience Builder Site](#)

[Trailhead: Supercharge Field Service](#)

[Working in the Field Service Dispatcher Console Appointment List](#)

[Work in the Field Service Dispatcher Console Gantt](#)

[Working in the Field Service Dispatcher Console Map](#)

Control Which Field Service 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.

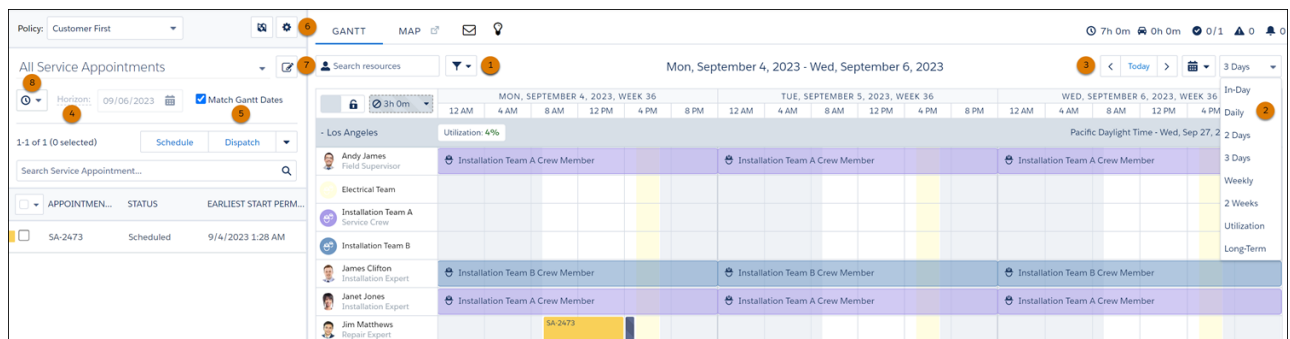
 This is a Field Service managed package feature.

Control the Time Frame

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



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 show the last day of the horizon shown on the Gantt.
- Standard list view filter (6): To apply a standard filter, click the gear icon and select **Dispatch Console Settings**. Under Scheduling Window Length, define the number of days shown 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.

Dispatch Console Settings

Filter Resources After Running 'Get Candidates'
Display only the service resources that are available for the service appointment Filter resources

Scheduling Window Length
Number of days shown before the selected scheduling horizon in the appointment list

Service Appointments Per Page
Set the maximum number of service appointments that appear on one page

Gantt Row Height
Set the height of a row in the Gantt

Filter by Duration Type
Display only capacity-based resources that have the selected duration type

Set Default Gantt View to Today Set view to today

Save

- Custom list view filter (7): To apply a custom filter, click the Manage Filters icon and select **New**. Under Date Selection, define the number of days shown before and after the horizon date. The horizon date and the custom filter settings control the appointment list time frame. 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.

Filter Editor

Details

Name

Description

Characters left: 255

Date Selection

Show appointments 3 days before the horizon date and 3 days past it

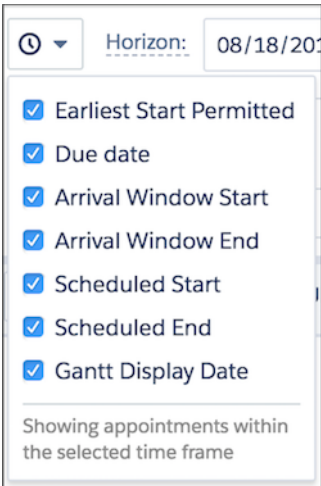
Show only appointments shown on the Gantt

Additional Criteria

Make this filter available for all users

Save

- Date field dropdown menu (8): The menu controls 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 want to see it on the Gantt every day as a reminder.

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 can get an error that the scheduling horizon is too long. To avoid this issue:

- 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).

 **Tip:** Using Salesforce's Platform automation capabilities, set up a process 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

SEE ALSO:

[Gantt Keyboard Shortcuts](#)

[Working in the Field Service Dispatcher Console Appointment List](#)

[Work in the Field Service Dispatcher Console Gantt](#)

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 Appointment*. 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.

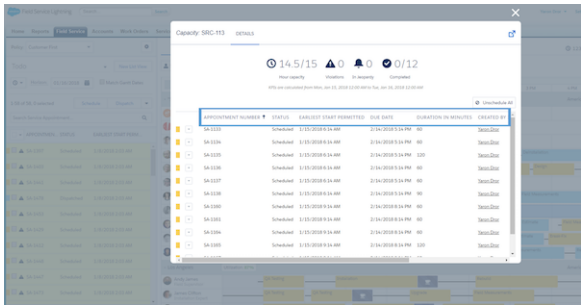
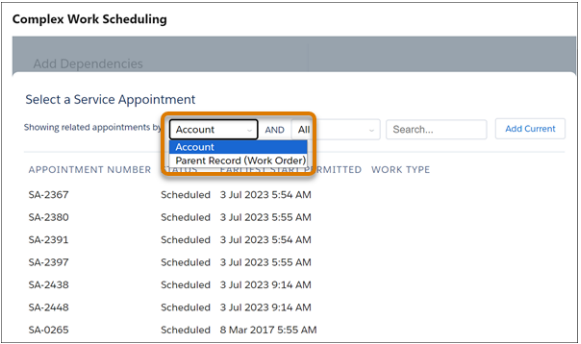
Only fields related to the object that you’re editing are shown in the dispatcher console. For example, if you’re editing the Service Appointment object, only service appointment fields are shown. Fields related to a service appointment’s account aren’t shown.

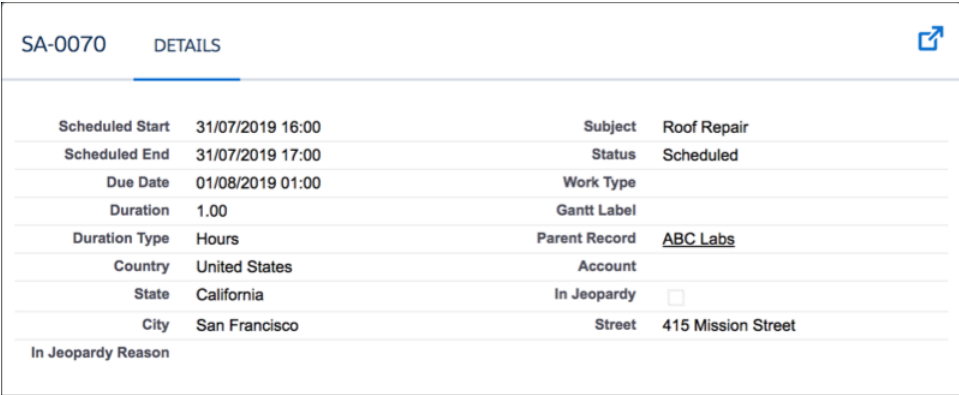

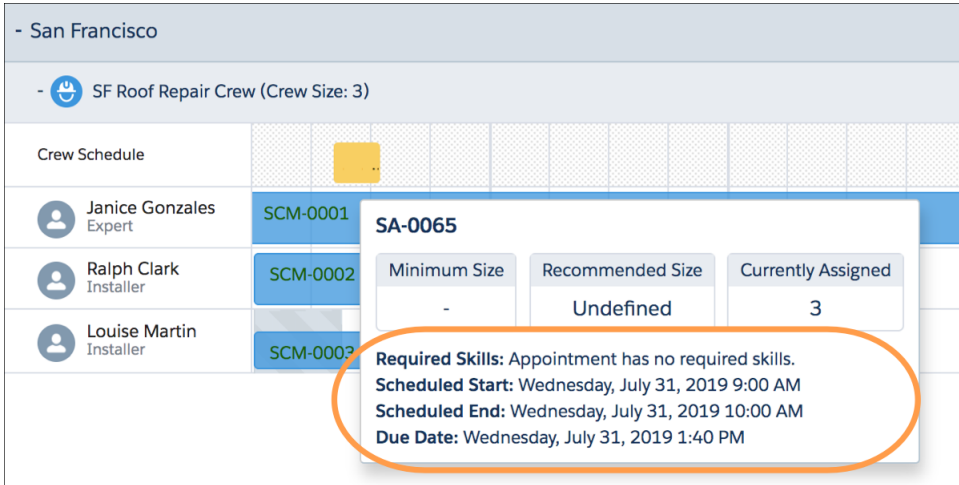
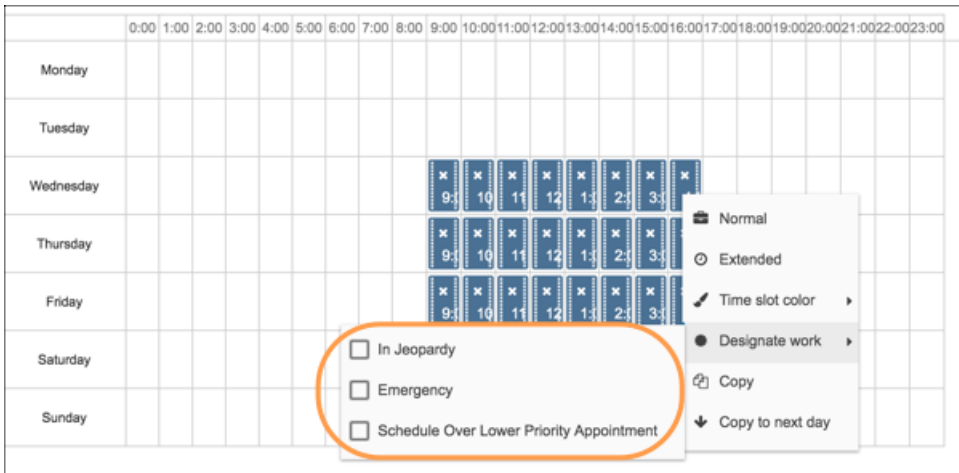
EDITIONS

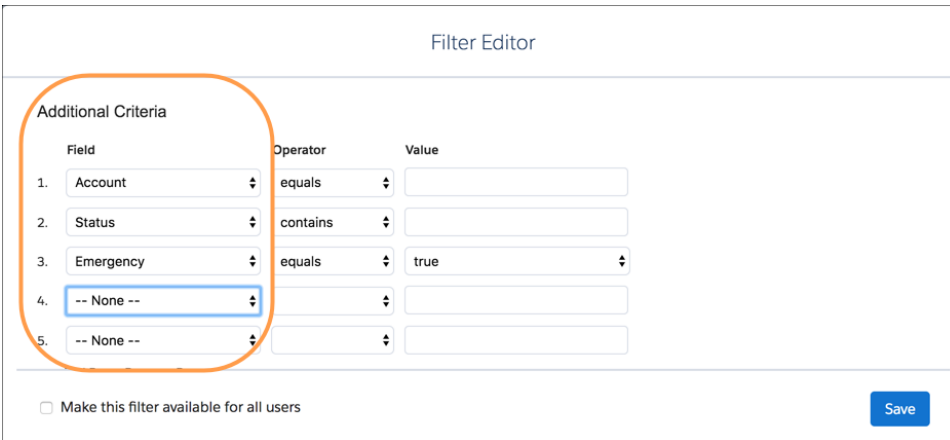
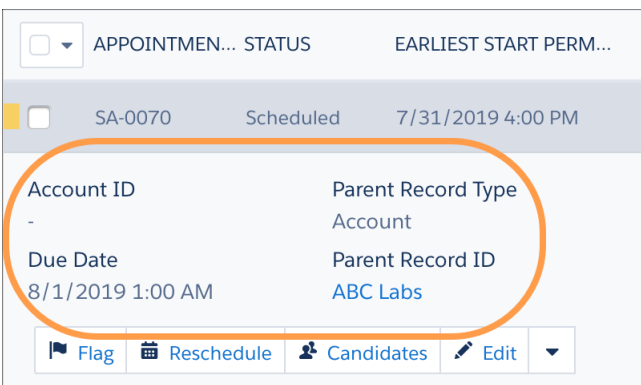
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience


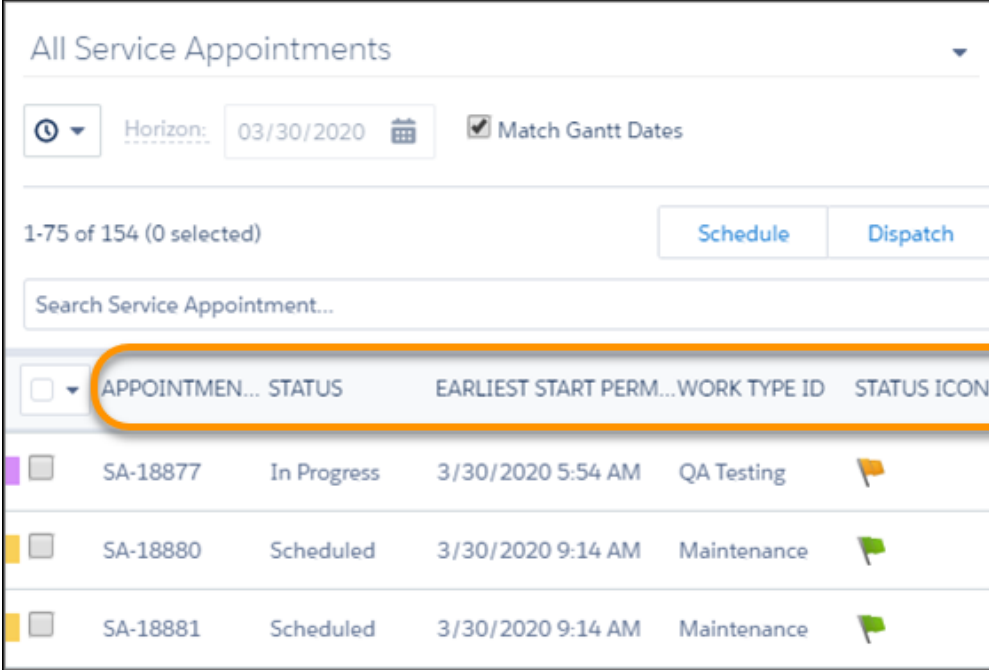
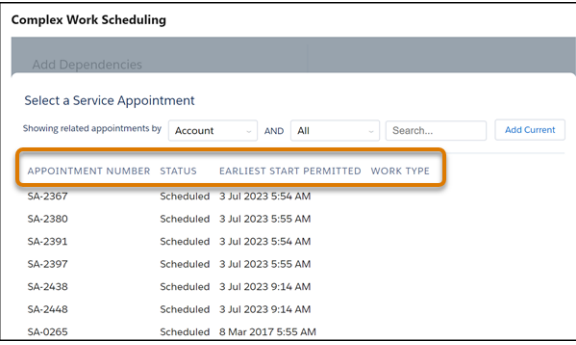
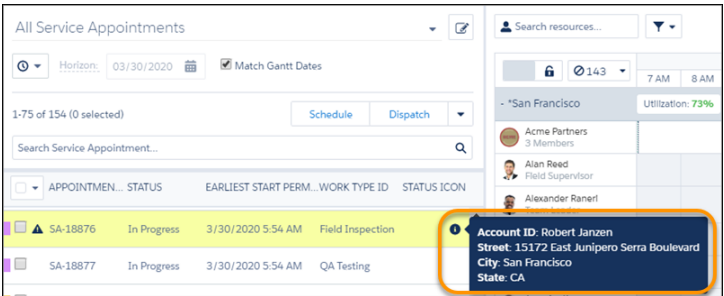
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

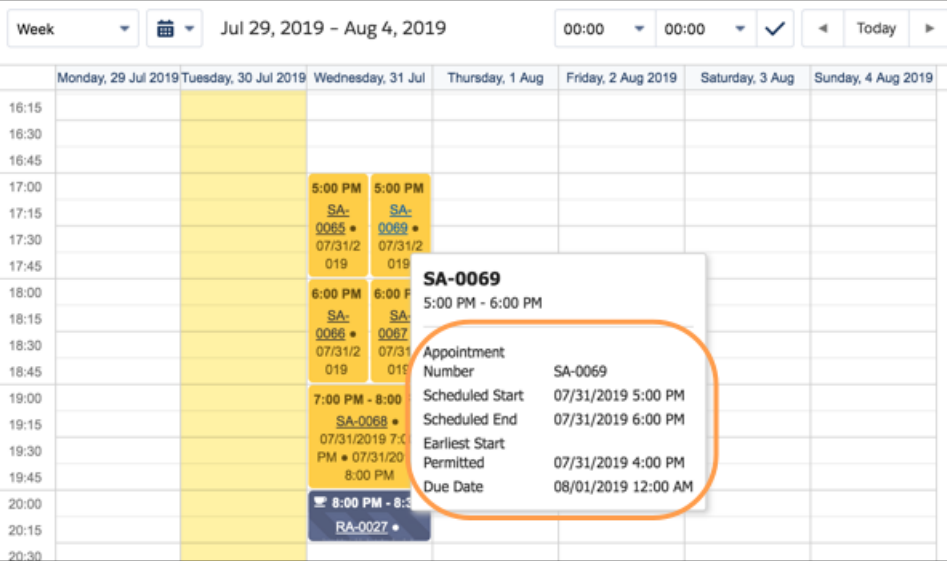
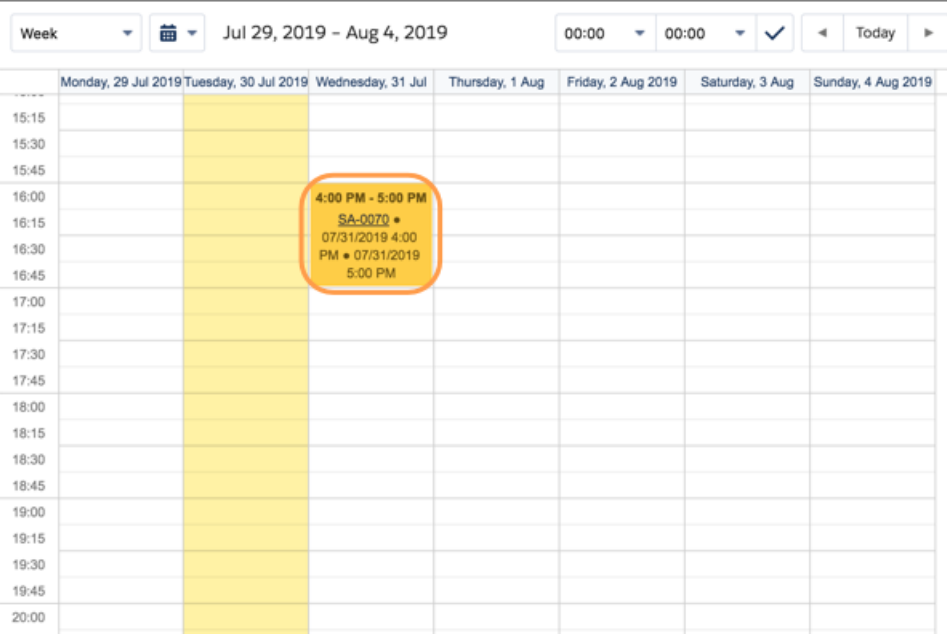
Service Appointment Field Sets

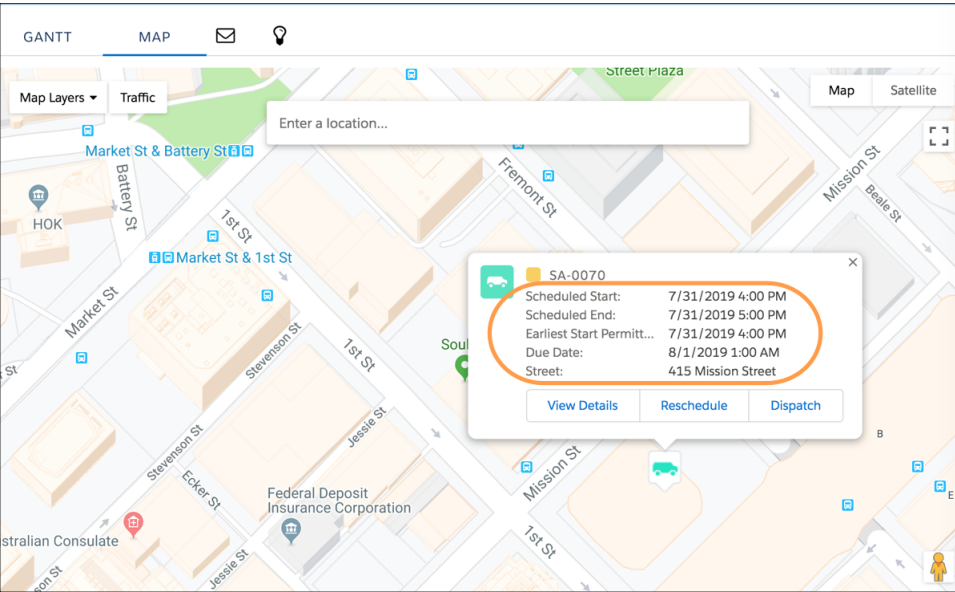
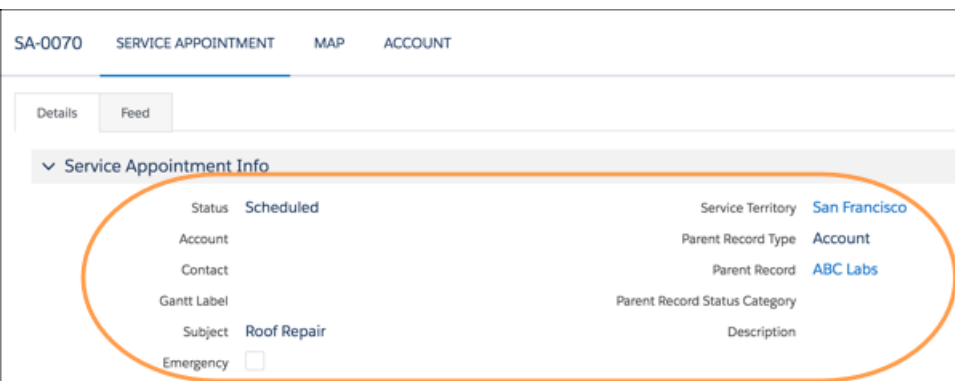
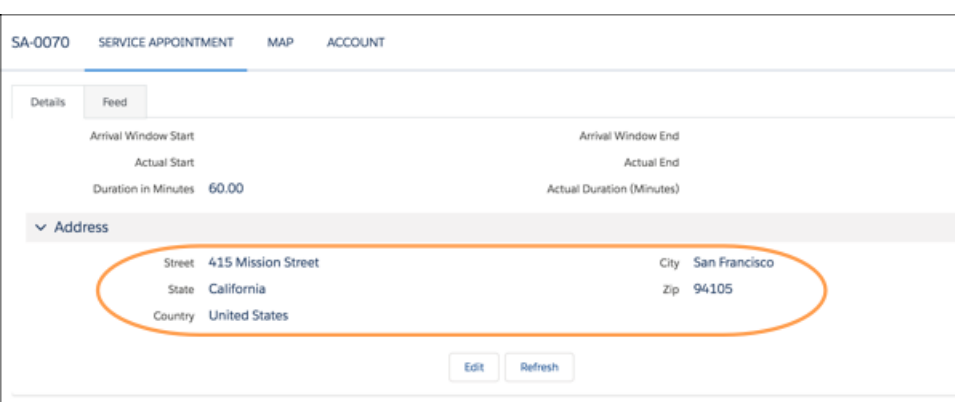
Field Set	Description	Location in Dispatcher Console
Capacity Service Columns	Controls the columns on the dialog screen shown when a user double-clicks a capacity record on the Gantt. This field set supports up to 9 fields.	
Complex Work Lookup Fields	Controls which lookup fields are available for selecting service appointments when users create dependencies.	
Crew Management	Controls which fields are shown when a user	

Field Set	Description	Location in Dispatcher Console
	<p>double-clicks a service appointment from the Crew Schedule row in the Crew Management Gantt.</p>	
<p>Crew Management Tooltip</p>	<p>Controls which fields are shown when a user hovers over an appointment in the Crew Management Gantt.</p> <p> Note: Lookup fields and fields without values aren't displayed. The Required Skills field is always shown.</p>	
<p>Designated Work Fields</p>	<p>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.</p>	

Field Set	Description	Location in Dispatcher Console
Gantt Filter	Controls the Additional Criteria fields shown when creating a custom Gantt filter.	
Service Appointment Expanded	Controls the mini layout displayed when the user clicks an appointment in the appointment list. The mini layout supports up to 12 fields.	

Field Set	Description	Location in Dispatcher Console
<p>Service Appointment List Columns</p>	<p>Controls the fields that appear as columns in the appointment list and in the complex work dependencies lookup filter. We recommend that the appointment list includes up to six columns. Additional columns are supported but can affect the performance of the dispatcher console. The number of columns shown depends on the screen resolution. You can include Gantt or custom icon fields in columns.</p> <p> Note: Custom appointment list filters include appointment list column settings. If such a filter is applied, it overrides this field set.</p>	 
<p>Service Appointment List Preview</p>	<p>Controls the fields that appear when a user hovers on the appointment information icon.</p>	

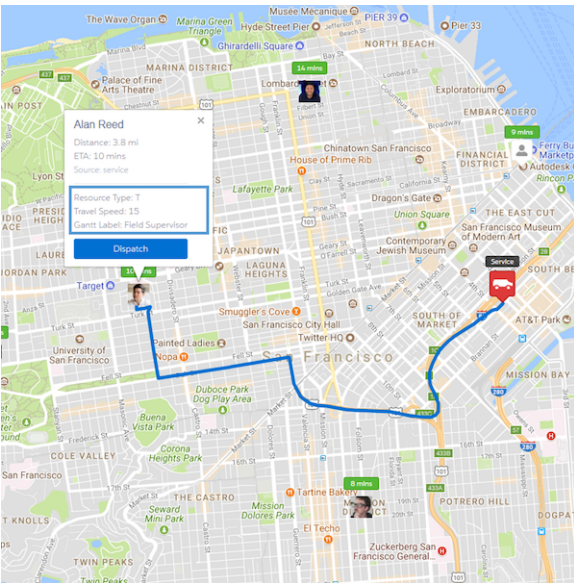
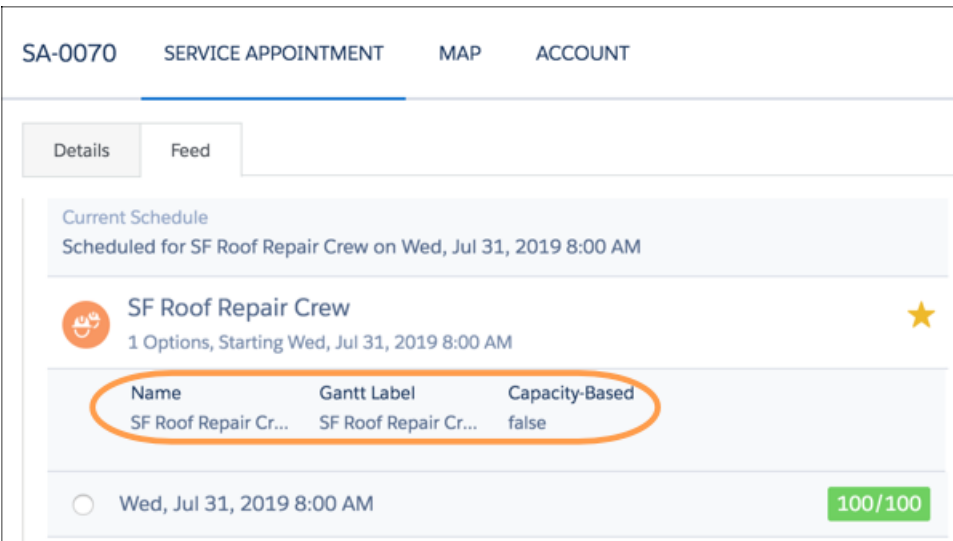
Field Set	Description	Location in Dispatcher Console
<p>Service Appointment Resource Calendar Tooltip</p>	<p>Controls the fields displayed on the tooltip when a user hovers over an appointment on the service resource.</p>	
<p>Service Appt Resource Calendar Display</p>	<p>Controls the fields displayed on appointments on the service resource calendar Visualforce page.</p>	

Field Set	Description	Location in Dispatcher Console
Service Info Window Map	Controls the layout of the dialog screen displayed when the user double-clicks an appointment on the map.	 <p>The screenshot shows a map interface with a popup for service appointment SA-0070. The popup is titled 'SA-0070' and contains the following information:</p> <ul style="list-style-type: none"> Scheduled Start: 7/31/2019 4:00 PM Scheduled End: 7/31/2019 5:00 PM Earliest Start Permitt...: 7/31/2019 4:00 PM Due Date: 8/1/2019 1:00 AM Street: 415 Mission Street <p>At the bottom of the popup are three buttons: 'View Details', 'Reschedule', and 'Dispatch'.</p>
Service Lightbox	Controls the layout of the dialog screen displayed when the user double-clicks an appointment on the Gantt.	 <p>The screenshot shows the 'Service Appointment Info' section in the Gantt view. The information is as follows:</p> <ul style="list-style-type: none"> Status: Scheduled Service Territory: San Francisco Account: [blank] Parent Record Type: Account Contact: [blank] Parent Record: ABC Labs Gantt Label: [blank] Parent Record Status Category: [blank] Subject: Roof Repair Description: [blank] Emergency: <input type="checkbox"/>
Service Lightbox Address	Controls which fields are displayed under Address when a user double-clicks a service appointment in the Gantt.	 <p>The screenshot shows the 'Address' section in the Gantt view. The information is as follows:</p> <ul style="list-style-type: none"> Street: 415 Mission Street City: San Francisco State: California Zip: 94105 Country: United States <p>At the bottom of the section are 'Edit' and 'Refresh' buttons.</p>

Field Set	Description	Location in Dispatcher Console
Service Lightbox Time	Controls which fields are displayed under Date & Time when a user double-clicks a service appointment in the Gantt.	
Service Tooltip Gantt	Controls the tooltip layout shown when hovering over an appointment on the Gantt. This field set supports up to 10 fields.	

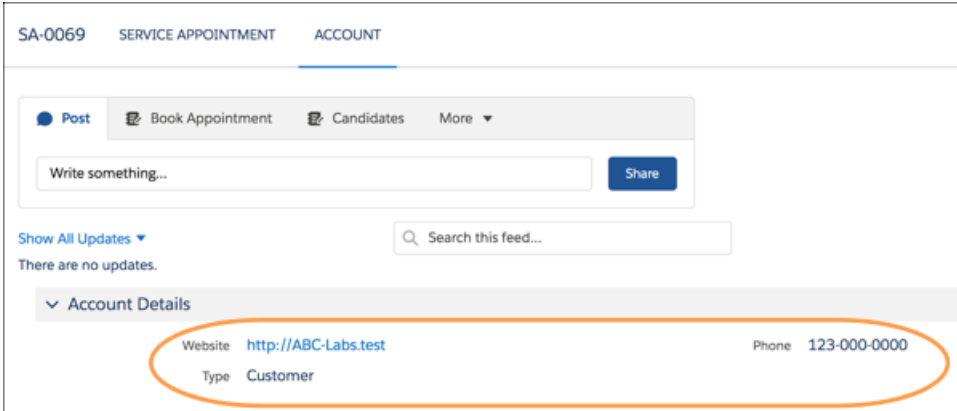
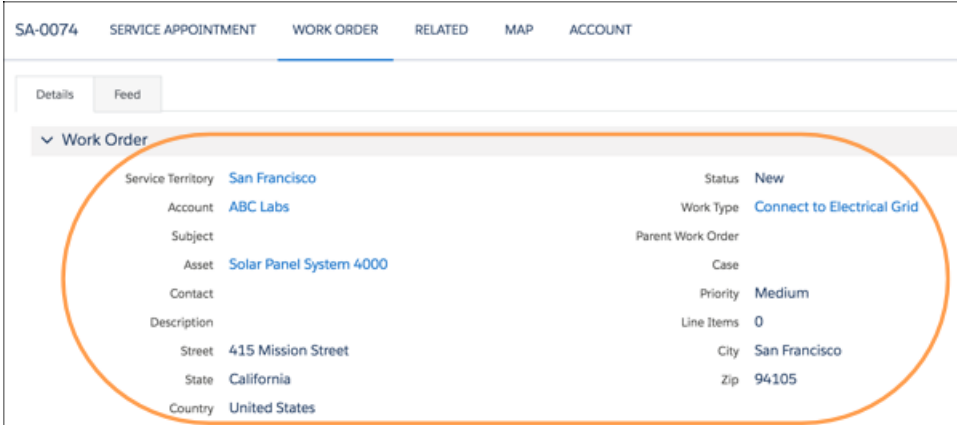
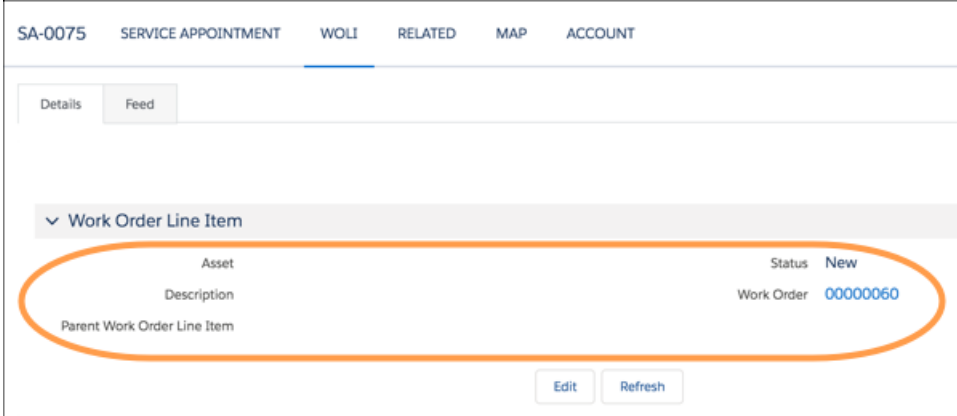
Service Resource Field Sets

Field Set	Description	Placement in Dispatcher Console
Crew Management Resource Lightbox	Controls the fields shown when a user double-clicks a service resource in the Crew Management Gantt.	

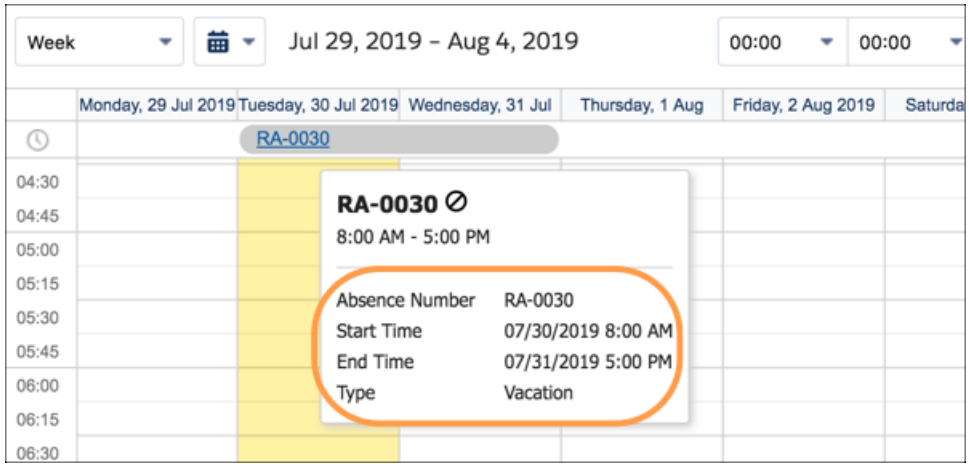
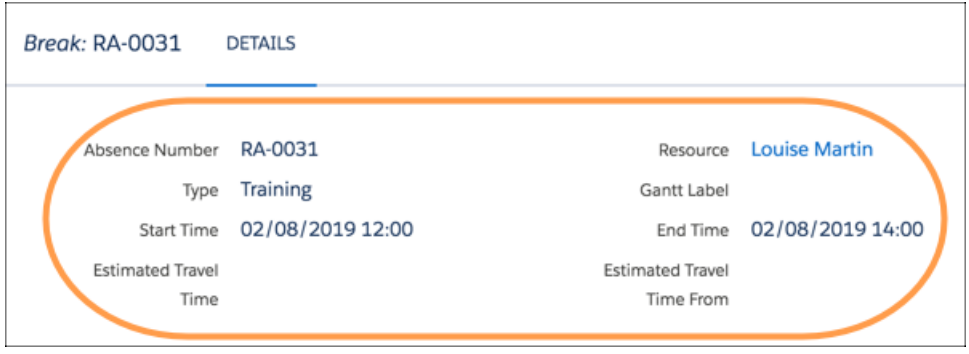
Field Set	Description	Placement in Dispatcher Console						
Emergency Fields	Controls the fields displayed for a service resource in the Emergency Chatter action.	 <p>The image shows a map of San Francisco with a blue route highlighted. A resource card for Alan Reed is overlaid on the map, displaying the following information: Distance: 3.8 mi, ETA: 10 mins, Source: service, Resource Type: T, Travel Speed: 15, and Gantt Label: Field Supervisor. A 'Dispatch' button is visible at the bottom of the card.</p>						
Get Candidates Resource Details	Controls the fields shown when expanding a resource row on the Candidates Chatter action.	 <p>The screenshot shows the Dispatcher Console interface for a service appointment. The appointment ID is SA-0070. The current schedule is for SF Roof Repair Crew on Wed, Jul 31, 2019 at 8:00 AM. The resource details table is as follows:</p> <table border="1" data-bbox="662 1226 1273 1327"> <thead> <tr> <th>Name</th> <th>Gantt Label</th> <th>Capacity-Based</th> </tr> </thead> <tbody> <tr> <td>SF Roof Repair Cr...</td> <td>SF Roof Repair Cr...</td> <td>false</td> </tr> </tbody> </table> <p>Below the table, there is a radio button for the appointment date and time: Wed, Jul 31, 2019 8:00 AM, with a capacity indicator of 100/100.</p>	Name	Gantt Label	Capacity-Based	SF Roof Repair Cr...	SF Roof Repair Cr...	false
Name	Gantt Label	Capacity-Based						
SF Roof Repair Cr...	SF Roof Repair Cr...	false						

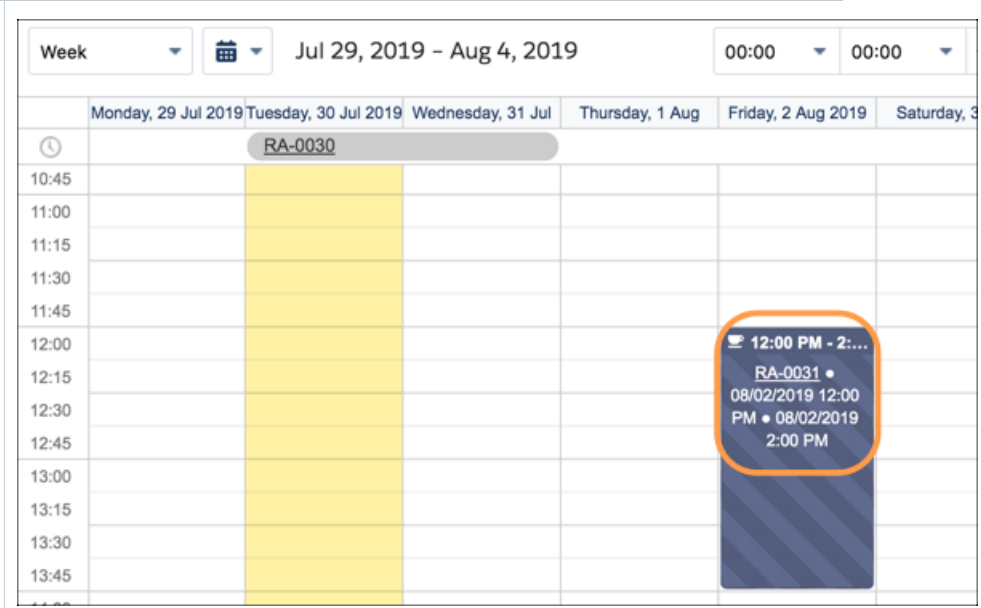
Field Set	Description	Placement in Dispatcher Console
<p>Resource Gantt Filter</p> <p>Controls the available fields in Gantt Resource Filters. The fields are shown in these sections:</p> <ul style="list-style-type: none"> • <i>Sort by</i> • Checkbox filters (if the field is of type Checkbox) • <i>One of the following properties</i> picklist (if the field is of type Picklist) 		
<p>Resource Lightbox</p> <p>Controls the layout of the dialog screen displayed when the user double-clicks a service resource in the Gantt.</p>		

Gantt Lightbox

Field Set	Description	Placement in Dispatcher Console
Account	Controls the layout of the dialog screen displayed when a user double-clicks an appointment on the Gantt and clicks the Account tab.	
Work Order	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.	
Work Order Line Item	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.	

Resource Absence Field Sets

Field Set	Description	Placement in Dispatcher Console
Resource Absence Calendar Tooltip	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.	 <p>The screenshot shows a calendar view for the week of July 29, 2019, to August 4, 2019. A yellow bar on Tuesday, July 30, 2019, represents an absence. A tooltip is displayed over this bar, showing the following details:</p> <ul style="list-style-type: none"> RA-0030 (with a close icon) 8:00 AM - 5:00 PM Absence Number: RA-0030 Start Time: 07/30/2019 8:00 AM End Time: 07/31/2019 5:00 PM Type: Vacation
Resource Absence Lightbox	Controls the layout of the dialog screen displayed when a user double-clicks a resource absence on the Gantt.	 <p>The screenshot shows a lightbox titled "Break: RA-0031" with a "DETAILS" tab. The details are as follows:</p> <ul style="list-style-type: none"> Absence Number: RA-0031 Type: Training Start Time: 02/08/2019 12:00 Resource: Louise Martin End Time: 02/08/2019 14:00 Estimated Travel Time: (fields are present but empty)

Field Set	Description	Placement in Dispatcher Console
Resource Absence Resource Calendar	Controls the fields displayed on absences on the service resource calendar Visualforce page.	

SEE ALSO:

[Color-Code the Gantt](#)

[Color-Code the Gantt](#)

[Create Custom Appointment Icons](#)

Create Custom Actions for the Field Service 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To define, edit, delete, set security, set version settings, and run tests for Apex classes:

- Author Apex

To create and edit Visualforce pages:

- Customize Application

To create custom permissions:

- Manage Custom Permissions

To add custom actions to the dispatcher console:

- FSL Admin permission set

Create Custom Appointment List Filters

USER PERMISSIONS

To configure the Field Service managed package:	Customize Application
To assign a permission set license:	Manage Users
To create a permission set:	Manage Profiles and Permission Sets
To create, edit, and delete custom filters:	Field Service Dispatcher or Field Service Admin custom permission sets AND Create Filter custom permission
To share personal custom filters and edit and hide public custom filters:	Field Service Dispatcher or Field Service Admin custom permission sets AND Create Filter custom permission AND Publish Filter custom permission

EDITIONS


Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


Create custom filters in Field Service 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 **Manage Filters** icon and select **New**.
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. Only standard and custom service appointment fields, including picklists, are supported on the service appointment object, picklist values of other objects aren't 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 edit a selected filter, click the **Manage Filters** icon and select **Edit**.

13. To hide a public custom filter, click the **Manage Filters** icon 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.

SEE ALSO:

[Filter the Gantt in Field Service](#)

[Filter the Field Service Gantt by Service Territory](#)

Create Custom Appointment Icons


Add custom icons to service appointments on the Field Service 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.)

Gantt Icon
<http://icons.iconarchive.com/icons/ridessnow/u-r-what-u-eat/96/ice-cream-icon.png>

 Sean Richards	 SA-4562	
 Sophie Hunter Senior Engineer	SA...	

SEE ALSO:

[Customize the Dispatcher Console with Field Sets](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 a custom Gantt icon: One of the following:

- Custom permission set: FSL Admin Permissions
- Custom permission set: FSL Dispatcher Permissions
- Read and Edit on service appointments

Working in the Field Service Dispatcher Console Appointment List

Use the service appointment list on the left side of the Field Service dispatcher console to filter, sort, and search appointments within the list. You can also 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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

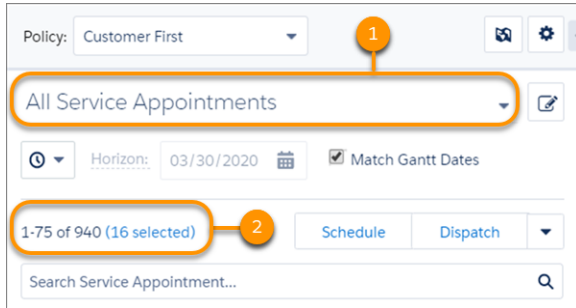
These service appointment fields are scanned in searches:

- 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 appear 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. The custom permissions assigned to the user determine the visibility of each filter. When the filtering criteria are based on Status, 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.

Filter Name	Definition
All Service Appointments	All service appointments.
Canceled	Service appointments whose status category is Canceled.
Contractors	Service appointments that are scheduled to capacity-based resources.
Crews	Service appointments whose parent work order or work order line item has the Minimum Crew Size field set.
Exclude Bundle Members	Service appointments that represent a bundle or aren't part of a bundle.
Flagged	Service appointments that the user marked as flagged. Flags aren't saved when the dispatcher console is reloaded.
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.
In Jeopardy	Service appointments that are marked In Jeopardy and aren't canceled.
Recently Used	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. Recent service appointments aren't saved when the dispatcher console is reloaded.
Rules Violating	Service appointments that have rule violations and aren't canceled.
Scheduled	Service appointments with an assigned resource.
Selected	Service appointments that the user selected in the appointment list. Selections aren't saved when the dispatcher console is reloaded.

Filter Name	Definition
To Do	Service appointments that are awaiting an action from the dispatcher. It includes appointments that match one of these criteria. <ul style="list-style-type: none"> The status category is None. The appointment has rule violations. The appointment is In Jeopardy and isn't Canceled or Completed.
Unscheduled	Service appointments that don't have an assigned resource and aren't 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:

Action	Definition
Schedule	Execute an automatic scheduling process for the selected appointments.
Dispatch	Dispatch the selected appointments.
Flag / Unflag	Add or remove a flag for the selected appointments. You can use the flag for filtering later.
Check Rules	Initiate a rule validation check for the selected appointments.
Unschedule	Unschedule the selected appointments, or define the relevant time range and service territories of the appointments that must be unscheduled.
Optimize	Optimize the selected appointments. You're given the option to select a scheduling policy and filter the selected appointments before running the optimization.

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:

Color-Coding Setting	Definition
Default	Apply a white background to appointments in the list
Full Shading	Apply a flat background color
Horizontal Gradient	Apply a gradient background color

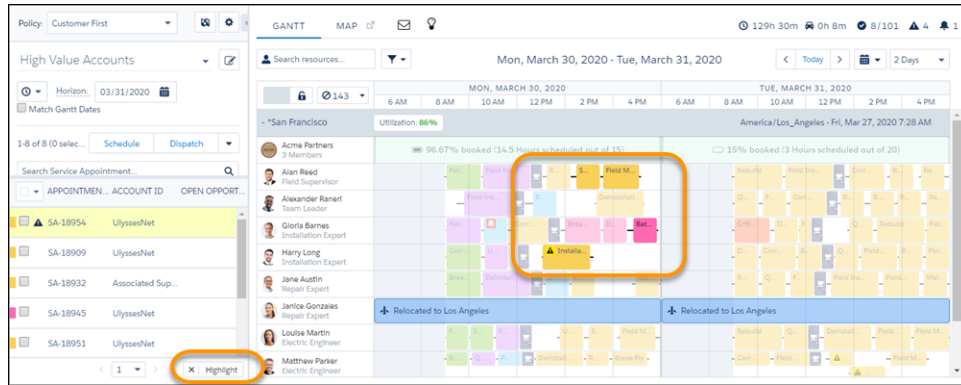


Note:

- 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.



SEE ALSO:

- [Schedule Appointments from the Dispatcher Console](#)
- [Customize the Field Service Dispatcher Console](#)
- [Control Which Field Service Appointments Appear in the Dispatcher Console](#)
- [How are Status Categories Used?](#)

Work in the Field Service Dispatcher Console Gantt

The Gantt is on the right side of the dispatcher console and contains the resource list, the schedule view, and additional features. User idle time is monitored to reduce unnecessary Gantt refreshes and improve computer performance. Stepped away from the dispatcher console? If you've been inactive the Gantt session times out, reload the page when you return to continue.

 *This is a Field Service managed package feature.*

[Filter the Gantt in Field Service](#)

Customize the Gantt's contents by filtering it based on service resource settings, skills, utilization, hours, and other features.

[Filter the Field Service 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 Field Service dispatcher console.

[View Field Service 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 Field Service dispatcher console Gantt and map 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

[Work with Resource Absences](#)

To make it easier for you to work with resource absences, create and edit resource absences directly on the Gantt, view overlapping absences scheduled to the same resource, 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 Field Service 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 Field Service Gantt Live Updates](#)

Choose to have the Gantt auto-refresh so that dispatchers don't have to rely on timed updates. Gantt Live Updates relies on the Salesforce Streaming API.

SEE ALSO:

[Add the Field Service Dispatcher Console to an Experience Builder Site](#)

[Customize the Field Service Dispatcher Console](#)

[Control Which Field Service Appointments Appear in the Dispatcher Console](#)

Filter the Gantt in Field Service

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.

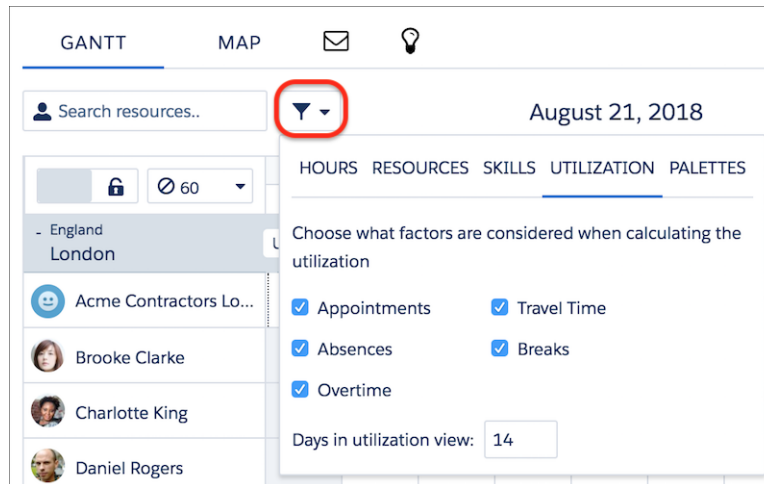
To open your filter settings, click the filter icon in the top left-hand corner of the Gantt. By default, the Gantt is sorted by service resource name.

To search for resources within the resource list, enter two or more characters in the search field. Separate multiple keywords with a comma, which applies an OR condition to the search.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



Filter Tab	Description
Hours	<p>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 within filtered hours. For In-Day, the Gantt shows half-hour intervals and ignores the filter for which hours to show.</p> <p>In 3 Days, Weekly, and 2 Weeks date resolutions, you can turn on the option to show a horizontal scrollbar. Scrolling enables you to see all the relevant resource availability information also in lower date resolutions.</p> <p>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.</p> <p>A setting in Field Service Settings > Dispatcher Console UI lets you configure Sunday or Monday as the start of the week.</p> <p>At the bottom of the tab, you can customize the Long-Term view:</p> <ul style="list-style-type: none"> • 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 <p>(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.)</p>
Resources	<p>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 available to be assigned to appointments on the dates shown on the Gantt. To add more filterable fields to the Resources tab, update the Resource Gantt Filter field set.</p>
Skills	<p>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.</p> <p>When the Gantt's resource skill filter runs, it preloads 50 skills and shows them as filter options based on the available skills of the currently loaded resources. You can search for more skills using the skills search bar and apply them as filter options.</p>

Filter Tab	Description
	The last applied filter is saved until the next time you change it.
Utilization	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.)
Palettes	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.

SEE ALSO:

[Create Custom Appointment List Filters](#)

[View Field Service Resource Utilization](#)

[Color-Code the Gantt](#)

[Gantt Keyboard Shortcuts](#)

Filter the Field Service 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!

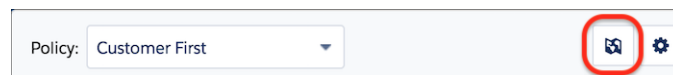
 *This is a Field Service managed package feature.*

To filter the Gantt by service territory, click the territory filtering icon at the top of the appointment list.

EDITIONS


Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



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.

SEE ALSO:

[Create Custom Appointment List Filters](#)

[Create and Manage Map Polygons](#)

Gantt Keyboard Shortcuts

Use keyboard shortcuts to work faster in the Field Service dispatcher console.

Command	Description	Keyboard Shortcut
Flag or unflag a service appointment	Flagged appointments appear with a flag icon on the Gantt.	Select service appointment, then F
Open parent work order or work order line item record	Opens the record in the Work Orders tab, outside of the Gantt.	Select service appointment, then W
Open service appointment record	Opens the record in the Service Appointments tab, outside of the Gantt.	Select service appointment, then S
Open service appointment details	Opens a lightbox over the Gantt with tabs containing details about the appointment and its parent record, related records, map, and more.	Select service appointment, then Enter

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Command	Description	Keyboard Shortcut
Close service appointment lightbox	Closes the lightbox.	Esc
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

Command	Description	Keyboard Shortcut
Scroll down in schedule	Scrolls down one row in the Gantt without changing the dates shown.	Down Arrow

SEE ALSO:

[Filter the Gantt in Field Service](#)

[Color-Code the Gantt](#)

[Control Which Field Service Appointments Appear in the Dispatcher Console](#)

View Field Service 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: $(Service\ Appointments + Absences + Breaks + Travel\ Time) / (Overtime\ Hours + *Normal\ Hours*)$

- 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%.

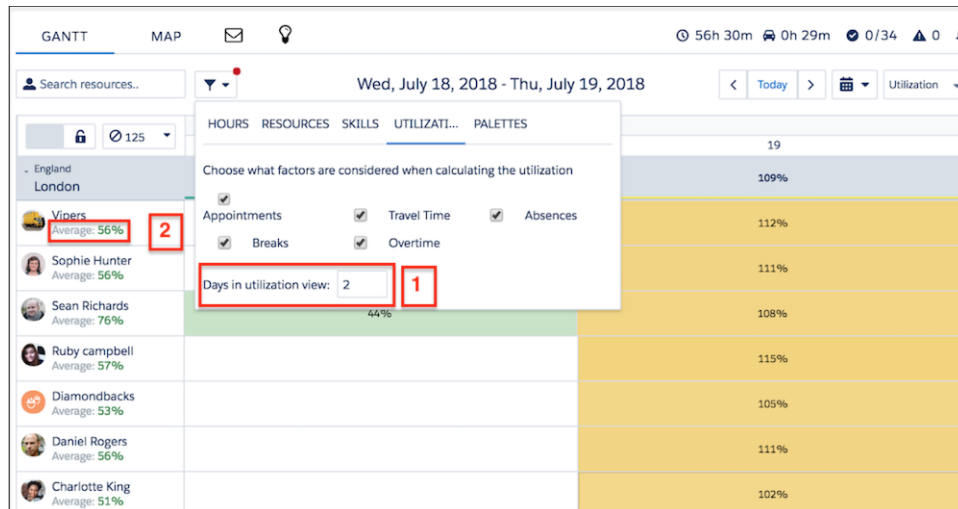
View Utilization on the Gantt

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.

EDITIONS


Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



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:

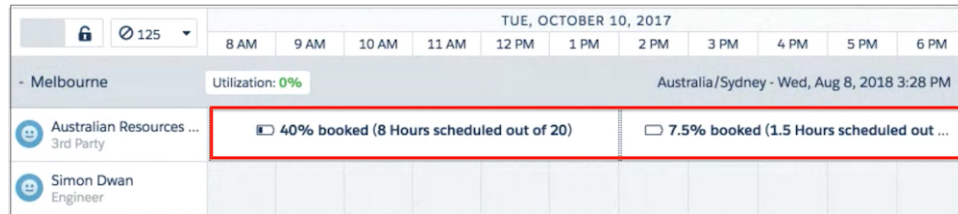
- Resources whose schedules are below Medium Utilization appear in green.
- Resources whose schedules are between High and Medium Utilization appear in yellow.
- Resources whose schedules are above High Utilization appear in red.
- Resources whose percentage of travel is larger than the value you specify 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.



SEE ALSO:

[Filter the Gantt in Field Service](#)

[Fill Schedule Gaps in Field Service](#)

[Set Custom Permissions for Field Service](#)

Color-Code the Gantt

Help dispatchers compare service appointments in the Field Service dispatcher console Gantt and map 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. 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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, edit, and delete Gantt palettes:

- Gantt Palettes Edit custom permission

To view the Palettes tab in the Gantt and apply a palette:


- Gantt Palettes View custom permission

- a. Select a palette in the dropdown list, and click **Apply Palette**. The list shows up to 10 active palettes in the org in alphabetical order. 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

SEE ALSO:

[Customize the Dispatcher Console with Field Sets](#)

[Filter the Gantt in Field Service](#)

[Gantt Keyboard Shortcuts](#)

[Customize the Dispatcher Console with Field Sets](#)

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.*

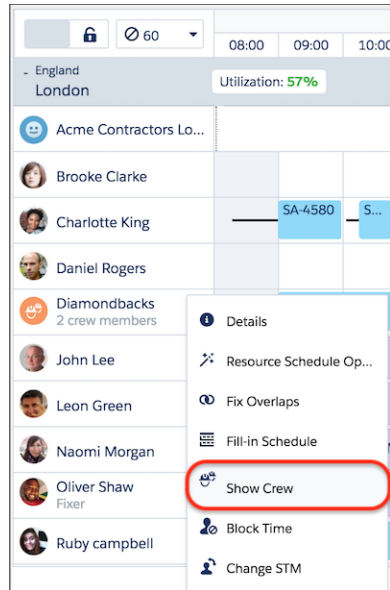
Show One Crew

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

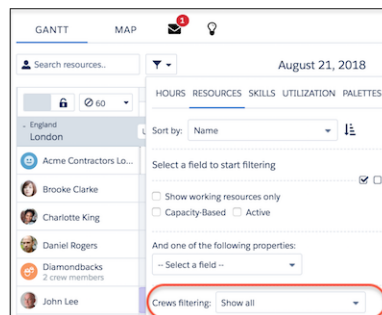
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.



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.

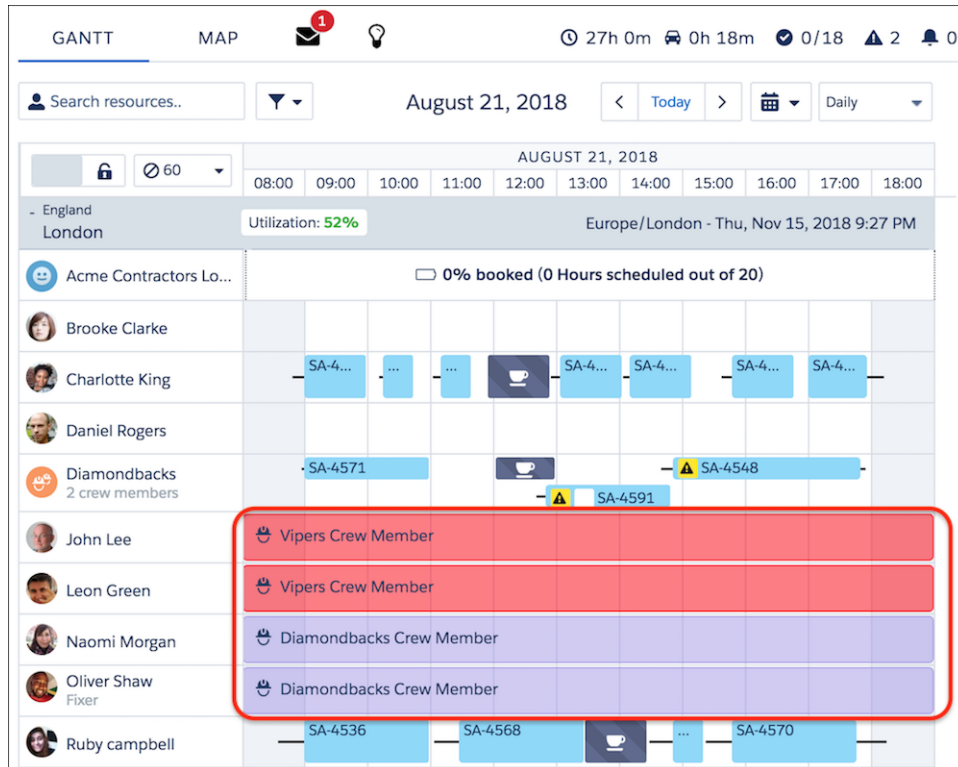


- **Show all:** Do not filter based on crew properties.
- **Hide Service Crew Members:** Show only service resources of type Crew and service resources of type Technician who are not allocated to crews in the time frame open on the Gantt.
- **Show Crews and their Service Crew Members:** Show only service 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.



SEE ALSO:

- [Create Service Crews](#)
- [Considerations for Scheduling Service Crews](#)
- [Considerations for Scheduling Service Crews](#)
- [Create Service Crews](#)
- [Service Crew Fields](#)
- [Set Up Crew Management](#)
- [Manage Field Service Crew Membership](#)
- [Manage Field Service Crew Membership](#)
- [Set Up Crew Management](#)

Work with Resource Absences

To make it easier for you to work with resource absences, create and edit resource absences directly on the Gantt, view overlapping absences scheduled to the same resource, hide unapproved absences on the Gantt and show resource absences on the dispatcher console map.

 This is a Field Service managed package feature.

[Add Resource Absences on the Gantt](#)

Create resource absences for service resources on the Gantt.

[Edit Resource Absences on the Gantt](#)

Modify resource absences for service resources on the Gantt with one or more of these options.

[View Overlapping Resource Absences on the Gantt](#)

Define the height of overlapping resource absences shown on the Gantt to easily identify resource absences.

[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.

[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.

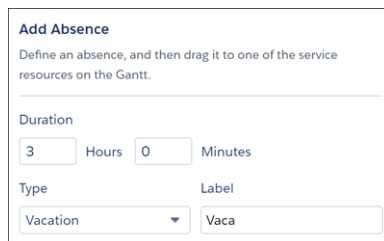
SEE ALSO:

[Create Service Resource Absences for Field Service](#)

Add Resource Absences on the Gantt

Create resource absences for service resources on the Gantt.

1. Click the absence creator icon on the Gantt and enter the absence details.
2. Drag the absence to one of the service resources on the Gantt.



Add Absence
Define an absence, and then drag it to one of the service resources on the Gantt.

Duration
3 Hours 0 Minutes

Type Label
Vacation Vaca

Edit Resource Absences on the Gantt

Modify resource absences for service resources on the Gantt with one or more of these options.

1. Double-click a resource absence on the Gantt and then click **Edit** in the Details window to modify its details.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 create resource absences on the Gantt:

- Create Absences from Gantt custom permission

To edit the duration of a resource absence on the Gantt:

- Gantt - Enable Adjusting Duration custom permission

NA: RA-1722 DETAILS

Absence Number: RA-1722
 Type: Medical
 Start Time: 7/3/2023, 4:00 PM
 Estimated Travel Time: 0

Resource: Alan Reed
 Gantt Label:
 End Time: 7/3/2023, 5:28 PM
 Estimated Travel Time: 0
 From:

[Edit](#) [Refresh](#)
[Edit](#) [Refresh](#)

2. Drag a resource absence on the Gantt from one service resource to another to reassign the absence.
3. Right-click a resource absence on the Gantt and select **Adjust Duration** to extend or shorten its duration.

View Overlapping Resource Absences on the Gantt

Define the height of overlapping resource absences shown on the Gantt to easily identify resource absences.

1. Click **Dispatch Console Settings**.
2. Select the height in **Absence Overlap Height**.

Dispatch Console Settings

Gantt Row Height
 Set the height of a row in the Gantt: Medium

Filter by Duration Type
 Display only capacity-based resources that have the selected duration type: Daily

Set Default Gantt View to Today
 Display the Gantt starting from today's date. By default, it shows the last visited date. Set view to today

Default Sidebar View
 Choose what appears in the sidebar when the dispatcher console loads: Appointment List

Appointment List Color-Coding
 Customize the background shading of appointments in the list: Default

Absence Overlap Height
 Set the height of overlapping resource absences on the Gantt: Partial

[Save](#)

If you select **Partial**, the overlapping absences appear one on top of the other. If you select **Full**, only one absence is visible and additional absences are hidden behind it.

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.

1. Create an approval process for absences that checks the FSL__Approved__c field.
2. To avoid confusion, approve all existing absences.
3. From the App Launcher, find and open the **Field Service Admin** app, and then click the **Field Service Settings** tab.

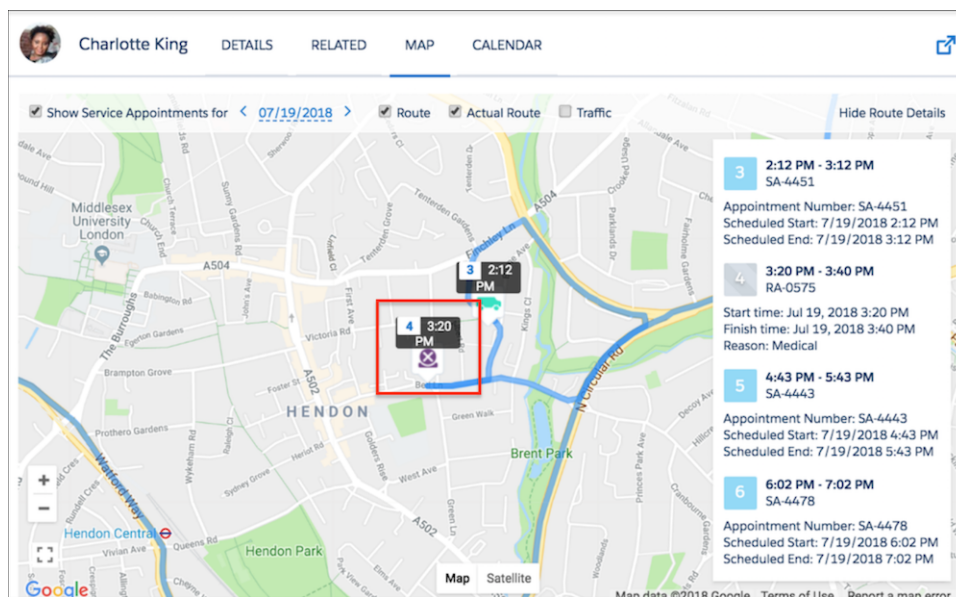
- Click **Scheduling** > **General Logic** and select **Activate approval confirmation on resource absences**.
- Save your changes.

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.

- From the App Launcher, find and open the **Field Service Admin** app, and then click the **Field Service Settings** tab.
- Click **Dispatcher Console UI** > **Gantt Configurations** and select **Show absences on resource map**.
- Save your changes.



SEE ALSO:

- [Create Service Resource Absences for Field Service](#)
- [View a Field Service Resource's Calendar](#)
- [Work Rule Type: Service Resource Availability](#)
- [Service Resource Fields for Field Service](#)

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.

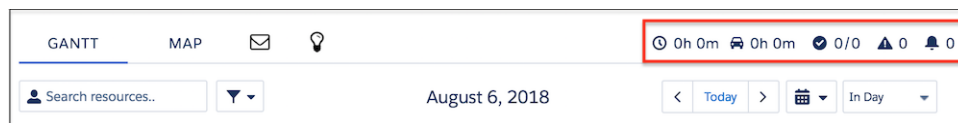
 *This is a Field Service managed package feature.*

The KPI bar includes five indicators and can be found in the top-right corner of the Gantt.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



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 Field Service 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.

EDITIONS

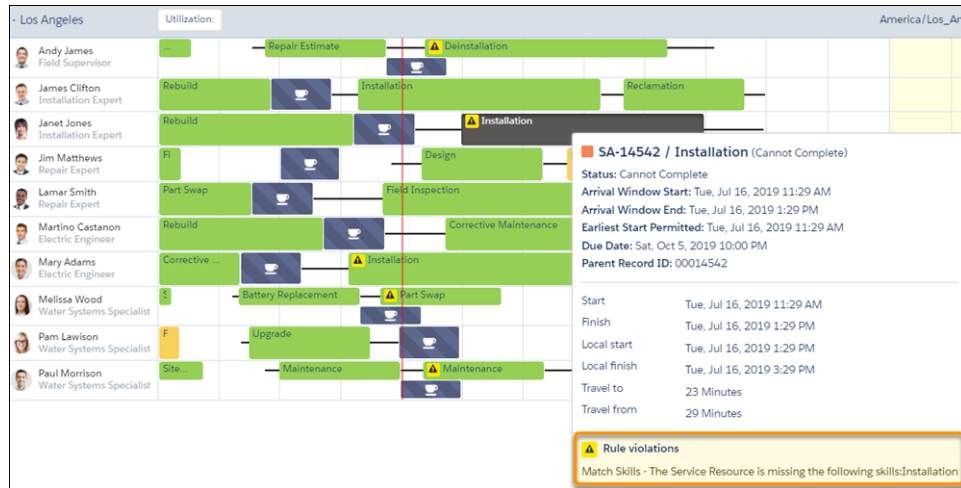
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To enable dispatchers to check rules manually:

- Custom permission sets:
 - Field Service Dispatcher Permissions
 - Field Service Dispatcher License
- Custom permissions:
 - Enable Check Rules - All Services
 - Gantt and List - Enable Check Rules
 - Gantt and List - Enable Bulk Check Rule



When optimizing your team's or a service resource's schedule, appointments with rule violations remain pinned. With Enhanced Scheduling and Optimization, the optimization engine tries to fix rule violations to improve the schedule by rescheduling or unscheduling rule violating appointments. To keep these appointments scheduled as is on the Gantt, the service appointments must first be pinned or in a pinned status.

- ✔ **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.


SEE ALSO:

- [Set Custom Permissions for Field Service](#)
- [Manage Rule Validation Checks](#)

Turn On Field Service Gantt Live Updates

Choose to have the Gantt auto-refresh so that 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](#).
 - If the service appointments were recently updated, field values on service appointments that appear on the Gantt also get their latest value. Because formula fields don't trigger updates to the record, formula fields never trigger the push updates to that service appointment.
1. Update sharing settings so that 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.

You can use timed updates instead of live updates to set the Gantt's refresh frequency. On the same Updating the Gantt page, under Timed Updates, enter the number of seconds between Gantt refreshes. The minimum frequency is 10 seconds.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 view live updates on the Gantt:

- Streaming API custom permission

Working in the Field Service 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.*

[Customize the Field Service Dispatcher Console 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.

[Enable Map Polygons in Field Service](#)

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 Field Service 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.

SEE ALSO:

[Customize the Field Service Dispatcher Console](#)

[View a Field Service Resource's Daily Travel Route](#)

[Set Up Routing for Travel Time Calculations](#)

Customize the Field Service Dispatcher Console 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.*

EDITIONS

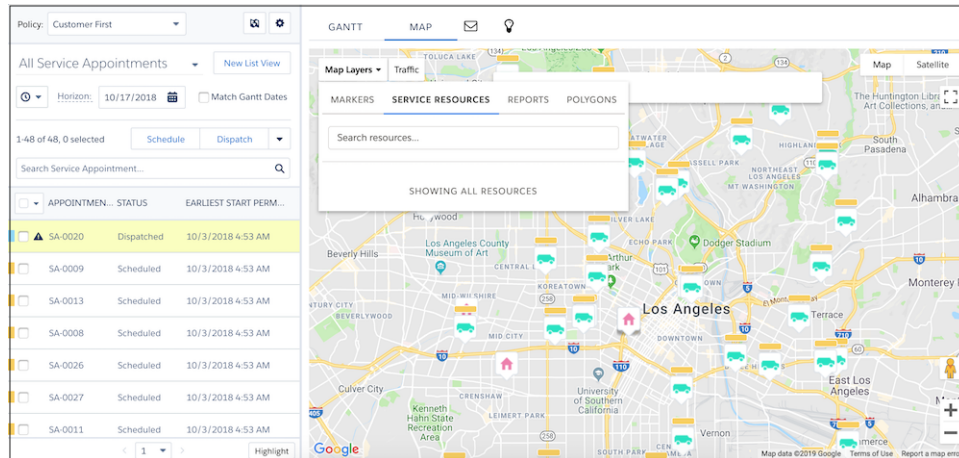
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



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 can 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.

By default, the map center is Los Angeles. This default can't be changed.

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.

SEE ALSO:

[Customize Icons and Colors for Reports](#)

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: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

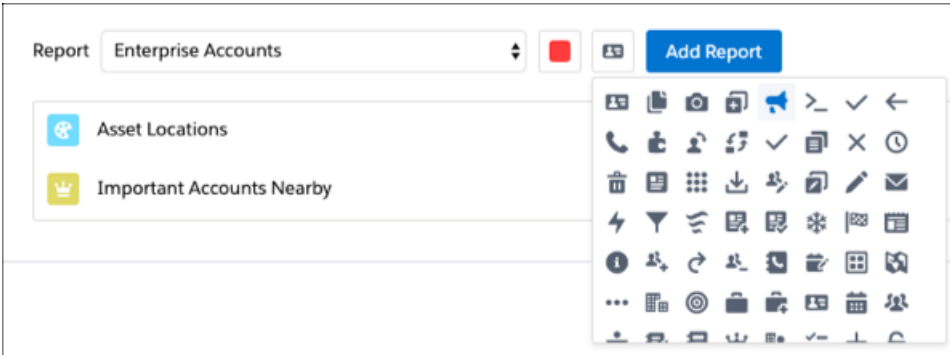
USER PERMISSIONS

To configure the Field Service managed package:

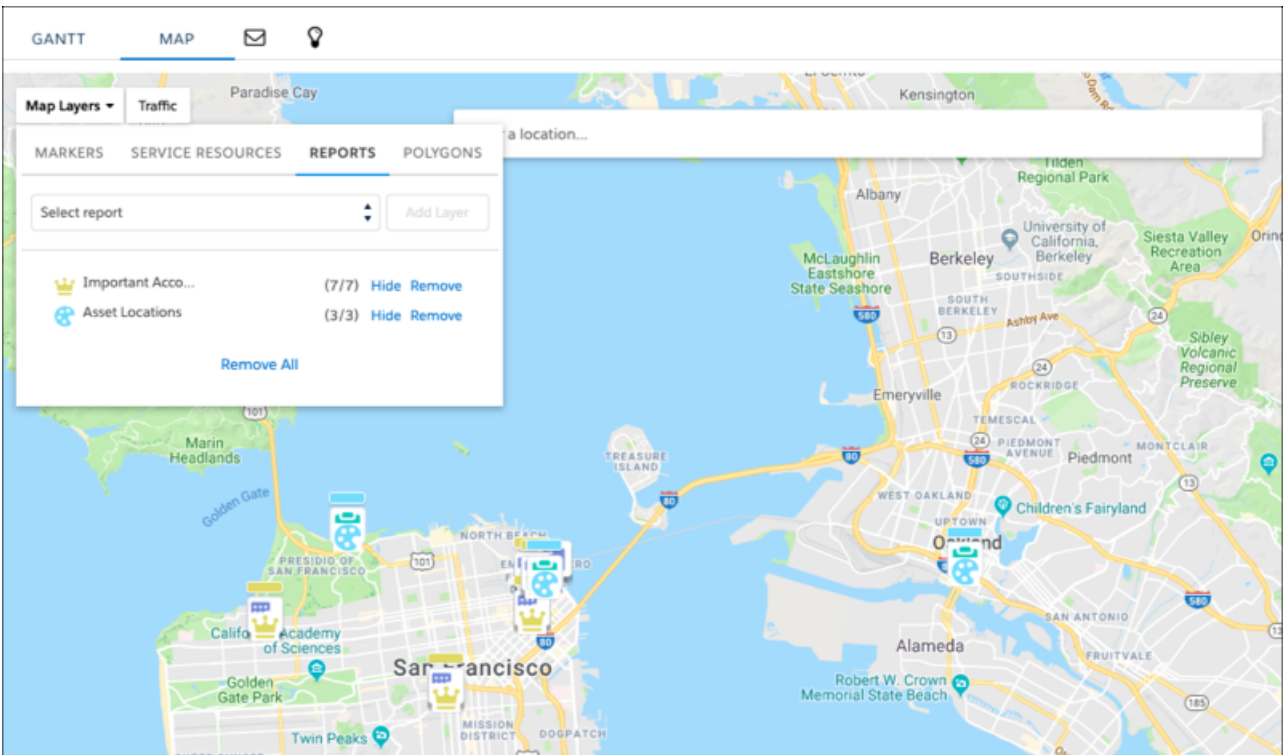
- Customize Application

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.


SEE ALSO:

[Customize the Field Service Dispatcher Console Map](#)

Enable Map Polygons in Field Service

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 Field Service 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**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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 then 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: To add to the actions list on polygons, create custom actions. For details, see [Create Custom Actions for the Field Service 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.
- When updating polygons, you can move a polygon to a different location on the map or adjust its vertices to change the polygon's shape. You can't delete individual vertices. Instead, you must delete the entire polygon and create another one.

SEE ALSO:

[Filter the Field Service Gantt by Service Territory](#)

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 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>
```


EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

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.

[Appointment Bundle Aggregation Duration Downscale Fields](#)

Appointment Bundle Aggregation Duration Downscals have the following fields.

[Appointment Bundle Aggregation Policy Fields](#)

Appointment Bundle Aggregation Policies have the following fields.

[Appointment Bundle Config Fields](#)

Appointment Bundle Configs have the following fields.

[Appointment Bundle Policy Fields](#)

Appointment Bundle Policies have the following fields.

[Appointment Bundle Policy Service Territory Fields](#)

Appointment Bundle Policy Service Territories have the following fields.

[Appointment Bundle Propagation Policy Fields](#)

Appointment Bundle Propagation Policies have the following fields.

[Appointment Bundle Restriction Policy Fields](#)

Appointment Bundle Restriction Policies have the following fields.

[Appointment Bundle Sort Policy Fields](#)

Appointment Bundle Sort Policies have the following fields.

[Asset Downtime Period Fields](#)

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

[Expense Fields for Field Service](#)

Expenses let your service resources track costs and associate them to work orders.

[Job Profile Fields for Field Service](#)

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

[Linked Article Fields](#)

A linked article is a Knowledge article that is attached to a work order, 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

[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 these fields. Some fields aren't 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.

[Product Service Campaign Fields](#)

Product service campaigns and product service campaigns 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 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.

[Recordset Filter Criteria Fields](#)

Recordset filter criteria and recordset filter criteria rules have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Serialized Products and Serialized Products Transactions Fields](#)

Review the Serialized Products and Serialized Products Transactions 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 these fields. Sometimes certain fields aren't 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 these fields. Sometimes fields aren't 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.

[Shift Pattern Fields](#)

Shift patterns and shift pattern entries have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Shift Template Fields](#)

Shift templates 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.

[Travel Mode Fields](#)

Travel Modes have the following fields.

[Warranty Fields](#)

Warranty terms, product warranty terms, and asset warranties have the following fields. Your page layout and field-level security settings can hide some fields and prevent you from editing others.

[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.

SEE ALSO:

[Set Up Field Service](#)

[Field Service Developer Guide](#)

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

Object Name	Definition	Tab in Salesforce?
Address	An address associated with a location.	
App Extension	A link between the Field Service mobile app and other mobile apps.	
Appointment Bundle Aggregation Duration Downscale	Sums the duration of the bundle members, reduced by a predefined percentage.	
Appointment Bundle Aggregation Policy	Policy that defines how the property values of the bundle members are aggregated and assigned to the bundle.	
Appointment Bundle Config	General parameters that define the behavior of the bundle.	✓
Appointment Bundle Policy	Policy that defines how the bundling of service appointments is handled.	✓
Appointment Bundle Policy Service Territory	A link between the Bundle Policy and the Service Territory.	
Appointment Bundle Propagation Policy	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.	
Appointment Bundle Restriction Policy	Policy that defines the restrictions that are considered while forming a bundle.	
Appointment Bundle Sort Policy	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.	
Assigned Resource	A service resource that is assigned to a service appointment.	
Associated Location	A location linked to a specific account.	

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Object Name	Definition	Tab in Salesforce?
Asset Downtime Period	A downtime period associated with an asset.	
Asset Warranty	A warranty term associated with an asset.	
Digital Signature	A captured signature from a field service customer or mobile worker.	
Expense	An expense such as tools or travel costs linked to a work order.	
Expense Report	A report that summarizes expenses.	
Expense Report Entry	An expense that's included in an expense report.	
Field Service Mobile Settings	A collection of settings related to the Field Service mobile app.	
Job Profile	A set of skills used to match service resources to shifts.	✓
Linked Article	A knowledge article version that is attached to a work order, work order line item, or work type.	
Location	A warehouse, site, van, or plant, usually where inventory is stored or used.	✓
Maintenance Asset	An asset associated with a particular maintenance plan. The plan's work orders list the asset associated with it.	
Maintenance Plan	A plan for preventive maintenance on assets. Work orders are generated for all maintenance visits.	✓
Maintenance Work Rule	A reoccurring maintenance item.	
Mobile Settings Assignment	The assignment of a field service mobile settings configuration to a user profile.	
Operating Hours	Field service hours that you can define for service territories, service territory members, and accounts.	✓
Product Consumed	A product from your inventory that was used to complete a work order or work order line item.	
Product Item	A portion of your inventory stored at a particular location. Every product item is linked to a product and a location.	✓
Product Item Transaction	Represents the restocking, consumption, or stock adjustment of a product item.	
Product Request	A request for inventory.	✓
Product Request Line Item	A subdivision of a product request, associated with a particular product.	✓
Product Required	A product that is required for the completion of a work order or work order line item.	
Product Service Campaign	A set of activities to be performed on a product service campaign asset, such as a product recall for safety issues or product defects.	✓
Product Service Campaign Item	A product service campaign's asset.	

Object Name	Definition	Tab in Salesforce?
Product Transfer	The transfer of inventory from one location to another.	✓
Product Warranty	A warranty term associated with a product.	
Recordset Filter Criteria	A filter that uses field values from a source object to filter records in another object.	✓
Recordset Filter Criteria Rule	The individual rules that make up a recordset filter criteria. Rules map fields to values.	
Resource Absence	A time period in which a service resource is unavailable to work.	
Resource Preference	The designation of a service resource as preferred, required, or excluded on specific accounts or work orders.	
Return Order	The return or repair of inventory or products.	✓
Return Order Line Item	A subdivision of a return order.	
Service Appointment	An appointment to perform field service work for customers.	✓
Service Appointment Status	Corresponds to the Status field on service appointments.	
Service Crew	A group of service resources that can be assigned to field service work as a unit.	✓
Service Crew Member	A service resource that belongs to a service crew.	✓
Service Report	A customer-facing report summarizing the status of a service appointment, work order, or work order line item.	
Service Report Template	A template for service reports.	
Service Resource	A user or crew who can perform field service work. You can assign service resources to service appointments and specify each resource's skills, service territory, and availability.	✓
Service Resource Capacity	The maximum number of scheduled hours or number of service appointments that a capacity-based service resource can complete within a specific time period.	
Service Resource Skill	A skill assigned to a service resource. You can specify skill level and expiration.	
Service Territory	A region in which field service work is performed. You can assign service resources to territories and create territory hierarchies.	✓
Service Territory Location	A location associated with a particular service territory.	
Service Territory Member	A service resource who is assigned to a particular service territory.	
Shift	A record used to schedule service resources.	✓
Shift Pattern	A pattern of shift templates used to define groups of commonly used shifts.	✓

Object Name	Definition	Tab in Salesforce?
Shift Pattern Entry	Shift pattern entries link shift templates to a shift pattern.	
Shift Template	A template used to define commonly used shifts.	✓
Shipment	A shipment of inventory between locations.	✓
Shipment Item	An item included in a shipment.	
Skill	A certification or area of expertise.	
Skill Requirement	A skill that is required to complete a particular field service task. Skill requirements can be added to work types, work orders, and work order line items.	
Time Sheet	A log of a service resource's time and attendance.	✓
Time Sheet Entry	A period when a service resource performs a specific function.	
Time Slot	A period in a day when field service work can be performed. Operating hours consist of one or more time slots.	
Warranty Term	Details of the benefits offered under a warranty.	
Work Order	Represents work to be performed for a customer.	✓
Work Order Line Item	A subtask on a work order.	
Work Order Status	Corresponds to the Status field on work orders.	
Work Order Line Item Status	Corresponds to the Status field on work order line items.	
Work Type	A template that helps you standardize your work orders.	✓
Work Type Group	A category of work types that's used to define work-type-based scheduling limits.	✓
Work Type Group Member	A work type that belongs to a particular work type group.	

The following objects are available even if Field Service isn't enabled. These objects are often used in field service tasks.

Object Name	Definition	Tab in Salesforce?
Asset	A purchased or installed product.	✓
Asset Relationship	A relationship between two assets that represents a replacement or upgrade.	
Contract Line Item	A subdivision of a service contract, typically representing a product covered by the service contract.	
Entitlement	Represents the level of support that a customer is entitled to.	✓
Product	A product or service that your business sells.	✓

Object Name	Definition	Tab in Salesforce?
Service Contract	Represents a service-level agreement, such as a warranty or subscription.	✓
Skill	A capability required to perform tasks.	✓
Work Order	A record that tracks work to be performed for customers. Work orders can have their own service appointments and work order line items.	✓
Work Order Line Item	A subdivision of a work order, often representing a task to be completed.	

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.

Object Name	Definition
Appointment Dependency	A scheduling dependency between two service appointments.
Crew Management User Settings	A user's crew management preferences.
Crew Management User Settings Territory	A user's crew management preferences for the most recently loaded service territory.
Criteria	Custom criteria added to a scheduling recipe.
FSL Operation	Used in data processing.
Gantt Filter	A custom filter that controls what data appears in the Gantt.
Gantt Palette	A palette used to color-code service appointments on the Gantt.
Map Polygon	A custom polygon, which typically represents a service territory.
Optimization Data	Schedule optimization data and results.
Optimization Request	A request to optimize the schedule, created when a scheduled optimization job runs or a user triggers an optimization action.
Scheduling Policy	A set of work rules and service objectives that guides schedule optimization.
Scheduling Policy Objective	A service objective assigned to a specific scheduling policy.
Scheduling Policy Work Rule	A work rule assigned to a specific scheduling policy.
Scheduling Recipe	A collection of optimization settings that dictate how to address a scheduling event such as an appointment cancellation.
Service Objective	A scheduling goal in an optimization operation.
SLR Cache	Cached data used in street-level routing.

Object Name	Definition
Territory Optimization Request	A schedule optimization request for a specific service territory.
User Setting	The user's dispatcher console preferences, such as the last filters used. Don't customize.
User Setting Territory	A user's dispatcher console preferences for the most recently loaded service territory.
User Territory	A relationship between a user and the service territory that they belong to.
Work Rule	A rule that narrows the list of candidates for a service appointment.
Work Rule Entry	Supplemental details for a work rule such as flexible break parameters.

SEE ALSO:

[Set Up Field Service](#)

[Field Service Developer Guide](#)

[Set Up Field Service in Experience Cloud Sites](#)

Appointment Bundle Aggregation Duration Downscale Fields

Appointment Bundle Aggregation Duration Downscals have the following fields.

Field Name	Description
Bundle Aggregation Policy	The ID of the parent appointment bundle aggregation policy.
From Bundle Member Number	The number of the first bundle member to which the downscale is applied.
Max Reduction	The maximum reduction that can be applied to a bundle member.
Name	The name of the appointment bundle aggregation duration downscale policy.
Percentage of Reduction	The percentage of duration reduction.
To Bundle Member Number	The number of the last bundle member to which the downscale is applied.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

SEE ALSO:

[Create Appointment Bundle Aggregation Duration Downscals](#)

Appointment Bundle Aggregation Policy Fields

Appointment Bundle Aggregation Policies have the following fields.

Field Name	Description
Additional Source Field	Name of an additional source field that is connected to the initial source field in the bundle member from which the value is taken. Possible values: All default and custom Service Appointment fields.
Aggregate only when the bundle is created	Indicates if you want to update the field in the bundle only when it's created.
Aggregation Action	The aggregation action to be performed. Possible values: All default and custom Service Appointment fields.
Aggregation Field Type	The target field type in the bundle to which the aggregation is directed. Possible values are: <ul style="list-style-type: none"> • Boolean • Date • Numeric • Picklist • Picklist-Multi • Skills • String
Aggregation Order	The order the aggregation is triggered.
Allow the same value to appear more than once	Indicates if you want to allow the same string to appear more than once when using the 'Sum based on Bundle Members' action type.
Bundle Policy	ID of the parent bundle policy.
Bundle's Target Field	Name of the target field in the bundle where the value is taken from the bundle member. Possible values: All default and custom Service Appointment fields.
Constant Date Value	Represents how the date value will be determined. Possible values are: <ul style="list-style-type: none"> • End of Day • Now • Null

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
	<ul style="list-style-type: none"> Start of Day
Constant Value	The constant value that is used in the aggregation.
Downscale Sorting Direction	<p>Applies only if the Set Downscaled Duration action is set. The downscaling sorting direction of the bundle member service appointments, according to their duration.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Ascending Descending
Maximum Bundle Duration	The maximum bundle duration that can be accumulated from the bundle members (after downscaling).
Name	The name of the appointment bundle aggregation policy.
Recordset Filter Criteria	The active recordset filter criteria used for aggregating the bundle members.
Source Field	Name of the source field in the bundle member from which the value is taken. Possible values: All default and custom Service Appointment fields.

SEE ALSO:

[Create an Appointment Bundle Aggregation Policy](#)

Appointment Bundle Config Fields

Appointment Bundle Configs have the following fields.

Field Name	Description
Add to Bundle Statuses	The statuses of service appointment that are allowed to be bundled. Possible values: All service appointment statuses. The default value is None.
Add travel time to bundle duration	If the bundle members aren't in the same location, add travel time between them to the bundle's duration according to their sort order. The default value is false.
Bundle Member Statuses not to be Propagated	The bundle member statuses that aren't overridden when the bundle's status is updated. Possible values: All service appointment statuses. The default value is None.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Bundle Statuses to Propagate	The bundle statuses that when updated are inherited by the bundle members. Possible values: All service appointment statuses. The default value is None.
Criteria for Automatic Unbundling	The recordset filter criteria that causes a bundle service appointment to be unbundled.
Name	The name of the Appointment Bundle Config.
Owner	ID of the owner of this object.
Remove from Bundle Statuses	The statuses of service appointments that are allowed to be removed from a bundle. Possible values: All service appointment statuses. The default value is None.
Status on Removal from Bundle	The status that a service appointment is given when it's removed from a bundle. Possible values: All service appointment statuses. The default value is None.
Statuses not to Update on Unbundling	The statuses that aren't updated when a bundle is unbundled. Possible values: All service appointment statuses. The default value is None.

SEE ALSO:

[Create an Appointment Bundle Config](#)

Appointment Bundle Policy Fields

Appointment Bundle Policies have the following fields.

Field Name	Description
Allow Scheduling Dependencies in Bundle	This field is reserved for future use.
Automatic Bundling	Indicates if the policy is relevant for automatic bundling.
Bundle End Time Field Name	If <code>IsTimeCalcByBundleDurationField</code> is true, this field represents the name of the field used for entering the end time of the bundle.
Bundle Start Time Field Name	If <code>IsTimeCalcByBundleDurationField</code> is true, this field represents the name of the field used for entering the start time of the bundle.
Constant Time Value	If <code>IsTimeCalcByBundleDurationField</code> is true, this field represents the total time of the bundle as a preset constant value.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Filter Criteria	The active recordset filter criteria used for the bundle members. Only service appointments that meet the criteria can be bundled.
Limit Amount of Bundle Members	The maximum number of bundle members that can be included in a bundle.
Limit Duration of Bundle	The maximum duration of a bundle.
Manual Bundling	Indicates if the policy is relevant for manual bundling. The default value is 'false'.
Name	Name of the bundle policy.
Owner	ID of the owner of this object.
Priority	The priority level that this bundle policy should be given when the bundle policies are analyzed using the automatic mode.
Time Calculation by Bundle Duration Field	Indicates if the bundle's duration is validated. If true, the bundle's start time is subtracted from the bundle's end time. If the result is a negative value, it uses the entered ConstantTimeValue as the bundle duration. The default value is 'false'.

SEE ALSO:

[Create an Appointment Bundle Policy](#)

Appointment Bundle Policy Service Territory Fields

Appointment Bundle Policy Service Territories have the following fields.

Field Name	Description
Bundle Policy	The ID of the parent bundle policy.
Name	The name of the appointment bundle service territory.
Service Territory	The ID of the service territory.

SEE ALSO:

[Create Appointment Bundle Policy Service Territories](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Appointment Bundle Propagation Policy Fields

Appointment Bundle Propagation Policies have the following fields.

Field Name	Description
Add Constant Value	Indicates if you want to enable adding a constant value to the bundle members.
Additional Constant Value	The additional constant value that is connected to the initial constant value to be added to the bundle members.
Bundle Field Name	Name of the source field in the bundle from which the value is taken.
Bundle Member Field Name	Name of the target field in the bundle member where the value is inherited from the bundle.
Bundle Policy	ID of the parent bundle policy.
Constant Date Value	Represents how the date value is determined.
Constant Value	The constant value to be added to the bundle members. Possible values are: <ul style="list-style-type: none"> • End of Day • Now • Null • Start of Day
Name	The name of the appointment bundle propagation policy.
Update on Add	Indicates if you want to enable updating the fields of the bundle members when they are added to the bundle.
Update on Remove	Indicates if you want to enable updating the fields of the bundle members when they are removed from the bundle.
Update on Unbundle	Indicates if you want to enable updating the fields of the bundle members when performing the Unbundle action.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

SEE ALSO:

[Create an Appointment Bundle Propagation Policy](#)

Appointment Bundle Restriction Policy Fields

Appointment Bundle Restriction Policies have the following fields.

Field Name	Description
Allow Empty	Allows a bundle member service appointment with an empty Restriction Field Name to be bundled.
Bundle Policy	ID of the parent bundle policy.
Name	The name of the appointment bundle restriction policy.
Restrict by Date Only	Indicates if you want the bundle to be restricted according to the calendar date only, ignoring the time of day.
Restrict in Automatic Mode	Indicates if you want to apply this restriction when using the automatic mode.
Restrict in Manual Mode	Indicates if you want to apply this restriction when using the manual mode.
Restriction Field Name	Name of the field in the service appointment used for applying the restriction. Possible values: All default and custom Service Appointment fields.

SEE ALSO:

[Create an Appointment Bundle Restriction Policy](#)

Appointment Bundle Sort Policy Fields

Appointment Bundle Sort Policies have the following fields.

Field Name	Description
Bundle Policy	The ID of the parent bundle policy.
Name	Name of the appointment bundle sort policy.
Sort Direction	The order of the appointments in a bundle. Possible values are: <ul style="list-style-type: none"> Ascending Descending
Sort Field Name	Name of the field in the service appointment used for sorting the bundle members. Possible

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
	values: All default and custom Service Appointment fields.
Sort Order	The order of fields used for sorting the bundle members.
Sort Type	The applied sort type for arranging the bundle. Sort for Automatic Bundling defines the order that automated bundling uses to examine the candidate service appointments to be bundled. Sort Within a Bundle defines the order of bundle members. It's also used when you unbundle to define the order that the service appointments are scheduled on the Gantt.

SEE ALSO:

[Create an Appointment Bundle Sort Policy](#)

Asset Downtime Period Fields

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

Field Name	Description
Asset Downtime Period Number	The unique number of this asset downtime period record.
Asset	The asset this asset downtime period applies to.
Description	The description of this asset downtime period.
Downtime Type	The type of this asset downtime period. Possible values are: <ul style="list-style-type: none"> Planned Unplanned
End Date	The date when this asset downtime period ended.
Outside Uptime Calculation Period	Whether this asset downtime period is excluded from the calculation of accumulated downtime and accumulated unplanned downtime, and therefore not included in availability and reliability calculations.
Start Date	The date when this asset downtime period started.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Expense Fields for Field Service

Expenses let your service resources track costs and associate them to work orders.

Field Name	Description
Account ID	The ID of the account associated with the work order.
Amount	The amount of the expense.
Created By	(Read Only) User who created the expense.
Created Date	(Read Only) Date the expense was created.
Expense End Date	If the expense was incurred over multiple days, the Expense End Date is the last day that the expense covers.
Expense Number	An autogenerated number that uniquely identifies the expense.
Expense Start Date	If the expense was incurred over multiple days, the Expense Start Date is the first day that the expense covers.
Expense Type	The type of expense. The default choices are Billable and Non-billable.
Last Modified By	(Read Only) User who last modified the expense.
Last Modified Date	(Read Only) Date the expense was last modified.
Owner Name	Expense owner.
Transaction Date	The day that the expense was incurred, or the payment date for the expense.
Work Order ID	The associated work order.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Job Profile Fields for Field Service

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

Field Name	Description
Created By	(Read Only) User who created the job profile.
Created Date	(Read Only) Date the job profile was created.
Description	The description of the job profile.
Job Profile Name	The associated job profile.
Last Modified By	(Read Only) User who last modified the job profile.
Last Modified Date	(Read Only) Date the job profile was last modified.
Owner Name	The name of user or group that owns the job profile.

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.

Field	Description
Article ID	The ID of the linked article record, which is created when an article is attached to a record.
Article Title	The title of the attached article.
Article Version	<p>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.</p> <p>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.</p> <p>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.</p>
Knowledge Article ID	Required. The ID of the article that is attached to the record.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field	Description
Last Viewed	The date the article was last viewed.
Linked Object Type	Read only. The type of record that the article is attached to. For example, if the article is attached to a work order, this field displays "Work Order."
Linked Record ID	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.
Record Type ID	The record type of the linked article. This field is populated only if record types are used.

SEE ALSO:

[Set Up Knowledge for Work Orders](#)

[Set Up Knowledge for Work Orders](#)

[Attach Knowledge Articles to Work Orders or Work Types](#)

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.

Field Name	Description
Close Date	Date the location closed or went out of service.
Construction End Date	Date construction ended at the location.
Construction Start Date	Date construction began at the location.
Description	A brief description of the location.
Driving Directions	Directions to the location.
Inventory Location	Indicates whether the location stores parts. This field must be selected if you want to associate the location with product items.
Location	The geographic location.
Location Level	The location's position in a location hierarchy. If the location has no parent or child locations, its level is 1. Locations that belong to a hierarchy

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
	have a level of 1 for the root location, 2 for the child locations of the root location, 3 for their children, and so forth.
Location Name	Location name. For example, Service Van #4.
Location Type	Picklist of location types, which can be customized. By default, no value is selected. The available values are: <ul style="list-style-type: none"> • Warehouse • Site • Van • Plant
Mobile Location	Indicates whether the location moves. For example, a truck or tool box.
Open Date	Date the location opened or came into service.
Owner Name	The location's owner or driver.
Parent Location	The location's parent location. For example, if vans are stored at a warehouse when not in service, the warehouse is the parent location.
Possession Date	The date the location was purchased.
Remodel End Date	Date remodel construction ended at the location.
Remodel Start Date	Date remodel construction ended at the location.
Root Location	(Read Only) The top-level location in the location's hierarchy.
Time Zone	Picklist of available time zones.
Vistor Address	Lookup to an account's or client's address.

Address

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

Field Name	Description
Address	Name for the address.
Address Type	Picklist of address types. The values are: <ul style="list-style-type: none"> • Mailing • Shipping • Billing • Home
Description	A brief description of the address.

Field Name	Description
Driving Directions	Directions to the address.
Location Type	The type of location associated with the address. The values are: <ul style="list-style-type: none"> • Warehouse (default) • Site • Van • Plant
Parent	A lookup field to the parent location .
Time Zone	Picklist of available time zones.

Associated Location

Associated locations represent a relationship between an account and a location. Multiple accounts can be associated with a location; for example, a shopping mall location might be related to several accounts. They have the following fields.

Field Name	Description
Account Name	The account associated with the location.
Active From	Date and time the location starts being associated with the account.
Active To	Date and time when the location is no longer associated with the account.
Associated Location Name	(Read Only) Auto-generated number for the association.
Location Name	A lookup field to the associated location.
Type	Picklist of address types. The values are: <ul style="list-style-type: none"> • Bill To • Ship To

SEE ALSO:


- [Create Inventory Locations for Field Service](#)
- [Customize Inventory Settings in Field Service](#)
- [Create Inventory Locations for Field Service](#)
- [Product Item and Inventory Fields](#)
- [Product Request and Transfer 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.

 **Note:** The Frequency and Frequency Type fields began their phased retirement in Summer '22. To prepare for this retirement and take advantage of updated features, migrate your frequency and frequency type data to maintenance work rules. The retired frequency fields impact work order generation. Complete the migration before Jan '24.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Account	The associated account, which typically represents the customer receiving the maintenance service.
Auto-generate work orders	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.
Contact	The associated contact.
Date of the first work order in the next batch	<p>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. You can use this field to enforce a delay before the first maintenance visit, for example, where you want monthly maintenance to begin one year after the purchase date.</p> <p>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 lists a Suggested Maintenance Date of May 1. And the dates on the later work orders are based on the Generation Timeframe and Frequency settings.</p> <p> 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</p>

Field Name	Description
	maintenance assets, this date auto-updates on the maintenance plan after each batch is generated.
Description	A brief description of the plan.
End Date	The last day the maintenance plan is valid.
Frequency	(Optional) Amount of time between the plan's work orders. The unit is specified in the Frequency Type field.
Frequency Type	<p>(Optional) The unit of frequency:</p> <ul style="list-style-type: none"> • Days • Weeks • Months • Years <p>For example, to perform monthly maintenance visits you need a work order for each visit, so enter 1 in Frequency and select Months.</p>
Generate new batch upon completion	<p>If this option is 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.</p> <p>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.</p>
Generation Horizon (Days)	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.
Generation Timeframe	(Required) How far in advance work orders are generated in each batch. The unit is specified in the Generation Timeframe Type field.
Generation Timeframe Type	<p>(Required) The generation timeframe unit:</p> <ul style="list-style-type: none"> • Days • Weeks • Months • Years

Field Name	Description
	For example, to generate 3 months' worth of work orders at a time, enter 3 in Generation Timeframe and select Months.
Location	Where the service takes place.
Maintenance Plan Number	(Read Only) An auto-assigned number that identifies the maintenance plan.
Maintenance Plan Title	A name for the maintenance plan.
Maintenance Window End (Days)	Days after the suggested service date on the work order that its service appointment can be scheduled.
Maintenance Window Start (Days)	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.
Owner	Maintenance plan owner.
Service Appointment Generation Method	How service appointments are generated when more than one asset is associated with the maintenance plan and work order generation method is One work order line item per asset . Choices are one service appointment for the parent work order or one service appointment for each work order line item.
Service Contract	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.
Start Date	The first day the maintenance plan is valid.
Work Order Generation Method	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.
Work Order Generation Status	(Read Only) Indicates whether work order generation is: <ul style="list-style-type: none"> • needs review • no work order generated • completed • unsuccessful You can generate only one batch at a time.

Field Name	Description
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.


Field Name	Description
Asset	Asset associated with the maintenance plan.
Contract Line Item	Contract line item associated with the maintenance asset. This field can only list a contract line item that is associated with the asset, and whose parent service contract is associated with the parent maintenance plan.
Date of the first work order in the next batch	The suggested date of service for the first work order, not the date the work order is created. 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.
Maintenance Asset Number	(Read Only) An auto-assigned number that identifies the maintenance asset.
Maintenance Plan	Maintenance plan associated with the maintenance asset.
Work Type	Work type associated with the maintenance asset. 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 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.](#)

Field Name	Description
Date of the first work order in the next batch	The suggested date of service for the first work order, not the date the work order is created. This date corresponds to the work order's

Field Name	Description
	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.
Maintenance Asset	The asset associated with the maintenance plan.
Maintenance Work Rule Name	(Read Only) A name assigned to this maintenance work rule in the format MWR-nnnn.
Maintenance Plan	Maintenance plan associated with the maintenance asset.
Maintenance Work Rule Title	The title of this work order rule.
Maintenance Work Rule Type	The type of maintenance work rule: <ul style="list-style-type: none"> • Calendar-based (default): uses a recurrence pattern • Criteria-based: uses a recordset filter criteria that defines conditions
Generate on a Floating Schedule	Generates work orders based on a floating, not fixed, cadence. <p> Note: To display this field, from Setup enter Field Service Settings and select Update the work order generation based on the completion date of the previous work order.</p>
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	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.

SEE ALSO:

[Create Field Service Maintenance Plans](#)

[Create Field Service Maintenance Plans](#)

[Guidelines for Generating Work Orders from a Maintenance Plan](#)

[Guidelines for Generating Work Orders from a Maintenance Plan](#)

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.

Field Name	Description
Description	The description of the operating hours. Add any details that aren't included in the name.
Name	The name of the operating hours. For example: Summer Hours, Winter Hours, or Peak Season Hours.
Time Zone	The time zone that the operating hours fall within.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Time Slot

Time slots represent a time period within a day when field service work can be completed. After you create operating hours, create time slots for each day via the Time Slots related list.

Field Name	Description
Day of Week	The day of the week when the time slot takes place.
End Time	The time when the time slot ends.
Name	The name of the time slot. The name is auto-populated to a day and time format—for example, Monday 9:00 AM - 10:00 PM—but you can manually update it if you wish.
Operating Hours	The operating hours that the time slot belongs to. An operating hours' time slots appear in the Operating Hours related list.

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

SEE ALSO:

[Guidelines for Creating Operating Hours for Field Service](#)

[Guidelines for Creating Operating Hours for Field Service](#)

Product Request and Transfer Fields

Product requests, product request line items, product transfers, and shipments have these fields. Some fields aren't 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: <ul style="list-style-type: none"> • 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
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: <ul style="list-style-type: none"> • Draft: Finalizing the product request details. • Submitted: The product request is ready for processing. • Received: The department in charge of fulfilling the request is working on it.
Work Order	The work order associated with the product request.
Work Order Line Item	The work order line item associated with the product request.

Product Request Line Item

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

Field Name	Description
Account	The account associated with the product request line item.
Case	The case associated with the product request line item.
Description	Notes and context about the request.
Destination Location	Where the product is delivered.
Need By Date	Date the product must be delivered by.
Parent	The product request that the line item belongs to.
Product	The product being requested.
Product Request Line Item Number	(Read Only) An auto-assigned number that identifies the product request line item.
Quantity Requested	The amount requested.
Quantity Unit Of Measure	Units of the requested product; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
Shipment Type	The type of shipment. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • Rush • Overnight • Next Business Day • Pick Up

Field Name	Description
Ship To Address	The physical address where the product is delivered.
Source Location	Where the product is at time of the request.
Status	The status of the shipment. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • 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.

Field Name	Description
Description	Notes or context about the transfer.
Destination Location	The location where the product is to be delivered.
Expected Pickup Date	Date the product is expected to be picked up.
Owner	Owner of the product transfer.
Product Name	The product associated with the product transfer. If the product is being transferred from outside your inventory—for example, if it's being ordered from a manufacturer—enter a product name. Otherwise, we recommend entering a source product item.
Product Request	The product request associated with the product transfer. Not all transfers are created in response to a product request.
Product Request Line Item	The product request line item associated with the product transfer. Create a separate transfer for each line item on a product request.
Quantity Received	Amount of product received at the destination location.
Quantity Sent	Amount of product sent from the source location.
Quantity Unit Of Measure	The units of the product; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.

Field Name	Description
Received	<p>Indicates that the product was received. To mark a product transfer received, you need permission to update product items. After you mark a product item received, you can't undo it.</p> <p>To find out what happens when a product transfer is marked received, see Guidelines for Transferring Inventory.</p>
Received By	The contact who received the product at the destination location.
Return Order	The return order associated with the product transfer.
Return Order Line Item	The return order line item associated with the product transfer.
Sent	<p>Indicates whether the product transfer was sent.</p> <p>This option is applicable only if the transfer record mode for the serialized product is Send and Receive.</p>
Shipment	The shipment related to the product transfer.
Shipment Expected Delivery Date	The expected date of delivery, inherited from the related shipment.
Shipment Status	<p>The shipment status, inherited from the related shipment. It includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • Shipped • Delivered
Shipment Tracking Number	The shipment tracking number, inherited from the related shipment.
Shipment Tracking URL	The shipment tracking URL, inherited from the related shipment.
Source Location	The location where the product is coming from.
Source Product Item	<p>The product item representing the stock at the source location. Enter a source product item if the product is being transferred from a location within your inventory, such as a warehouse. Specifying a source product item on a product transfer automatically updates the quantity at the source location to reflect the transfer.</p> <p>If the product is being transferred from outside your inventory—for example, if it's being ordered from a manufacturer—use the Product Name field instead.</p>
Status	<p>Status of the product transfer. It includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • Ready for Pickup • Completed

Product Transfer State

Product transfer state refers to an action taken to associate a serialized product to a product transfer and indicates the action done to the serialized product. The new state is a result of the action. The product transfer state is created when serialized products are attached to the product transfer. This object has these fields.

Field Name	Description
Action	The action that must be performed on the inventory item.
Product Transfer	The transfer for which this inventory transaction was requested.
Serialized Product	The serialized product being transferred.
Transfer State	The new status for the inventory item.

Shipment

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

Field Name	Description
Actual Delivery Date	Date the product was delivered.
Delivered To	The person or entity the product was delivered too.
Description	Notes or context about the shipment.
Destination Location	The place the product is to be delivered.
Expected Delivered Date	Date the product is expected to be delivered.
Owner Name	Owner of the shipment.
Ship From Address	The place the product is coming from.
Shipment Number	(Read Only) An auto-assigned number that identifies the shipment.
Shipping Provider	The company or person making the transfer.
Ship To Address	The address the product is to be delivered.
Source Location	The address the product is shipped from.
Status	The status of the shipment. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> Shipped—The product is in transit. Delivered—The product is at the destination location.
Tracking Number	Tracking number for the shipment.

Field Name	Description
Tracking URL	URL of website used for tracking the shipment.

SEE ALSO:

- [Customize Inventory Settings in Field Service](#)
- [Request Inventory in Field Service](#)
- [Transfer Inventory in Field Service](#)
- [Track Inventory Shipments in Field Service](#)
- [Guidelines for Transferring Inventory](#)
- [Product Item and Inventory Fields](#)
- [Product Item and Inventory Fields](#)
- [Location Fields for Field Service](#)
- [Return Order Fields](#)
- [Set Up Your Field Service Inventory](#)
- [Set Up Product Requests in the Field Service Mobile App](#)
- [Set Up Product Requests in the Field Service Mobile App](#)

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.

Field Name	Description
Location	Location associated with the product item. This location usually indicates where the product item is stored.
Owner	The product item's owner.
Product Item Number	(Read Only) Auto-generated number identifying the product item.
Product Name	Product associated with the product item.
Quantity On Hand	The quantity at the location. If you want to add a serial number, this value must be 1.
Quantity Unit of Measure	Units of the product item; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Serial Number	<p>A unique number for identification purposes. If you want to enter a serial number, the Quantity on Hand must be 1.</p> <p> Tip: To learn more about the pros and cons of assigning serial numbers to product items, see Create Product Items to Represent Inventory.</p>

Product Item Transaction

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

Field Name	Description
Description	A description of the transaction. The description is blank when the transaction record is created, but can be updated.
Product Item	The associated product item.
Product Item Transaction Number	(Read Only) Auto-generated number identifying the product item transaction.
Quantity	The quantity of the product item involved in the transaction. If inventory was consumed, the quantity is negative.
Related Record	(Read Only) The product consumed or product transfer related to the action. If the action wasn't related to consumption or transfer, the related record is blank.
Transaction Type	<p>The action that the transaction tracks.</p> <ul style="list-style-type: none"> • Replenished: When a part is stocked at a location. A Replenished transaction is created when a product item is created. • Consumed: When parts are consumed to complete a work order. A Consumed transaction is created when a record is added to the Products Consumed related list on a work order or work order line item. • Adjusted: When there'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. • Transferred: When parts are transferred between locations.


Product Required

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

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

Product Consumed

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

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

Field Name	Description
Consumed	Indicates that a product consumed was processed if the product it refers to has <code>IsSerialized=true</code> selected.
Description	Notes and context about the product consumed.
Discount	The discount provided.
List Price	The list price of the product.
Price Book Entry	Price book associated with the product consumed. If the work order and the product item's associated product are related to the same price book, the Price Book Entry auto-populates based on the product item.
Product	Product associated with the product consumed.
Product Consumed Number	(Read Only) Auto-generated number identifying the product consumed.
Product Item	Product item associated with the product consumed. Creating a product consumed record subtracts the quantity consumed from the linked product item's quantity.
Quantity Consumed	The quantity of products consumed.
Quantity Unit of Measure	Units of the consumed item; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
Subtotal	The product's unit price multiplied by the quantity consumed.

Field Name	Description
Total Price	The product's unit price multiplied by the quantity consumed minus the discount.
Unit Price	The price per unit of the product consumed.
Work Order	Work order associated with the product consumed.
Work Order Line Item	Work order line item associated with the product consumed.

Product Consumed State

Product consumed state refers to the new state of the serialized product after it's consumed. This object has these fields.

Field Name	Description
Consumed State	The new state of the serialized product after it's consumed.
Product Consumed	The Product Consumed used to consume the serialized products.
Serialized Product	The serialized product being consumed.

Product

Products are products that your company sells. They have these fields.

Field Name	Description
Serialized	Indicates whether a product is serialized.
Transfer Record Mode	If serialized, indicates when the serial number is recorded: <ul style="list-style-type: none"> SendAndReceive means the serial number is recorded when sending or receiving.

Field Name	Description
	<ul style="list-style-type: none"> ReceiveOnly means the serial number is recorded when receiving only.

SEE ALSO:

- [Customize Inventory Settings in Field Service](#)
- [Create Product Items to Represent Inventory](#)
- [Track Required Inventory in Field Service](#)
- [Track Inventory Consumption in Field Service](#)
- [Guidelines for Consuming Inventory](#)
- [Location Fields for Field Service](#)
- [Product Request and Transfer Fields](#)
- [Return Order Fields](#)
- [Set Up Your Field Service Inventory](#)
- [Product Request and Transfer Fields](#)

Product Service Campaign Fields

Product service campaigns and product service campaigns 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.

Product Service Campaign

Product service campaign defines the activities to be performed on a product, such as a product recall for safety issues or product defects.

Field Name	Description
Description	The description of the product service campaign.
End date	The date that the product service campaign ends on.
Owner	The owner of the product service campaign.
Priority	<p>The priority of the product service campaign. Available values are:</p> <ul style="list-style-type: none"> Critical High Medium Low

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Product	The product associated with this product service campaign.
Product service campaign name	The name of the product service campaign.
Start date	The date that the product service campaign starts on.
Status	<p>The status of the product service campaign. The picklist includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • New—Product service campaign created, but there's no activity yet. • In Progress—Product service campaign began. • 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.
Status category	<p>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.</p> <p>If you create custom Status values, you must indicate which category it belongs to. For example, you create a Waiting for Response value and decide that it belongs in the On Hold category.</p> <p>To learn which processes reference Status Category, see How are Status Categories Used?</p>
Type	<p>The type of the product service campaign. The picklist includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • Modification—The asset requires an on-site alteration. • Recall—The asset must be returned to the manufacturer for modification or upgrade. • Service—The asset requires service. • Upgrade—The asset requires updating.
Work type	The work type associated with the product service campaign order. When a work type is selected, the product service campaign automatically inherits the work type's Duration, Duration Type, and required skills.

Product Service Campaign Item

Represents a product service campaign's asset.

Field Name	Description
Asset	The asset associated with the product service campaign item.
Product	The product associated with this product service campaign item.
Product service campaign	The item's parent product service campaign record.
Product service campaign item number	The ID of the product service campaign item.
Status	<p>The status of the product service campaign. The default values are:</p> <ul style="list-style-type: none"> • New—Product service campaign created, but there's no activity yet. • In Progress—Product service campaign began • 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.
Status category	<p>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.</p> <p>If you create custom Status values, you must indicate which category it belongs to. For example, you create a Waiting for Response value and decide that it belongs in the On Hold category.</p> <p>To learn which processes reference Status Category, see How are Status Categories Used?</p>

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.

Field Name	Description
Account	The account associated with the return order.
Case	The case associated with the return order.
Contact	The contact associated with the return order.
Description	Notes or context about the return order.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Destination Location	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.
Expected Arrival Date	The date when the items are expected to arrive at the destination location.
Order	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.
Owner	The owner of the return order.
Product Request	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 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.
Product Service Campaign	The product service campaign associated with the return order.
Return Order Number	(Read only) Auto-generated number identifying the return order.
Returned By	The user returning the items.
Ship From Address	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.
Shipment Type	The type of shipment associated with the return order. Available values are: <ul style="list-style-type: none"> • 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.

Field Name	Description
Status	The status of the return order. Available values are: <ul style="list-style-type: none"> • Draft • Submitted • Approved • Canceled • Closed

Return Order Line Item

Field Name	Description
Asset	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.
Description	Notes or context about the return order line item.
Destination Location	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.
Order Product	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.
Processing Plan	Indicates the preferred fate of the items following their return. Available values are: <ul style="list-style-type: none"> • Repair—Repair the items and return them to the owner • Discard—Discard the items • Salvage—Salvage the items' working components • Restock—Return the items to your inventory
Product	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.
Product Item	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.
Product Request Line Item	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.

Field Name	Description
Product Service Campaign	The product service campaign associated with the return order.
Product Service Campaign Item	The product service campaign item associated with the return order.
Quantity Returned	The quantity of items being returned. If multiple types of products are being returned, track each product in a different return order line item.
Quantity Unit of Measure	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.
Reason for Return	The reason the items are being returned. Available values are: <ul style="list-style-type: none"> • Damaged • Defective • Duplicate Order • Wrong Item • Wrong Quantity • Not Satisfied • Outdated • Other
Repayment Method	The method used to reimburse the customer or owner for the items being returned. Available values are: <ul style="list-style-type: none"> • Replace—The items are replaced • Refund—The items are returned and the owner is refunded • Credit—The items are returned and the owner receives credit for them • Return—The items are returned to the owner, for example, after repairs
Return Order	The return order that the return order line item belongs to.
Return Order Line Item Number	(Read only) Autogenerated number that identifies the return order line item.
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

Field Name	Description
	worker's service vehicle to a warehouse, the service vehicle is the source location.

SEE ALSO:

- [Product Item and Inventory Fields](#)
- [Product Request and Transfer Fields](#)
- [Guidelines for Tracking Customer Returns](#)
- [Track Customer Returns in Field Service](#)
- [Track Customer Returns in Field Service](#)
- [Guidelines for Tracking Customer Returns](#)

Recordset Filter Criteria Fields

Recordset filter criteria and recordset filter criteria rules have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Recordset Filter Criteria

Filter criteria store service appointment field criteria used for shift scheduling.

Field Name	Description
Active	Marks the recordset filter criteria available for use with the source object. For example, active criteria can be used to filter shifts in scheduling and optimization.
Description	Notes or context about the recordset filter criteria.
Filtered Object	Defines which object contains the records to be filtered. Possible values are: <ul style="list-style-type: none"> • Asset • Service Appointment
Owner Name	The owner of the recordset filter criteria.
Recordset Filter Criteria Name	The name of the recordset filter criteria.
Source Object	(Read only) Defines which object contains the link to the filter criteria. Possible values are: <ul style="list-style-type: none"> • Shift • Maintenance Work Rule

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Recordset Filter Criteria Rules

Field Name	Description
Logical Operator	Defines if the criteria is valid if all conditions are true or at least one of the conditions is true
Add lead-time to usage-based work rules	Allows you to create counter-based usage and duration-based usage rule types.
Criteria Field	The Service Appointment or Asset field used in the filter condition rule.
Recordset Filter Criteria	The ID of the linked recordset filter criteria.
Recordset Filter Criteria Rule Number	(Read only) Auto-generated number that identifies the filter condition rule.
Operator	The criteria used to compare the Criteria Field to the Value field.
Value	The value of the service appointment field to match on.
Usage Rate	Stores the daily usage rate of the asset. The unit for the usage rate must be per day.
Add Condition	Adds another rule to the criteria.

Serialized Products and Serialized Products Transactions Fields

Review the Serialized Products and Serialized Products Transactions fields. Sometimes you can't see or edit certain fields because of your page layout and field-level security settings.

Serialized Products

Each serialized product has a serial number. They have these fields.

Field Name	Description
Asset	The asset associated with the serialized product.
Expiration Date	The date the product expires.
Name	The name of the serialized product record (auto-generated).
Owner Name	The person who owns the serialized product.
Product	The product associated with the serialized product.
Product Item	The product item associated with the serialized product.
Serial Number	The serial number of the product.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Status	The status of the serialized product.

Serialized Products Transactions

Serialized product transactions are auto-generated records that help you track the status change for a serialized product. They have these fields.

Field Name	Description
Name	The number automatically assigned to the serialized product.
Serialized Product	The serialized product associated with the transactions.
Related Record	The product transfer or product consumed associated with the serialized product.
Transaction Type	The action that the transaction tracks.

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	Description
Account	(Read only) The account associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent. Otherwise, it remains blank.
Actual Duration (Minutes)	The number of minutes that it took the resource to complete the appointment after arriving at the address. When values are first added to the Actual Start and Actual End fields, the Actual Duration is automatically populated to list the difference between the Actual Start and Actual End. If the Actual Start and Actual End fields are subsequently updated, the Actual Duration field doesn't reupdate, but you can manually update it.
Actual End	The actual date and time the appointment ended.
Actual Start	The actual date and time the appointment started.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Address	The address where the appointment is taking place. The address is inherited from the parent record if the parent record is a work order or work order line item.
Appointment Number	An auto-assigned number that identifies the appointment.
Arrival Window End	The end of the window of time in which the 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.
Arrival Window Start	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.
Bundle	Indicates if this service appointment is a bundle service appointment. The default value is false.
Bundle Member	Indicates if this service appointment is a bundle member service appointment. The default value is false.
Bundle Policy	Reference to the bundle policy associated with this service appointment.
Contact	The contact associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent.
Description	The description of the appointment.
Due Date	The date by which the appointment must be completed. Earliest Start Permitted and Due Date typically reflect terms in the customer's service-level agreement.
Duration	The estimated length of the appointment. If the parent record is work order or work order line item, the appointment inherits its parent's duration, but it can be manually updated. The duration is in minutes or hours based on the value selected in the Duration Type field.
Duration Type	The unit of the duration: Minutes or Hours.
Earliest Start Permitted	The date after which the appointment must be completed. Earliest Start Permitted and Due Date typically reflect terms in the customer's service-level agreement.
Manually Bundled	Indicates if this bundle was created manually. The default value is false.

Field Name	Description
Offsite Appointment	<p>Indicates whether this appointment can be done remotely, with no travel time added to the schedule. For example, work such as remote technical assistance, filling out reports, or renewal of health and safety certification can be done from anywhere.</p> <p>Enhanced Scheduling and Optimization must be enabled. As of Summer '23 new Salesforce orgs have Enhanced Scheduling and Optimization enabled by default for all service territories. Orgs existing prior to Summer '23 must add the Offsite Appointment field to the page layout.</p>
Parent Record	The parent record associated with the appointment. The parent record can't be updated after the service appointment is created.
Parent Record Status Category	(Read only) The Status Category of the parent record. If the parent record is a work order or work order line item, this field is populated; otherwise, it remains blank.
Parent Record Type	(Read only) The type of parent record: Account, Asset, Lead, Opportunity, Work Order, or Work Order Line Item.
Related Bundle	The bundle that this service appointment is a member of.
Scheduled End	The time at which the appointment is scheduled to end. If you're using the Field Service managed package with the scheduling optimizer, this field is populated when the appointment is assigned to a resource. $\text{Scheduled End} - \text{Scheduled Start} = \text{Estimated Duration}$.
Scheduled Start	The time at which the appointment is scheduled to start. If you're using the Field Service managed package with the scheduling optimizer, this field is populated when the appointment is assigned to a resource.
Schedule Mode	(Read only) Shows Auto or Manual after performing automated or manual scheduling. When using Enhanced Scheduling and Optimization, the Schedule Mode field shows how the appointment was scheduled: Drag and Drop, Schedule, Global Optimization, In-Day Optimization, or Resource Optimization.
Service Note	Add notes such as an appointment summary or recommendations for future work. Depending on your settings, these notes might appear on a customer-facing service report.
Service Territory	The service territory associated with the appointment. If the parent record is a work order or work order line item, the appointment inherits its parent's service territory.
Status	<p>The status of the appointment. The picklist includes the following values, which can be customized:</p> <ul style="list-style-type: none"> None—Default value.

Field Name	Description
	<ul style="list-style-type: none"> • Scheduled—The service appointment is scheduled. • Dispatched—The service resource is in route. • In Progress—The service resource started the work. • Cannot Complete—The service resource couldn't complete the appointment for any reason. • Completed—The service resource completed the work. • Canceled—The service appointment has been canceled.
Status Category	<p>The category that each Status value falls into. The Status Category field's values are identical to the standard Status values.</p> <p>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.</p> <p>To learn which processes reference Status Category, see How are Status Categories Used?</p>
Subject	A short phrase describing the appointment.
Work Type	<p>(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.</p> <p>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.</p>

SEE ALSO:


- [Create Service Appointments for Field Service](#)
- [Guidelines for Creating Service Appointments for Field Service](#)
- [Manage Field Service Appointments](#)
- [Schedule Appointments from the Record Feed](#)
- [Customize the Field Service Appointment Life Cycle](#)
- [Schedule Emergency Appointments](#)
- [Update a Field Service Appointment's Status](#)
- [Work Rule Type: Match Time Rule](#)
- [Work Rule Type: Match Fields](#)
- [Schedule Appointments Without Travel](#)

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.

Field Name	Description
Crew Size	<p>The ideal number of members on the crew. This field doesn't update when you add or remove members. The maximum crew size is 100.</p> <p>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.</p>
Gantt Color	<p>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.</p> <p> <i>This is a Field Service managed package feature.</i></p>
Name	The name of the service crew. For example, Repair Crew.
Owner	By default, the person who created the service crew.


EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

Field Name	Description
End Date	The last day that the service resource belongs to the crew. You can use this field to track employment dates for contractors.
Gantt Label	<p>Custom label that appears beneath the member's name on the Gantt. For example, enter the person's job title.</p> <p> <i>This is a Field Service managed package feature.</i></p>

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

SEE ALSO:

- [Create Service Crews](#)
- [Considerations for Scheduling Service Crews](#)
- [View Service Crews on the Gantt](#)
- [Create Service Crews](#)
- [Set Up Crew Management](#)
- [Manage Field Service Crew Membership](#)

Service Report Fields

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

Service Report


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

Field Name	Description
Parent ID	The ID of the record that the service report is summarizing. For example, if you click Create Service Report on a service appointment, this field lists the service appointment's record ID.
Service Report Language	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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Service Report Name	The name of the service report.
Service Report Template	The template used to create the service report. 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.
Signed	Indicates that the service report contains one or more signatures.  Tip: To quickly find signed reports, add this field to the Service Reports related list on work orders.

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.

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

Field Name	Description
Signed By	The name of the person signing.

SEE ALSO:

- [Create Field Service Customer Reports](#)
- [Field Service Guidelines for Using Signatures on Service Reports](#)
- [Create Field Service Report Templates](#)
- [Create Field Service Customer Reports](#)
- [Field Service Guidelines for Creating Service Report Templates](#)
- [Field Service Guidelines for Using Signatures on Service Reports](#)
- [Create Field Service Report Templates](#)
- [Field Service Guidelines for Creating Service Report Templates](#)
- [Manage Field Service Reports](#)

Service Resource Fields for Field Service

Service resources, resource absences, resource capacity records, assigned resources, and resource preferences have these fields. Sometimes certain fields aren't 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. The Capacities related list shows a resource's capacity.
Description	The description of the resource.
Include in Scheduling Optimization	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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
	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.
Location	The location associated with the service resource. For example, a service vehicle driven by the service resource.
Name	The resource's name. This name can be the name or title of the associated user or crew.
Resource Type	<p>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.</p> <p>Field Service users can see Asset as a picklist option in the Resource Type field. But you can't save the record when you select Asset if you don't have access to Lightning Scheduler. To schedule assets with Salesforce Field Service, contact your account executive to get the required license.</p>
Service Crew	<p>The associated service crew. If the service resource represents a crew, select the crew.</p> <p>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.</p>
User	The associated user. If the service resource represents a crew instead of a single user, leave this field blank.

Resource Absence

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

Field Name	Description
Absence Number	(Read only) An auto-generated number identifying the absence.
Absence Type	The type of absence: Meeting, Training, Medical, or Vacation. You can add custom values if needed, but the name Break is reserved for the managed package.
Address	The address associated with the absence.
Description	The description of the absence.
End Time	The date and time when the absence ends.
Resource Name	The absent service resource.

Field Name	Description
Start Time	The date and time when the absence begins.

Resource Capacity

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

Field Name	Description
End Date	The date the capacity ends, such as the end date of a contract.
Name	(Read only) An auto-generated number identifying the capacity record.
Hours per Time Period	The number of hours that the resource can work per time period. You must fill out this field, the Work Items per Time Period field, or both.
Service Resource	The associated resource.
Start Date	The date the capacity goes into effect.
Time Period	Day, Week, or Month. For example, if a resource can work 80 hours per month, select Month and enter <i>80</i> in Hours per Time Period.
Work Items per Time Period	The total service appointments that the resource can complete per time period. You must fill out this field, the Hours per Time Period field, or both.

Assigned Resource

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

Field Name	Description
Actual Travel Time (Minutes)	The actual travel time in minutes to the work site.
Assigned Resource Number	An auto-generated number identifying the assigned resource.
Estimated Travel Time (Minutes)	The estimated travel time in minutes to the work site. If the resource represents a crew, you can't track individual crew members' travel time unless you create an assigned resource record for each crew member.
Service Appointment	The related service appointment.
Service Crew	The service crew assigned to the appointment. Typically, appointments are assigned to crews by creating an assigned

Field Name	Description
	<p>resource record that links to the service crew record. If you're using that approach, you can leave the Service Crew field blank.</p> <p>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.</p> <p>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.</p>
Service Resource	The service resource assigned to the appointment.

Resource Preference

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

Field Name	Description
Preference Type	<ul style="list-style-type: none"> • Preferred: Indicates that the customer wants 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 doesn't want their field service work assigned to the resource <p>Resource preferences are suggestions, not requirements. You can assign a service appointment to any resource regardless of the related work order's resource preferences.</p>
Related Record	The work order or account with the resource preference.
Resource Preference Number	An auto-generated number identifying the resource preference.

Field Name	Description
Service Resource	The service resource that is preferred, required, or excluded.

SEE ALSO:


- [Create Service Resources for Field Service](#)
- [Guidelines for Creating Service Resources for Field Service](#)
- [Create Service Resources for Field Service](#)
- [Guidelines for Creating Service Resources for Field Service](#)
- [Create Resource Absences in the Field Service Mobile App](#)
- [Manage Field Service Resources](#)
- [Work Rule Type: Match Boolean](#)
- [Work Rule Type: Match Fields](#)
- [Create Service Resource Absences for Field Service](#)
- [Show Resource Absences on the Map](#)

Service Territory Fields for Field Service

Service territories, service territory members, and service territory locations have these fields. Sometimes fields aren't visible or editable depending on your page layout and field-level security settings.

Service Territory

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

Field Name	Description
Active	Indicates whether the service territory is meant to be used. If a territory is inactive, you can't add members to it or link it to work orders, work order line items, or service appointments.
Address	<p>An address to associate with the territory. For example, you can 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.</p> <p> Note: When defining an address, make sure that it's geocoded. Entering a street address can be a requirement.</p>

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Average Travel Time (in minutes)	The average travel time for the service territory in minutes. The value is added to the Work Capacity Usage for each scheduled service appointment in the service territory.
Description	The description of the territory.
Name	The name of the territory.
Operating Hours	The territory's operating hours, which indicate when service appointments within the territory occur. Service resources who are members of a territory automatically inherit the territory's operating hours unless different hours are specified on the service territory member record.
Parent Territory	The territory's parent service territory, if it has one. For example, a Northern California territory can have a State of California territory as its parent.
Top-Level Territory	(Read only) The top-level territory in a hierarchy of service territories. Depending on where a territory lies in the hierarchy, its top-level territory can be the same as its parent.
Travel Mode	The travel mode used for travel time calculations. The travel mode includes information about the type of transportation, such as a car or walking, whether a vehicle can take toll roads, and whether a vehicle is transporting hazardous materials.
Typical In-Territory Travel Time	Estimated number of minutes needed to travel from one location to another within the service territory. You can use this field in Apex customization.

Service Territory Member

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

Field Name	Description
Address	The member's address. For example, you can list the related service resource's address in this field.
End Date	The date when the service resource is no longer a member of the territory. If the resource is scheduled to work in the territory for the foreseeable future, leave this field blank. This field is useful for indicating when a temporary relocation ends.
Member Number	(Read only) An auto-generated number identifying the service territory member.
Operating Hours	The member's operating hours, which are inherited from the service territory.
Service Resource	The service resource assigned to the service territory.

Field Name	Description
Service Territory	The service territory that the service resource is assigned to.
Start Date	The date when the service resource becomes a member of the service territory.
Territory Type	<ul style="list-style-type: none"> • Primary: Where the resource works most often. For example, near their home base. Service resources can have only one primary territory at a given time. • 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. <p>For example, a service resource can have these territories.</p> <ul style="list-style-type: none"> • Primary territory: West Chicago • Secondary territories: <ul style="list-style-type: none"> – East Chicago – South Chicago • Relocation territory: Manhattan, for a 3-month period

Service Territory Location

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

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

SEE ALSO:

[Create Service Territories for Field Service](#)

[Guidelines for Creating Service Territories for Field Service](#)

[Create Service Territories for Field Service](#)

[Guidelines for Creating Service Territories for Field Service](#)

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.

Field Name	Description
Background Color	Color code shifts by adding a background color in hexadecimal format.
Created By	(Read Only) User who created the time sheet.
Created Date	(Read Only) Date the time sheet was created.
End Time	The date and time that the shift ends.
Holiday Shift	Indicates a shift that overlaps with holiday hours.
Job Profile	Job profile associated with the shift.
Label	The customizable label, or name, for the shift.
Last Modified By	(Read Only) User who last modified the time sheet.
Last Modified Date	(Read Only) Date the time sheet was last modified.
Non-Standard	Marks a shift as non-standard, such as evening or on-call shifts.
Owner Name	Shift owner.
Recordset Filter Criteria	Recordset filter criteria associated with the shift. Filter criteria can be used to match shift and service territory records against criteria you create.
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: <ul style="list-style-type: none"> • Tentative • Published • Confirmed
Status Category	The status of the shift using static values. This field is derived from the Status field using the

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
	mapping you define. The picklist includes the following values: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> Normal Extended

Shift Pattern Fields

Shift patterns and shift pattern entries have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Shift Patterns

Field Name	Description
Active	Marks the shift template active.
Description	Notes or context about the shift template.
Owner Name	The owner of the shift template.
Pattern Length	The number of days of the pattern.
Shift Pattern Name	The name of the shift pattern.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Shift Pattern Entries

Shift pattern entries link shift templates to the pattern.

Field Name	Description
Day Position	Applies the shift template to a specific day within the pattern.
Name	(Read only) Auto-generated number that identifies the shift pattern entry.
Shift Pattern	(Read only) The ID of the shift pattern.
Shift Template	(Read only) The ID of the linked shift template.

Shift Template Fields

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

Shift Templates

Field Name	Description
Active	Marks the shift template active.
Background Color	Color code shifts by adding a background color in hexadecimal format.
Description	Notes or context about the shift template.
Duration	The duration in hours of the shift.
Job Profile	The job profile assigned to the shift.
Non-Standard	Marks a shift as non-standard, such as evening or on-call shifts.
Owner Name	The owner of the shift template.
Shift Template ID	(Read only) The ID of the shift template.
Shift Template Name	The name of the shift template.
Start Time	The shift's start time.
Time Slot Type	Sets the shift's time slot type, either Normal or Extended. If no time slot type is selected, shifts created from the template are marked Normal.

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

 **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.

Field Name	Description
End Date	The date when the skill expires. For example, if a resource must be re-certified after six months, the end date would be the date their certification expires.
Service Resource	The resource who possesses the skill.
Skill	The skill the resource possesses.
Skill Level	The resource's skill level. Skill level can range from zero to 99.99.
Start Date	The date when the resource gains the skill. For example, if the skill represents a certification, the start date would be the date of certification.

Skill Requirement

Skill requirements are skills that a service resource needs to complete a task. They appear in the Skill Requirements related list on work type, work order, and work order line item detail pages.

Field Name	Description
Related Record	The work order, work order line item, or work type that the skill is required on.
Skill	The required skill.
Skill Level	The required skill level. Skill level can range from zero to 99.99.

SEE ALSO:

[Create Skills for Field Service](#)

[Add Required Skills to Work Orders or Work Types for Field Service](#)

[Create Skills for Field Service](#)

[Add Required Skills to Work Orders or Work Types for Field Service](#)

Time Sheet Fields

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

Time Sheet

Time sheets relate service resources with their time and attendance.

Field Name	Description
Created By	(Read Only) User who created the time sheet.
Created Date	(Read Only) Date the time sheet was created.
Last Modified By	(Read Only) User who last modified the time sheet.
Last Modified Date	(Read Only) Date the time sheet was last modified.
Name	Time sheet name.
Owner	Time sheet owner.
Service Resource	Service resource associated with the time sheet.
Status	The status of the time sheet. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • None • New • Submitted • Approved
Time Sheet End Date	The last day the time sheet covers.
Time Sheet Entry Count	(Read Only) The number of related time sheet entries.
Time Sheet Start Date	The first day the time sheet covers.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Time Sheet Entry

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

Field Name	Description
Created By	(Read Only) User who created the time sheet entry.
Created Date	(Read Only) Date the time sheet entry was created.

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

SEE ALSO:

[Create Time Sheet Templates](#)

[Create Time Sheet Templates](#)

[Use Time Sheets in the Field Service Mobile App](#)

Travel Mode Fields

Travel Modes have the following fields.

Field Name	Description
Can Use Toll Roads	Indicates if the vehicle is allowed to drive on toll roads. The default value is 'false'.
Is transporting Hazmat	Indicates if the vehicle is transporting hazardous materials. The default value is 'false'.
Name	Name of the Travel Mode.
Transport Type	Type of transportation. Possible values are: <ul style="list-style-type: none"> • Bicycle • Car • Heavy Truck • Light Truck • Walking

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Warranty Fields

Warranty terms, product warranty terms, and asset warranties have the following fields. Your page layout and field-level security settings can hide some fields and prevent you from editing others.

Warranty Term

Warranty terms let you define the labor, parts, and expenses covered, along with any exchange options provided to rectify issues with products.

Field Name	Description
Active	Defines whether the warranty term is active.
Code	A code or other identifier associated with this warranty term.
Description	Description of the warranty term.
Effective Start Date	Date when the warranty term became available: <ul style="list-style-type: none"> • InstallDate • ManufactureDate • PurchaseDate
Exchange Type	The type of exchange offered: <ul style="list-style-type: none"> • AdvanceExchange

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
	<ul style="list-style-type: none"> • Loaner • ReturnExchange
Exclusions	Description of any exclusions.
Expenses Covered	(Required) The percentage of expenses covered.
Expenses Covered Duration	(Required) The period that expenses are covered for.
Expenses Covered Unit of Time	(Required) The time measurement for expenses covered duration: <ul style="list-style-type: none"> • Days • Weeks • Months • Years
Labor Covered	(Required) The percentage of labor covered.
Labor Covered Duration	(Required) The period that labor is covered for.
Labor Covered Unit of Time	(Required) The time measurement for labor covered duration: <ul style="list-style-type: none"> • Days • Weeks • Months • Years
Owner	Warranty term owner.
Parts Covered	(Required) The percentage of parts covered.
Parts Covered Duration	(Required) The duration that parts are covered for.
Parts Covered Unit of Time	(Required) The time measurement for parts covered duration: <ul style="list-style-type: none"> • Days • Weeks • Months • Years
Price Book	The price book item associated with this warranty term.
Transferable	Defines whether the warranty can be transferred to a new owner.
Warranty Duration	The duration of the warranty offered by this term.
Warranty Term Name	The name of the warranty term.
Warranty Type	The type of warranty: <ul style="list-style-type: none"> • Repair • Standard • Supplier

Field Name	Description
Warranty Unit Of Time	The time measurement for warranty duration: <ul style="list-style-type: none"> • Days • Weeks • Months • Years

Product Warranty Term

A product warranty term identifies a warranty term that applies to a product or product family to create a standard warranty. When an asset is installed, it picks up the standard warranty terms defined for its product or product family.

Field Name	Description
Covered Product Family	(Required if Covered Product isn't defined.) The product family that the warranty term applies to.
Covered Product	(Required if Covered Product Family isn't defined.) The product that the warranty term applies to.
Product Warranty Term Number	(Read Only) The identifier for this product warranty term.
Warranty Term	The warranty term.

Asset Warranty Term

An asset warranty term lets you record any exclusions and extensions to a standard warranty term for an asset.

Field Name	Description
Asset	The asset this warranty term applies to.
Asset Warranty Number	(Read Only) The identifier of the asset warranty record.
End Date	The date when the warranty term expires.
Exchange Type	The type of exchange offered.
Exclusions	Description of any exclusions.
Expenses Covered	The percentage of expenses covered.
Expenses Covered End Date	The date when cover for expenses ends.
Labor Covered	The percentage of labor covered.
Labor Covered End Date	The date when cover for labor ends.
Parts Covered	The percentage of parts covered.
Parts Covered End Date	The date when cover for parts ends.

Field Name	Description
Price Book	The price book item associated with this warranty term.
Start Date	The date when cover under this warranty term starts.
Transferable	Defines whether the warranty can be transferred to a new owner.
Warranty Term	The warranty term this asset warranty term extends.
Warranty Type	The type of warranty.

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.




Field	Description
Account	The account associated with the work order.
Address	The compound form of the address where the work order is completed. The work order's service appointments and line items inherit its address, though the address on line items can be updated.
Asset	The asset associated with the work order.
Business Hours	The business hours associated with the work order.
Case	The case associated with the work order.
City	The city where the work order is completed. Maximum length is 40 characters.
Contact	The contact associated with the work order.
Country	The country where the work order is completed. Maximum length is 80 characters.
Currency ISO Code	Three-letter currency code. Available only if the multicurrency feature is enabled.
Description	The description of the work order. We recommend describing the steps a user takes to mark the work order Completed.
Discount	(Read Only) The weighted average of the discounts on all line items on the work order. It can be any positive number up to 100.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field	Description
Duration	The estimated time required to complete the work order. Specify the duration unit in the Duration Type field. Work order duration and work order line item duration are independent of each other. If you want work order duration to automatically show the sum of the work order line items' duration, replace the Duration field on work orders with a custom roll-up summary field.
DurationInMinutes	The estimated time required to complete the work order, in minutes. This field is for internal use.
Duration Type	The unit of the duration: Minutes or Hours.
End Date	The date when the work order is completed. This field is blank unless you set up automation to configure it. For a sample workflow rule that configures the Start Date field (a similar field), see Start Date.
Entitlement	The entitlement associated with the work order.
Entitlement Process End Time	The time the work order exits an entitlement process. If an entitlement process applies to a work order, this field appears.
Entitlement Process Start Time	The time the work order entered an entitlement process. If an entitlement process applies to a work order, this field appears.
Generated from maintenance plan	(Read Only) Indicates that the work order was generated from a maintenance plan rather than manually created. This option is deselected for work orders that were generated from maintenance plans before Summer '18.
Geocode Accuracy	The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
Grand Total	(Read Only) The total price of the work order with tax added.
Is Closed	Indicates whether the work order is closed. Use this field to report on closed versus open work orders.
Last Modified Date	The date when the work order was last modified.
Last Viewed Date	The date when the work order was last viewed.
Latitude	Used with Longitude to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between -90 and 90 with up to 15 decimal places.
Line Items	(Read Only) The number of work order line items on the work order.

Field	Description
Location	The location associated with the work order. For example, a work site.
Longitude	Used with Latitude to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between -180 and 180 with up to 15 decimal places.
Maintenance Plan	The maintenance plan associated with the work order. When the work order is auto-generated from a maintenance plan, this field automatically lists the related plan.
Maintenance Work Rule Id	(Read Only) ID of the maintenance work rule if the work order or work order line item was created by a maintenance plan. If created by the One Work Order Line Item per Asset option on the maintenance plan, the field is populated only on the work order line item.
Milestone Status	A milestone is a step in an entitlement process. It can have one of three statuses: Compliant, Open Violation, and Closed Violation. If an entitlement process applies to a work order, this field appears.
Milestone Status Icon	An icon that corresponds to the milestone status. <ul style="list-style-type: none"> •  Compliant •  Open Violation •  Closed Violation
Minimum Crew Size	The minimum crew size allowed for a crew assigned to the work order. If you're not using the Field Service 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.
Owner	The work order's assigned owner.
Parent Work Order	The work order's parent work order, if it has one. View, create, and delete a work order's child work orders in the Child Work Orders related list.
Postal Code	The postal code where the work order is completed. Maximum length is 20 characters.
Price Book	The price book associated with the work order. Adding a price book to the work order lets you assign different price book entries (products) to the work order's line items. This field is only available if products are enabled.

Field	Description
Priority	<p>The priority of the work order. The picklist includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • Low • Medium • High • Critical
Product Service Campaign	The product service campaign associated with the work order.
Product Service Campaign Item	The product service campaign item associated with the work order.
Recommended Crew Size	The recommended number of people on the service crew assigned to the work order.
Record Type	The record type associated with the work type.
Return Order	The return order associated with the work order.
Return Order Line Item	The return order line item associated with the work order.
Root Work Order	(Read Only) The top-level work order in a work order hierarchy. Depending on where a work order lies in the hierarchy, its root can be the same as its parent.
Service Appointment Count	The number of service appointments on the work order.
Service Contract	The service contract associated with the work order.
Service Report Language	<p>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.</p> <p>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.</p>
Service Report Template	<p>The service report template that the work order's service reports uses.</p> <p>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.</p> <p>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.</p>

Field	Description
Service Territory	The service territory where the work order is taking place.
Start Date	<p>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.</p> <p>The Start Date and End Date fields are blank by default, but you can set up workflow rules to configure them.</p>
State	The state where the work order is completed. Maximum length is 80 characters.
Status	<p>The status of the work order. The picklist includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • 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. <p>Changing a work order's status doesn't affect the status of its work order line items or associated service appointments.</p>
Status Category	<p>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.</p> <p>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.</p>
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.

Field	Description
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.
Work Order Number	An autogenerated number that identifies the work order.
Work Type	The work type associated with the work order. When a work type is selected, the work order automatically inherits the work type's Duration, Duration Type, and required skills.

SEE ALSO:

- [Create Field Service Work Orders](#)
- [Work Order Pricing Guidelines for Field Service](#)
- [Guidelines for Creating Work Orders for Field Service](#)
- [Set Up Work Order Management for Field Service](#)
- [Manage Field Service Work Orders](#)
- [Customize Work Order Settings for 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.


Field	Description
Address	The address of the line item. The line item inherits its address from its parent work order, but it can also be updated manually.
Asset	The asset associated with the line item. If your org uses hierarchical assets (available after Spring '16), you 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.
City	The city where the line item is completed. Maximum length is 40 characters.


EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field	Description
Country	The country where the line item is completed. Maximum length is 80 characters.
Currency ISO Code	The ISO code for any currency allowed by the organization. Available only for Salesforce orgs with the multicurrency feature enabled.
Description	The description of the line item. We recommend describing the steps for a user to follow to mark the line item Completed.
Discount	The percent discount to be applied to the line item. You can enter a number with or without the percent symbol and you can use up to two decimal places.
Duration	The estimated time required to complete the line item. Specify the duration unit in the Duration Type field.  Note: Work order duration and work order line item duration are independent of each other. If you want work order duration to automatically show the sum of the work order line items' duration, replace the Duration field on work orders with a custom roll-up summary field.
DurationInMinutes	The estimated time required to complete the line item, in minutes. This field is for internal use.
Duration Type	The unit of the duration: Minutes or Hours.
End Date	The date when the line item is completed.
Geocode Accuracy	The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
Is Closed	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.
Is Generated From Maintenance Plan	Identifies whether the work order line item is generated from a maintenance plan.
Last Referenced Date	The date when the line item was last modified. Its label in the user interface is <code>Last Modified Date</code> .
Last Viewed Date	The date when the line item was last viewed.
Latitude	Used with Longitude to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between -90 and 90 with up to 15 decimal places.
Line Item Number	An auto-generated number that identifies the line item.

Field	Description
List Price	The price of the line item (product) as listed in its corresponding price book entry. If a product isn't specified, the list price defaults to zero. (Read only)
Location	A location associated with the work order line item. For example, a work site.
Longitude	Used with Latitude to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between -180 and 180 with up to 15 decimal places.
Maintenance Plan	The maintenance plan associated with the work order line item.
Maintenance Work Rule Id	(Read Only) ID of the maintenance work rule if the work order or work order line item was created by a maintenance plan. If created by the One Work Order Line Item per Asset option on the maintenance plan, the field is populated only on the work order line item.
Minimum Crew Size	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.
Order	The order associated with the line item. For example, you order replacement parts before you can complete the line item.
Parent Work Order Line Item	The line item's parent line item, if it has one.  Tip: View, create, and delete a line item's child line items in the Child Work Order Line Items related list.
Postal Code	The postal code where the line item is completed. Maximum length is 20 characters.
Pricebook Entry	The price book entry (product) associated with the line item. The label in the user interface is <code>Product</code> . This field's lookup search only returns products that are included in the work order's price book.
Priority	The priority of the line item. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • Low • Medium • High • Critical

Field	Description
Product	The product (price book entry) associated with the line item. This field's lookup search only returns products that are included in the parent work order's price book.
Product Service Campaign	The product service campaign associated with the work order line item.
Product Service Campaign Item	The product service campaign item associated with the work order line item.
Quantity	The line item's quantity.
Recommended Crew Size	The recommended number of people on the service crew assigned to the line item.
Return Order	The return order associated with the work order line item.
Return Order Line Item	The return order line item associated with the work order line item.
Root Work Order Line Item	The top-level line item in a line item hierarchy. Depending on where a line item lies in the hierarchy, its root can be the same as its parent. (Read only)
Service Appointment Count	The number of service appointments on the work order line item.
Service Report Template	<p>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.</p> <p> 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.</p>
Service Territory	The service territory where the line item work is taking place.
Start Date	The date when the line item goes into effect.
State	The state where the line item is completed. Maximum length is 80 characters.
Status	<p>The status of the line item. The picklist includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • New—Line item was created, but there's no activity yet. • 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.



Field	Description
Status Category	<p>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.</p> <p>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.</p> <p>To learn which processes reference Status Category, see How are Status Categories Used?</p>
Street	The street number and name where the line item is completed.
Subject	The line item's subject. For example, Tire Check.
Subtotal	The line item's unit price multiplied by the quantity. (Read only)
Suggested Maintenance Date	Date when maintenance work is planned.
Total Price	The line item's subtotal with discounts applied. (Read only)
Unit Price	By default, the unit price for a line item is the product's list price from the price book, but you can change it.
Work Order	The parent work order of the line item. Because work order line items must be associated with a work order, this field is required.
Work Order Line Item Number	An autogenerated number that identifies the work order line item.
Work Type	The work type associated with the line item. When a work type is selected, the work order line item automatically inherits the work type's Duration, Duration Type, and required skills.

SEE ALSO:

- [Work Order Pricing Guidelines for Field Service](#)
- [Set Up Work Order Management for Field Service](#)
- [Manage Field Service Work Orders](#)
- [Customize Work Order Settings for Field Service](#)

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 Name	Description
Auto-Create Service Appointment	<p>Select to automatically create service appointments on work orders or work order line items that use the work type.</p> <p> Note:</p> <ul style="list-style-type: none"> 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). If a work type with the Auto-Create Service Appointment option selected is added to an existing work order or work order line item, a service appointment is only created for the work order or work order line item if it doesn't yet have one. If someone updates an existing work type by selecting the Auto-Create Service Appointment option, service appointments aren't created on work orders and work order line items that were already using the work type.
Description	The description of the work type. Try to add details about the task or tasks that this work type represents.
Duration Type	The unit of the Estimated Duration: Minutes or Hours.
Estimated Duration	The estimated length of the work. The estimated duration is in minutes or hours based on the value selected in the Duration Type field.
Exact Appointments	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.
Minimum Crew Size	<p>The minimum crew size allowed for a crew assigned to records using the work type.</p> <p>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.</p> <p> Note: This field is hidden for all users by default. To use it, update its field-level security settings and add it to your work type page layouts.</p>

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Field Name	Description
Name	The name of the work type. Try to use a name that helps users quickly understand the type of work orders that can be created from the work type. For example, "Annual Refrigerator Maintenance" or "Valve Replacement."
Recommended Crew Size	The recommended number of people on the service crew assigned to the record using this work type.  Note: This field is hidden for all users by default. To use it, update its field-level security settings and add it to your work type page layouts.
Service Report Template	The service report template associated with the work type. If you choose not to specify a service report template on a work order, it uses the service report template listed on its work type. If the work type doesn't list a template or no work type is specified, the work order uses the default service report template. The same is true for work order line items.

SEE ALSO:

[Create Work Types for Field Service](#)

[Guidelines for Creating Work Types for Field Service](#)

[Create Work Types for Field Service](#)

[Guidelines for Creating Work Types for Field Service](#)

[Add Required Skills to Work Orders or Work Types for Field Service](#)

Set Up Field Service Appointment Assistant

Appointment Assistant helps you keep track of your customers' service experience from the moment they contact you to the moment your mobile worker arrives.

Watch the video to see how Appointment Assistant keeps track of your customers' service experience.

 [Watch a video](#)

Watch the video to see how to modify the Appointment Assistant labels to better suit your company's culture.

 [Watch a video](#)

What Is Ethical Use?

Salesforce's Office of Ethical and Humane Use ensures that our technology is used to help, not harm, society and uphold the basic human rights of every human being. Its advisory council, composed of executive employees, academics, ethicists, industry experts, and society leaders, created a framework of Guiding Principles to guide processes for the ethical and humane use of Salesforce technology.

These are the principles.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

- Human Rights: We work to ensure the direct us of our technologies uphold equal and inalienable protections.
- Privacy: We push the frontier of privacy best practice in our product design to enable customers to protect individuals' data.
- Safety: We aim to protect humans from direct harm from the use of our technology.
- Honesty: We oppose the use of our technology to knowingly spread disinformation or conspiracy theories.
- Inclusion: We create opportunity through equal access to technology.

Salesforce Appointment Assistant was created with these guiding principles in mind. You can be sure safety considerations for your mobile workers and your customers, along with privacy and data protections and accessible access, are built into the product.

How Data Is Collected and Used

To learn how Salesforce protects and safely stores data that is gathered from the Field Service mobile app, see [Field Service Mobile Security](#).

[Before You Begin with Field Service Appointment Assistant](#)

Before you set up Appointment Assistant, follow these steps.

[Set Up Field Service Appointment Assistant Real-Time Location](#)

Appointment Assistant Real-Time Location integrates live tracking of Field Service mobile workers with Messaging to let customers know their mobile worker is on the way. Admins set appointment expirations to limit tracking of mobile workers and add worker identification like name and photo to provide safety for workers and customers while respecting their privacy.

[Set Up Field Service Appointment Assistant Self-Service Scheduling](#)

Let Field Service Appointment Assistant customers book, confirm, reschedule, or cancel their upcoming appointments. For Self-Service Scheduling, you only need one license per org assigned to one user.

[Set Up Field Service Appointment Assistant Contactless Signature](#)

Let your customers use their own device instead of the Field Service mobile worker's device to digitally sign service reports. Before you start setting up Contactless Signature, make sure that you have a service report template and a digital signature.

[Set Up Surveys for Field Service Appointment Assistant](#)

Send Salesforce Surveys to customers to get their feedback after an appointment. Salesforce Surveys requires a license that isn't integrated with the Appointment Assistant license. You can also choose to integrate with GetFeedback.

SEE ALSO:

[Custom Labels](#)

Before You Begin with Field Service Appointment Assistant

Before you set up Appointment Assistant, follow these steps.

[Install the Appointment Assistant Package](#)

Install the latest versions of the packages.

[Create an Experience Builder Site for Appointment Assistant](#)

To build a responsive web page for the Field Service Appointment Assistant components, first create an Experience Builder site.

[Set Up Digital Engagement for Appointment Assistant](#)

Salesforce Digital Engagement, which is an optional purchase, works seamlessly with Field Service Appointment Assistant when sending SMS notifications and using messaging apps like WhatsApp to update customers. However, you don't need Digital Engagement to use Appointment Assistant. Instead, you can send customer messages through other channels such as email.

Install the Appointment Assistant Package

Install the latest versions of the packages.

To install the latest versions of the Salesforce Field Service Managed Package and Appointment Assistant, see [Field Service Package Installation Hub](#).

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience


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

The Field Service Appointment Assistant managed package and permission set license are required.

Create an Experience Builder Site for Appointment Assistant

To build a responsive web page for the Field Service Appointment Assistant components, first create an Experience Builder site.


1. Enable Digital Experiences in your Salesforce org.
2. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
3. Click **New**.
4. Follow the instructions for [setting up an Experience Cloud site](#).

 **Note:** When selecting an Experience Cloud template, don't use the Lightning Web Runtime (LWR) templates.

Set Up Digital Engagement for Appointment Assistant

Salesforce Digital Engagement, which is an optional purchase, works seamlessly with Field Service Appointment Assistant when sending SMS notifications and using messaging apps like WhatsApp to update customers. However, you don't need Digital Engagement to use Appointment Assistant. Instead, you can send customer messages through other channels such as email.

To use Digital Engagement, see [Set Up Messaging Channels](#).

 **Note:** For information on the features included in the Digital Engagement subscription, see our [pricing docs](#).

Unused conversations and triggered and bulk messages are forfeited at the subscription's end date. To purchase additional conversations or triggered and bulk messages, contact your Salesforce representative.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To create, customize, or publish a site:

- Create and Set Up Experience Sites AND View Setup and Configuration

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

Set Up Field Service Appointment Assistant Real-Time Location

Appointment Assistant Real-Time Location integrates live tracking of Field Service mobile workers with Messaging to let customers know their mobile worker is on the way. Admins set appointment expirations to limit tracking of mobile workers and add worker identification like name and photo to provide safety for workers and customers while respecting their privacy.

Watch the video to see how to give customers better insight into their mobile worker's location while waiting for their appointments.

 [Watch a video](#)

Appointment Assistant Real-Time Location gives customers temporary, live tracking of Salesforce Field Service mobile workers.

These are some of the benefits.

- Customers get SMS notifications as the mobile worker approaches the job location, giving them time to prepare for the service appointment.
- Mobile workers know customers are expecting them, cutting down on no-shows and ensuring customers are ready for their appointments.
- Companies can deliver more proactive and personalized service to their customers.
- Customers, workers, and companies can trust that Appointment Assistant Real-Time Location follows Salesforce's [Ethical Use Principles](#), which guide how we ensure the privacy and safety of both mobile workers and customers.

[Assign a Permission Set for Appointment Assistant Real-Time Location](#)

You can use this permission set for the Field Service mobile workers and the Field Service admins. For Appointment Assistant Real-Time Location, each mobile worker needs the Appointment Assistant license to share their location with customers when they're on their way to the appointment.

[Configure Geolocation Settings for Appointment Assistant Real-Time Location](#)

To give customers better insight into their mobile worker's location while waiting for their appointments, make sure your geolocation settings are set up.

[Add Real-Time Location to Your Experience Builder Site](#)

To enable Appointment Assistant Real-Time Location, add it to your Experience Builder site.

[Give Guest Users Site Access for Real-Time Location](#)

Guest users can view your Experience Builder site without logging in. All guest visitors to a public site share the same guest user record (one per site) and have the same access level.

[Configure Field Service Settings for Real-Time Location](#)

Allow worker tracking and customer messaging in your Field Service settings.

[Create Message Templates for Real-Time Location](#)

Create message templates for Field Service Appointment Assistant that let customers know when their mobile worker is on the way and when the mobile worker is approaching the work site.

[Create Flows to Send Messages for Real-Time Location](#)

Streamline your messaging process for Field Service Appointment Assistant by setting up flows that use the messaging templates that you created.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

Add Real-Time Location to the Service Appointment Layout for Back-Office Users

Display the Appointment Assistant Real-Time Location component in the service appointment layout. This view lets your admins, dispatchers, and agents see the same ETA, map view, and mobile worker's details that your customers can see. The component is displayed as the team member travels to the customer, until arrival.

SEE ALSO:

[Trailhead: Real-Time Location in Appointment Assistant](#)

Assign a Permission Set for Appointment Assistant Real-Time Location

You can use this permission set for the Field Service mobile workers and the Field Service admins. For Appointment Assistant Real-Time Location, each mobile worker needs the Appointment Assistant license to share their location with customers when they're on their way to the appointment.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Permission Sets**.
2. Create a permission set.
 - a. Click **New**.
 - b. For Label, enter the name of the permission set, for example, *Appointment Assistant*.
 - c. Click the API Name field to populate it.
 - d. For License, select **Field Service Appointment Assistant**.

The screenshot shows the 'Create' page for a new Permission Set in Salesforce. The page is titled 'Permission Sets' and 'Create'. It has two main sections: 'Enter permission set information' and 'Select the type of users who will use this permission set'. In the first section, the 'Label' field is filled with 'Appointment Assistant' and the 'API Name' field is filled with 'Appointment_Assistant'. There is a 'Description' field which is empty. Below this is a 'Session Activation Required' checkbox which is unchecked. In the second section, there is a question 'Who will use this permission set?' followed by three bullet points: '-Choose "-None-" if you plan to assign this permission set to multiple users with different user and permission set licenses.', '-Choose a specific user license if you want users with only one license type to use this permission set.', and '-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.' Below this is a link 'Learn more here.' and a 'License' dropdown menu which is currently set to 'Field Service Appointment Assistant'. At the bottom of the form are 'Save' and 'Cancel' buttons.

The Field Service Appointment Assistant license is an add-on license. If the license isn't available for selection, ask your account executive for help.

3. Save the permission set.
4. Enable the permission set.
 - a. From Setup, in the Quick Find box, enter *Users*, and then select **Permission Sets**.
 - b. Open the Appointment Assistant permission set that you created.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

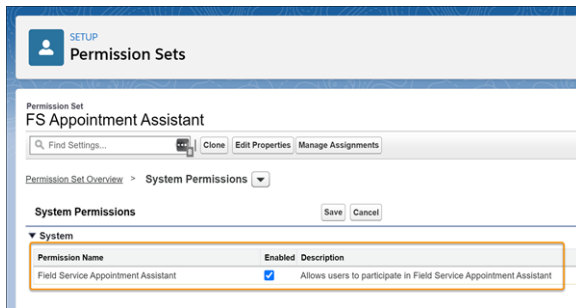
The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To create permission sets:

- Manage Profiles and Permission Sets

- c. In System, click **System Permissions**.
- d. Click **Edit** and enable the Field Service Appointment Assistant permission.



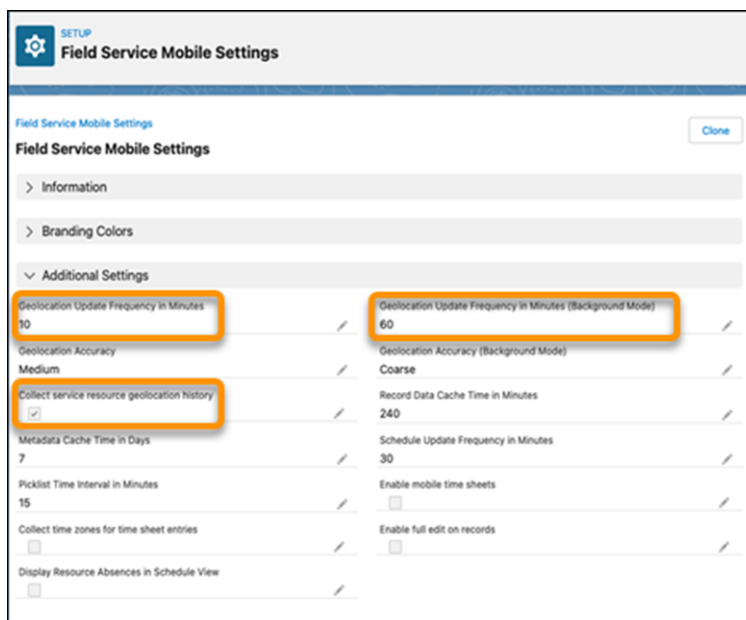
- e. Save your changes.
5. Assign this permission set to each mobile worker.

Configure Geolocation Settings for Appointment Assistant Real-Time Location

To give customers better insight into their mobile worker's location while waiting for their appointments, make sure your geolocation settings are set up.

Geolocation settings are used for additional purposes in the Field Service mobile app, so it's likely they're set up. To verify setup, follow these steps.

1. Open Field Service Mobile Settings.
2. Make sure that the **Collect service resource geolocation history** option is enabled.
3. Make sure that values are entered for the Geolocation Update Frequency in Minutes and Geolocation Update Frequency in Minutes (Background Mode) settings.



EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To configure resource tracking:

- Customize Application


Important: Mobile worker locations are shared during travel to the customer until arrival. While the location is shared, geolocation settings are overridden and get updated every 60 seconds.

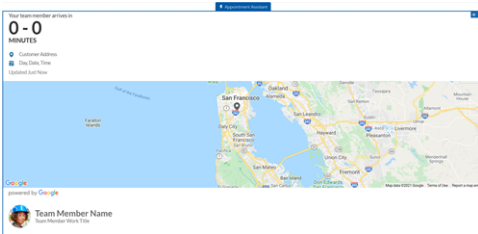
SEE ALSO:

[Track Service Resource Geolocation with the Field Service Mobile App](#)

Add Real-Time Location to Your Experience Builder Site

To enable Appointment Assistant Real-Time Location, add it to your Experience Builder site.

1. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
2. In the row for your site, click **Builder**.
3. From Experience Builder, click **Components** .
4. From Custom Components, locate the Real-Time Location component.
5. Drag the component onto the site.



If you can't see the map in the Appointment Assistant component, add the URL to your trusted URLs. See [Manage Trusted URLs](#).

 **Note:** For the LWR Experience Cloud Site template, the map isn't fully supported.

[Manage What Customers See About Field Service Mobile Workers](#)

You can control how much information is shared about your mobile workers and their location.

[Add Custom Icons to the Real-Time Location Component](#)

Add your own icons to mark the team member's and the customer's locations on the map.

[Set Up Masked Phone Calls for Real-Time Location](#)

Using masked phone calls requires setting up Service Cloud Voice with Amazon Connect.

[Let Customers Reschedule and Cancel Appointments in the Real-Time Location Component](#)

Let your customers reschedule and cancel appointments even if the mobile worker is on the way to the appointment.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To add components to sites:

- Create and Set Up Experience Sites AND View Setup and Configuration

Manage What Customers See About Field Service Mobile Workers

You can control how much information is shared about your mobile workers and their location.

1. To open the settings panel, click anywhere in the Real-Time Location component.

2. Select what information to show the customers.
 - Show time estimate—Information related to the service appointment address, the appointment start and end times, and the estimated arrival time. Estimated arrival time is calculated based on the mobile worker's current location relative to the service appointment location. The estimated arrival time is available from 12 hours before the appointment and is refreshed every 5 minutes.
 - Show map—A map with the mobile worker's location and the service appointment location. The map is refreshed every 60 seconds.
 - Show team member's exact location—When selected, the team member's exact location is shown. Otherwise, the worker's location is shown within a 500-meter radius.
 - Show team member's info—The mobile worker's first name, the first initial of their last name, and their title.
 - Show team member's image—The mobile worker's Chatter picture that's saved in Salesforce.
 - Show Call button—Give your customers a button for calling the team member directly. The phone number is from the Phone field of the user that's connected to the service resource. If the phone number isn't populated, the Call button doesn't appear.
 - Let customers reschedule appointments and Let customers cancel appointments—Customers can reschedule and cancel appointments even if the mobile worker is on the way to the appointment. See [Let Customers Reschedule and Cancel Appointments in the Real-Time Location Component](#).

If you use all the options, your customer sees something like this.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

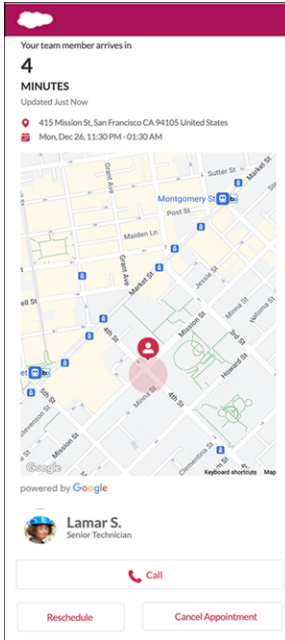
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To customize component settings:

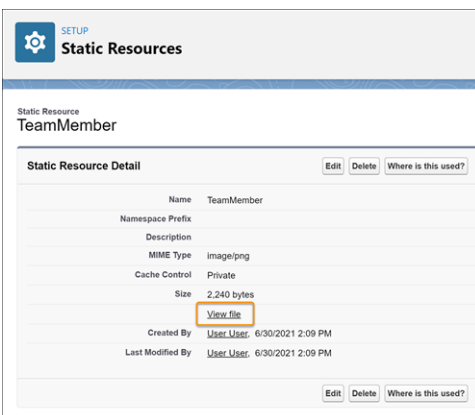
- Create and Set Up Experience Sites AND View Setup and Configuration



Add Custom Icons to the Real-Time Location Component

Add your own icons to mark the team member's and the customer's locations on the map.

1. From Setup, in the Quick Find box, enter `Custom Code`, and then select **Static Resources**.
2. Click **New**.
3. Name the resource, and choose a file that contains the icon that you want to use for the team member's location.
4. For Cache Control, select **Private**.
5. Save your changes.
6. In the new static resource, click **View File**.



7. Copy the URL from the browser's address bar.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To customize component settings:

- Create and Set Up Experience Sites AND View Setup and Configuration

8. In the Real-Time Location's component settings, paste the URL into the URL for the Team Member's Marker field.
9. Repeat this procedure for the customer's location marker.

Real-Time Location

- Show time estimate
- Show map
- Show team member's exact location
- URL for the Team Member's Marker
- URL for the Customer's Marker
- Show team member's info
- Show team member's image
- Show Call button
- Amazon Connect Phone Number
- Let customers reschedule appointments
- Let customers cancel appointments
- URL for Self-Service Scheduling

Set Up Masked Phone Calls for Real-Time Location

Using masked phone calls requires setting up Service Cloud Voice with Amazon Connect.

1. Set up Service Cloud Voice with Amazon Connect.
 - a. [Turn on Service Cloud Voice](#).
 - b. [Confirm your tax registration number](#).
 - c. [Assign contact center permission sets](#).
 - d. [Create a Service Cloud Voice contact center](#).
2. Set up the contact flow and the lambda function.
 - a. From Setup, in the Quick Find box, enter *voice*, and then select **Amazon Contact Centers**.
 - b. Open your contact center.
 - c. Make sure that your contact center is on version 9.0 or above. See [Service Cloud Voice Contact Center Updates](#).
3. Create a phone number.
 - a. Set up your contact center phone number in Amazon Connect. See [Manage Your Contact Center in Amazon Connect](#).
 - b. Connect the phone number to the flow: Sample SVC Field Service Phone Call Subflow.
 - c. Copy the Amazon Connect phone number, and paste it in the Amazon Connect Phone Number field of the Real-Time Location component settings. Make sure the Show Call button is also selected.

Real-Time Location

Show time estimate

Show map

Show team member's exact location

URL for the Team Member's Marker

URL for the Customer's Marker

Show team member's info

Show team member's image

Show Call button

Amazon Connect Phone Number

Let customers reschedule appointments

Let customers cancel appointments

URL for Self-Service Scheduling

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Appointment Assistant managed package and permission set license are required. You also need Service Cloud Voice with the Amazon Connect license.

USER PERMISSIONS

To view the Amazon Setup page:

- Customize Application

To turn on Service Cloud Voice:


- Customize Application

Let Customers Reschedule and Cancel Appointments in the Real-Time Location Component

Let your customers reschedule and cancel appointments even if the mobile worker is on the way to the appointment.

1. To open the settings panel, click anywhere in the Real-Time Location component.
2. Select **Let customers reschedule appointments** and **Let customers cancel appointments**.
3. In URL for Self-Service Scheduling, enter the URL of the page where your self-service scheduling component is located.

To find this URL:

- a. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
 - b. In the row of the required Experience site, click **Builder**.
 - c. In Experience Builder, click Settings .
 - d. Copy the URL from the Publish Status. Make sure that the specific page is included in the URL.
4. Enable the notification delivery channels.
 - a. From Setup, in the Quick Find box, enter *Notification Builder*, and then select **Notification Delivery Settings**.
 - b. From Custom Notification Types, edit Appointment Assistant Custom Notifications.
 - c. Select **Salesforce Field Service for Android** and **Salesforce Field Service for iOS**. If you can't see these options, install the connected apps.
 5. Mobile workers are notified when appointments are rescheduled or canceled. If you want to disable the notifications, follow these steps.
 - a. From Setup, in the Quick Find box, enter *Process Automation*, and then select **Flows**.
 - b. Open the Self-Service Scheduling Notifications flow.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To customize component settings:

- Create and Set Up Experience Sites AND View Setup and Configuration


- c. Click **Deactivate**.

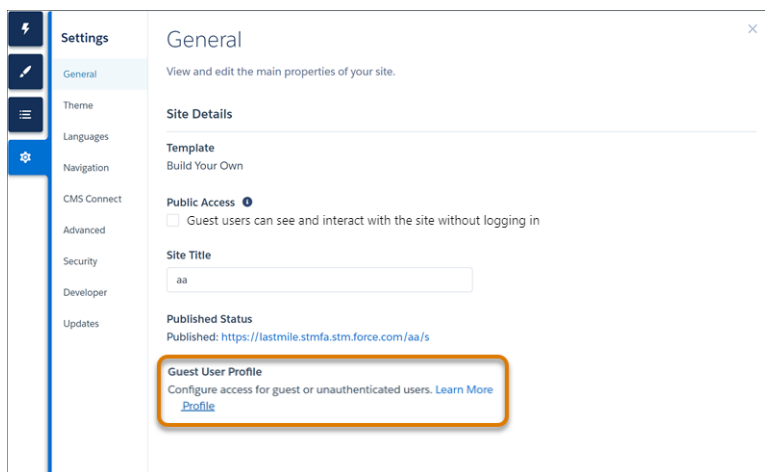
SEE ALSO:

[Downloading the Field Service Connected App](#)


Give Guest Users Site Access for Real-Time Location

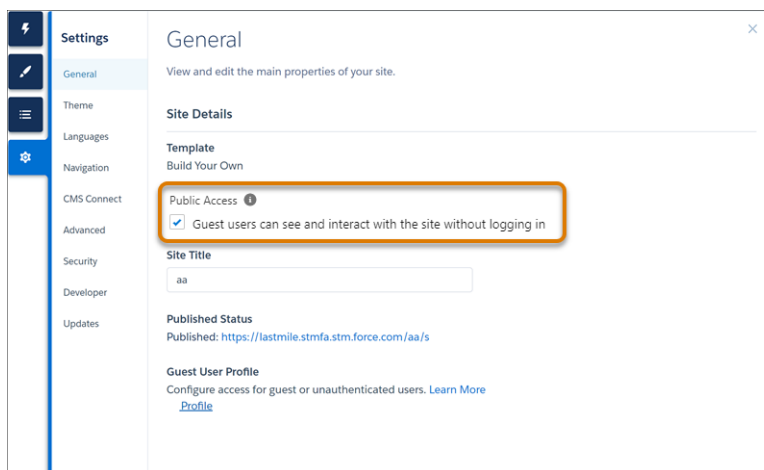
Guest users can view your Experience Builder site without logging in. All guest visitors to a public site share the same guest user record (one per site) and have the same access level.

1. In Experience Builder, click **Settings** .
2. In Guest User Profile, click **<Your Site Name> Profile**.



3. From Profiles, click **View Users** and click the user's name.
4. From Permission Set Assignments, click **Edit Assignments**.
5. Add **Appointment Assistant Guest Permissions**.

 **Note:** For guest users, be sure to enable public access.



EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS


To create, customize, or publish a site:

- Create and Set Up Experience Sites AND View Setup and Configuration

Configure Field Service Settings for Real-Time Location

Allow worker tracking and customer messaging in your Field Service settings.

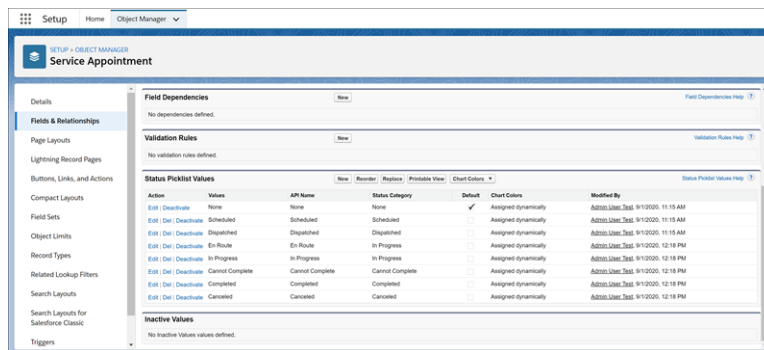
1. From Setup, in the Quick Find box, enter *Field Service*, and then select **Field Service Settings**.
2. Scroll to the Appointment Assistant section.
3. In the Status field, select the service appointment status that generates the first platform event. For example, if the status is set to En Route, Appointment Assistant Real-Time Location sends a notification to the customer that the mobile worker is on their way.

 **Note:** The customer can see the mobile worker's location and information only when the appointment is in this status.


If you don't use an En Route status, you can create it or use an existing status but only if its purpose is to indicate that a worker is en route.

To view and edit the Status Picklist Values:

- a. From Setup, go to the Object Manager tab.
- b. Click **Service Appointment**.
- c. In Fields & Relationships, click **Status**.



4. In the Site URL field, paste the URL of the Experience Builder site that contains the Appointment Assistant Real-Time Location Lightning Web Component.
5. Enter a value for the Appointment Assistant Radius. This value generates the second platform event. For example, let's say that the radius is set to 2 miles. When the mobile worker is within 2 miles of the service appointment, Appointment Assistant Real-Time Location sends a notification to the customer that the mobile worker is nearing the appointment location.

 **Tip:** You can use an online conversion tool to calculate your Radius Field value. For example, you could use the conversion 2,640 feet = 0.5 miles.

6. Enter a value for the Appointment Assistant Expiration. For example, if the expiration is set to 1 hour, the customer stops seeing the mobile worker's location and information 1 hour after the link was generated.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant permission set license must be assigned to mobile workers.

USER PERMISSIONS

To configure Appointment Assistant settings:

- Field Service Appointment Assistant

Appointment Assistant ⓘ

Enable Appointment Assistant through Experience Cloud Sites

Appointment Assistant Status Update
The value that prompts the first event for Appointment Assistant.

Status

Appointment Assistant ETA URL
Paste the Site URL to enable Appointment Assistant.

Site URL

Appointment Assistant Radius ⓘ
The radius of the service appointment that prompts the second event for Appointment Assistant.

Value
 Units

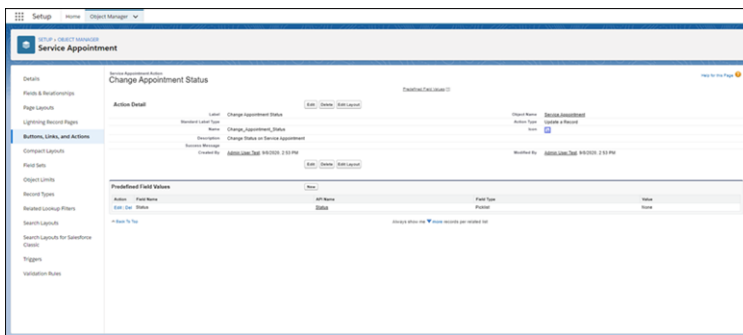
Appointment Assistant Expiration ⓘ
Stops the customer from seeing the mobile worker's location.

Hours
 Minutes

7. Fill in the rest of the fields.



Tip: Create a quick action on the Service Appointment object so that a mobile worker can easily mark En Route in the Field Service mobile app. For Appointment Assistant Real-Time Location to work, the change of status must occur on the mobile app and not on the server side. For example, flows aren't supported for this purpose. When the service appointment status changes to En Route on the mobile app, the location status of the assigned service resource changes to EnRoute.



Note: If you're using Appointment Assistant Real-Time Location and Automatic Status Change, it's recommended to enter a small radius in the Automatic Status Change settings. A small radius ensures that Appointment Assistant's Real-Time Location customers can see the mobile worker's location up until the worker's close to the appointment. See [Set Up Automatic Status Change](#).

SEE ALSO:

- [Create the Salesforce Action and Add It to an Object](#)
- [Apply the Action to the Object's Page Layout](#)
- [Set Up Automatic Status Change](#)

Create Message Templates for Real-Time Location

Create message templates for Field Service Appointment Assistant that let customers know when their mobile worker is on the way and when the mobile worker is approaching the work site.

1. From Setup, in the Quick Find box, enter *Messaging*, and then select **Messaging Templates**.
2. To create the En Route template, click **New**.
3. In the Information area, enter the template name, developer name, and the message that the customer receives.
4. Add the URL placeholder to your message. The URL enables customers to navigate to the Experience Builder site that you configured for appointment details and arrival information.
 - a. For Related To, select one of the options.
 - b. For Field, select **Appointment Assistant Info URL**.
 - c. Click **Insert**. The URL placeholder is added to the message. For example, if you selected Assigned Resource in the Related To list, the URL placeholder looks like this:

```
{!AssignedResource.ApptAssistantInfoUrl}
```
5. In the Channels area, select one or more channels.
6. Save your changes.
7. Repeat these steps to create another template that lets customers know when their mobile worker is approaching the work site. Just change the template name and the message that you send to your customers. For example, change the message to “Your mobile worker is nearing the work site” or something similar.

SEE ALSO:

[Set Up WhatsApp in Messaging](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.



USER PERMISSIONS

To create message templates:

- Configure Messaging

Create Flows to Send Messages for Real-Time Location

Streamline your messaging process for Field Service Appointment Assistant by setting up flows that use the messaging templates that you created.

1. From Setup, in the Quick Find box, enter *Process Automation*, and then select **Flows**.
2. To Create the En Route flow, click **New Flow**.
3. Select **Record-Triggered Flow**, and click **Create**.
4. In the Configure Start window:
 - a. In Object, enter *Assigned Resource*.
 - b. In Trigger the Flow When, select **A record is updated**.
 - c. In Condition Requirements, select **All Conditions Are Met (AND)**.
 - d. For Field, enter *LocationStatus*.
 - e. For Operator, select **Equals**.
 - f. For Value, enter *EnRoute*.
 - g. In When to Run the Flow for Updated Records, select **Only when a record is updated to meet the condition requirements**.
 - h. Click **Done**.
5. To add an element to the flow, hover over , and click .
6. Under Interaction, select **Action**.
7. In the Action field, enter *Messaging Notification*.
8. Fill in these fields:
 - Label—A name you choose
 - API Name—A name you choose
 - Messaging Channel Unique Name—Developer name of your Messaging channel
 - Messaging Template Unique Name—Developer name of the Messaging template that you created for En Route messages
 - Context Record ID—The Assigned Resource ID
 - Recipient Phone Number—The contact phone number used for sending the message
 - Recipient Record ID—The contact Record ID
9. Turn on these options to include them.
 - Context Record ID
 - Recipient Phone Number
 - Recipient Record ID
10. Click **Done**.
11. Save and activate the flow.
12. To create the Approaching Messages flow, repeat these steps with a few changes.
 - a. In step 4:
 - In Condition Requirements, select **All Conditions Are Met (AND)**.
 - For Field, enter *LocationStatus*.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


Available only if Digital Engagement is enabled.

USER PERMISSIONS


To open, edit, or create a flow in Flow Builder:

- Manage Flow

- For Operator, select **Equals**.
 - For Value, enter *LastMile*.
- b. In step 7:
- In Messaging Template Unique Name, enter the developer name of the Messaging template that you created for Approaching messages.
 - In Messaging Channel Unique Name, enter the developer name of your Approaching Messaging channel.

 **Tip:** To help troubleshoot flows, turn on flow debug logs.

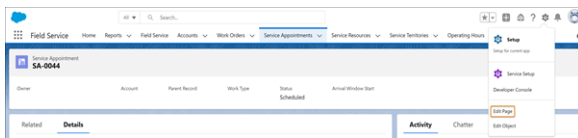
 **Tip:** For an optimal customer experience, ensure that you use complete addresses.

 **Note:** The limit for active flows per flow type is 2,000.


Add Real-Time Location to the Service Appointment Layout for Back-Office Users


Display the Appointment Assistant Real-Time Location component in the service appointment layout. This view lets your admins, dispatchers, and agents see the same ETA, map view, and mobile worker's details that your customers can see. The component is displayed as the team member travels to the customer, until arrival.

1. Add the component to the service appointment layout.
 - a. In Service Appointments, open one of the appointments.
 - b. Click the settings icon and select **Edit Page**.



- c. In Lightning App Builder, drag the **Real-Time Location** component onto the layout.

 **Tip:** If you're using an Experience site custom template, the component can appear too large and include a scroll bar. You can change the size of the component in the service appointment layout to fix its appearance.

- d. Save your changes.
2. Allow the display of the component on the service appointment layout.
 - a. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
 - b. In the row for your site, click **Builder**.
 - c. In Experience Builder, click **Settings** .
 - d. Click **Security & Privacy**.
 - e. For Clickjack Protection Level, select **Allow framing by any page**.
 - f. Publish the Experience Builder site.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience


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

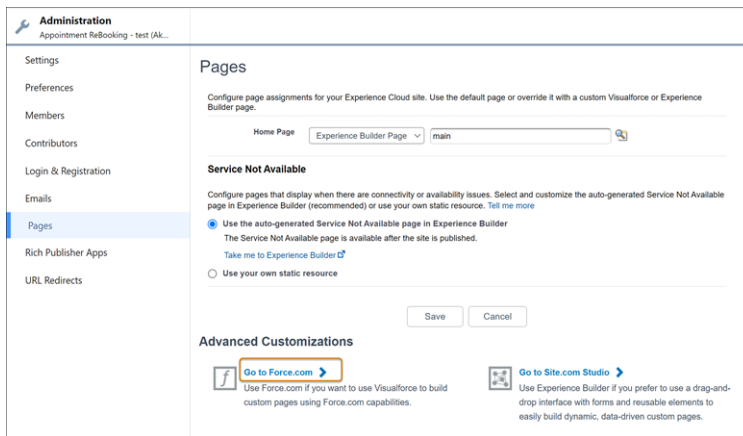
The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To configure layouts:

- Customize Application

3. If the component appears as a gray screen, modify the Clickjack protection level.
 - a. In Experience Builder, click  and select **Administration**.
 - b. Click **Pages**.
 - c. Under Advanced Customization, click **Go to Force.com**.



- d. From Site Detail, click **Edit**.
- e. For Clickjack Protection Level, select **Allow framing by any page (No protection)**.
- f. Save your changes.
- g. Publish the Experience Builder site again.

Set Up Field Service Appointment Assistant Self-Service Scheduling

Let Field Service Appointment Assistant customers book, confirm, reschedule, or cancel their upcoming appointments. For Self-Service Scheduling, you only need one license per org assigned to one user.

Appointment Assistant Self-Service Scheduling doesn't fully support Complex work.

- Using the Immediately Followed By dependency while rescheduling the primary service appointment returns all available slots, but it schedules the current service appointment without the dependent service appointment.
- Using the Same Start Time dependency returns only one slot, the slot of the dependent service appointment.

[Before You Begin with Self-Service Scheduling](#)

Before you set up Appointment Assistant Self-Service Scheduling, follow these steps.

[Set Up Appointment Assistant Self-Service Scheduling for New Appointments](#)

Let your customers book their own appointments.

[Set Up Appointment Assistant Self-Service Scheduling For Existing Appointments](#)

Let your customers confirm, reschedule, or cancel their upcoming appointments.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

Before You Begin with Self-Service Scheduling

Before you set up Appointment Assistant Self-Service Scheduling, follow these steps.

[Assign a Permission Set for Appointment Assistant Self-Service Scheduling](#)

You can use this permission set for Field Service mobile workers and Field Service admins. For Appointment Assistant Self-Service Scheduling, you need only one Appointment Assistant license per Salesforce org to book or reschedule appointments.

[Set Up the Experience Site for Self-Service Scheduling Authenticated Users](#)

Contacts can view your Experience Site to book, reschedule, cancel, and confirm their appointments after logging in.

[Set Up the Experience Site for Self-Service Scheduling Guest Users](#)

Guest users can view your Experience Builder site without logging in. All guest visitors to a public site share a guest user record, one per site, and have the same access level.

Assign a Permission Set for Appointment Assistant Self-Service Scheduling

You can use this permission set for Field Service mobile workers and Field Service admins. For Appointment Assistant Self-Service Scheduling, you need only one Appointment Assistant license per Salesforce org to book or reschedule appointments.

1. From Setup, in the Quick Find box, enter *users*, and then select **Permission Sets**.
2. Create a permission set.
 - a. Click **New**.
 - b. For Label, enter the name of the permission set, for example, *Appointment Assistant*.
 - c. Click the API Name field to populate it.
 - d. For License, select **Field Service Appointment Assistant**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To create permission sets:

- Manage Profiles and Permission Sets

The screenshot shows the 'Permission Sets' page in Salesforce Setup. The 'Create' form is displayed with the following fields and options:

- Label:** Appointment Assistant
- API Name:** Appointment_Assistant
- Description:** (Empty text area)
- Session Activation Required:**
- Select the type of users who will use this permission set:**
 - Who will use this permission set?
 - Choose "--None--" if you plan to assign this permission set to multiple users with different user and permission set licenses.
 - Choose a specific user license if you want users with only one license type to use this permission set.
 - Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
 - Not sure what a permission set license is? [Learn more here.](#)
 - License:** Field Service Appointment Assistant

The Field Service Appointment Assistant license is an add-on license. If the license isn't available for selection, ask your account executive for help.

- e. Save the permission set.
3. Enable the permission set.
 - a. Open the Appointment Assistant permission set that you created.
 - b. In System, click **System Permissions**.
 - c. Click **Edit** and enable the Field Service Appointment Assistant permission.

The screenshot shows the 'System Permissions' section for the 'FS Appointment Assistant' permission set. The 'Field Service Appointment Assistant' permission is highlighted with an orange box and is enabled.

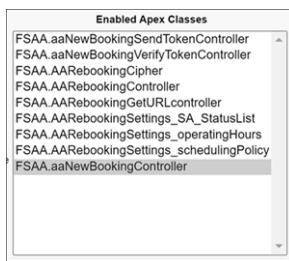
Permission Name	Enabled	Description
Field Service Appointment Assistant	<input checked="" type="checkbox"/>	Allows users to participate in Field Service Appointment Assistant

- d. Save your changes.
4. Assign this permission set to one of the admin users.

Set Up the Experience Site for Self-Service Scheduling Authenticated Users

Contacts can view your Experience Site to book, reschedule, cancel, and confirm their appointments after logging in.

1. From Setup, in the Quick Find box, enter *users*, and then select **Users**.
2. Select the contact user and add permissions.
 - a. In Permission Set License Assignments, enable the **Field Service Standard** permission.
 - b. In Permission Set Assignments, add **Field Service Self Service Permissions**.
3. From the user profile, enable the Apex classes.
 - a. Go to Enabled Apex Class Access, and click **Edit**.
 - b. Add these Apex classes:



4. From the user profile, enable access to the flows.
 - a. Go to Enabled Flow Access, and click **Edit**.
 - b. Add your Self-Service Scheduling flows to the enabled flows.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Standard license is required.


USER PERMISSIONS

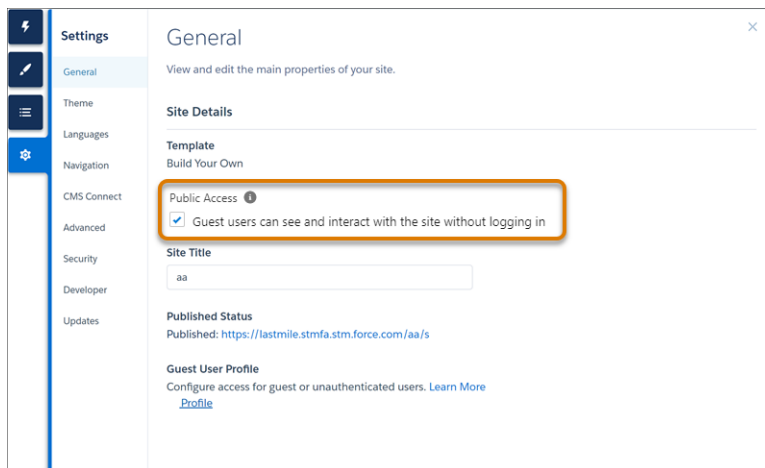
To create, customize, or publish a site:

- Create and Set Up Experience Sites AND View Setup and Configuration

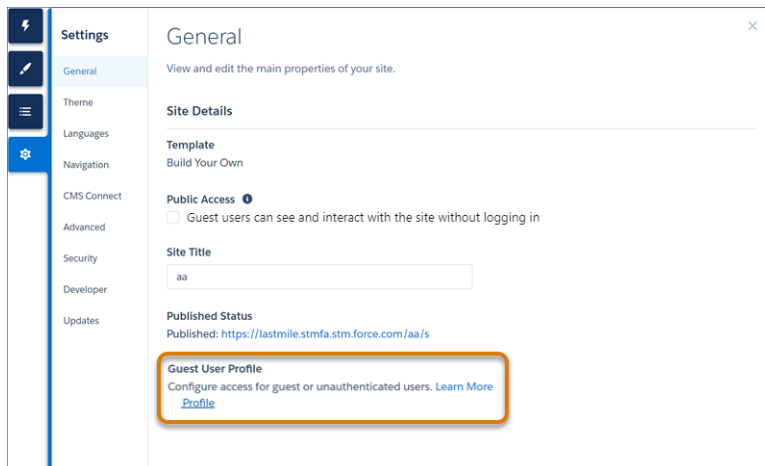
Set Up the Experience Site for Self-Service Scheduling Guest Users

Guest users can view your Experience Builder site without logging in. All guest visitors to a public site share a guest user record, one per site, and have the same access level.

1. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
2. In the row for your site, click **Builder**.
3. In Experience Builder, click **Settings** .
4. Enable public access.



5. In Guest User Profile, click **<Your Site Name> Profile**.



6. From the guest user profile, add permissions.
 - a. Click **View Users**, and then click the user's name.
 - b. In Permission Set License Assignments, click **Edit Assignments**, and enable **Field Service Guest User**. Then, save your changes.
 - c. In Permission Set Assignments, click **Edit Assignments**, and add **Field Service Guest User Permissions** to the enabled permission sets. Then, save your changes.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Guest User license is required.

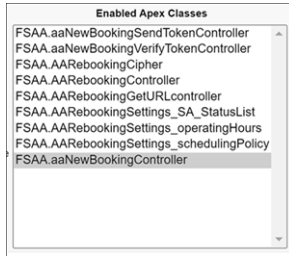
USER PERMISSIONS

To create, customize, or publish a site:

- Create and Set Up Experience Sites AND View Setup and Configuration

If Field Service Guest User Permissions doesn't appear in the list, see [Create Field Service Permission Sets](#).

7. From the guest user profile, enable the Apex classes.
 - a. Go to Enabled Apex Class Access, and click **Edit**.
 - b. Add these Apex classes:



 **Note:** Make sure that the guest user has access to these objects.

- Assets: Read
- Contacts: Read
- Locations: Read
- Operating Hours: Read
- Recordset Filter Criteria: Read
- Service Appointments: Read, Create
- Service Crews: Read
- Service Resource Preferences: Read
- Service Resources: Read
- Service Territories: Read
- Service Territory Member: Read
- Shifts: Read
- Work Orders: Read, Create
- Work Type Groups: Read
- Work Types: Read

Set Up Appointment Assistant Self-Service Scheduling for New Appointments

Let your customers book their own appointments.

[Create a Message Template for the Self-Service Scheduling Flow for New Appointments](#)

Create a template for the message sent to customers with the verification code.

[Set Up the Self-Service Scheduling Authentication Flow](#)

Determine the details of the authentication flow that is connected to the main flow that lets your customers book new appointments.

[Set Up the Self-Service Scheduling Flow](#)

Configure the details of the main flow that lets your customers book new appointments.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

Create a Message Template for the Self-Service Scheduling Flow for New Appointments

Create a template for the message sent to customers with the verification code.

1. From Setup, in the Quick Find box, enter *Messaging*, and then select **Messaging Templates**.
2. Click **New**.
3. In the Information area, enter the template name, developer name, and an optional description.
4. In Insert Merge Field, create a custom field on the contact object or use an existing field.
 - a. For Related To, select **Contact**.
 - b. For Field, select a text custom field or an existing field to update with a random 6-digit code.
 - c. Click **Insert**.
5. Enter your message. Make sure to include the placeholder for the verification code. For example: Your access code is: `{!Contact.CustomField__c}`. To book your appointment, we must confirm that this is you. Enter the code to continue.
6. In the Channels area, select one or more channels.
7. Save your changes.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Available only if Digital Engagement is enabled.

USER PERMISSIONS

To create a message template:

- Configure Messaging

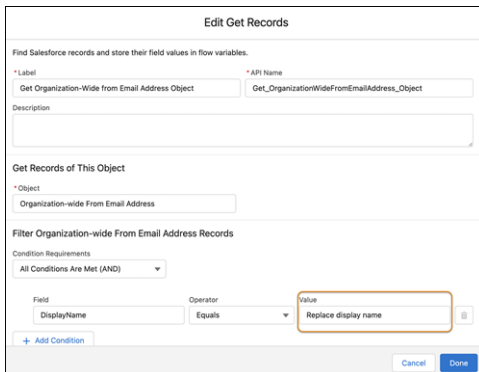
Set Up the Self-Service Scheduling Authentication Flow

Determine the details of the authentication flow that is connected to the main flow that lets your customers book new appointments.


Watch the video to see how to determine the details of the authentication flow that is connected to the main flow that lets your customers book new appointments.



 [Watch a video](#)

1. From Setup, in the Quick Find box, enter *Process Automation*, and then select **Flows**.
2. Open the Self-Service Scheduling Authentication template.
3. Click **Save As** and create your own version of the flow based on the template.
4. To use the email channel for authentication:
 - a. To modify the default text of the email, open the EmailSubject and EmailBody variables and modify the text as needed.
 - b. In the Get Records element, enter your organization-wide email address as the value of the DisplayName field.



The screenshot shows the 'Edit Get Records' configuration interface. It includes sections for 'Find Salesforce records and store their field values in flow variables', 'Get Records of This Object', and 'Filter Organization-wide From Email Address Records'. The filter section is active, showing a condition where the 'DisplayName' field is set to 'Equals' the value 'Replace display name'.

 **Tip:** To find the required email address, from Setup, in the Quick Find box, enter *Email*, and then select **Organization-Wide Addresses**. If the address isn't set up, see [Organization-Wide Email Addresses](#).

5. To use the SMS channel for authentication, add the Update Records component.
 - a. To add an element to the flow, hover over , and click .
 - b. Under Data, select **Update Records**.
 - c. Enter a name for the label. API Name is populated based on the label name.
 - d. Under How to Find Records to Update and Set Their Values, select **Specify conditions to identify records, and set fields individually**.
 - e. Under Update Records of This Object Type, for Object, select **Contact**.
 - f. To check if the user is new or an existing contact based on the mobile phone number that they entered, under Filter Contact Records, enter the match criteria.
 - For Condition Requirements, select **All Conditions Are Met (AND)**.
 - For Field, enter *MobilePhone*.
 - For Operator, select **Equals**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience





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

Available only if Digital Engagement is enabled.

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

- For Value, select **MobilePhoneNumber**.
- g. Under Set Field Values for the Contact Records:
- For Field, select the same field that you used in the messaging template to hold the 6-digit code. See [Create a Message Template for the Self-Service Scheduling Flow for New Appointments](#).
 - For Value, select **AccessCode**.
- h. Click **Done**.
6. To enable sending an SMS, add the Messaging Notification action.
- a. To add an element to the flow, hover over , and click .
- b. Under Interaction, select **Action**.
- c. For Action, select **Messaging Notification**.
- d. Enter a name for the label. API Name is populated based on the label name.
- e. For Messaging Channel Unique Name, enter the messaging channel's developer name.
- f. For Messaging Template Unique Name, enter the messaging template's developer name.
- g. Include the Context Record ID, and then select **SMScontactID** `{!$SMScontactID}`.
- h. To send the code to the phone number that the user entered, include the Recipient Phone Number, and then select **MobilePhoneNumber** `{!$MobilePhoneNumber}`.
- i. Include the Recipient Record ID, and then select **SMScontactID** `{!$SMScontactID}`.
- j. Click **Done**.
-  **Note:** We recommend not making any other changes to this flow.
7. Save and activate the flow.
8. Control the access to the flow.
- a. From Flows, click the arrow next to your flow, and select **Edit Access**.
- b. Select **Override default behavior and restrict access to enabled profiles or permission sets**.
- c. Add the required profiles.
- d. Save your changes.
9. From the guest user profile, enable access to the flows.
- a. Go to Enabled Flow Access, and click **Edit**.
- b. Add your Self-Service Scheduling flows to the enabled flows.
-  **Note:** To control user permissions to run flows, see [How Does Flow Security Work?](#)

Set Up the Self-Service Scheduling Flow


Configure the details of the main flow that lets your customers book new appointments.

Watch the video to see how to configure the details of the main flow that lets your customers book new appointments.

 [Watch a video](#)

1. From Setup, in the Quick Find box, enter *Process Automation*, and then select **Flows**.
2. Open the Self-Service Scheduling template.
3. To create your own version of the flow based on the template, click **Save As**, and add the required details.
4. Use the flow as is, or modify your version according to your needs. You can modify these settings.

 **Important:** Don't modify fields marked as Locked.

- Authentication Channel component
 - Authenticate by Email and Authenticate by Mobile Phone—If you want to provide only one authentication method, set one of these settings to false.
 - Authentication Flow—Enter the developer name of the Self-Service Scheduling Authentication flow that you created. See [Set Up the Self-Service Scheduling Authentication Flow](#).
- Authentication component
 - Minutes Until Resend is Available—Specify the number of minutes after customers open the web page when they can request another access code.
- Get Work Types component—Filter the work types presented to your customers.
- Get Operating Hours component—Enter the name of the required Operating Hours record.
- Get Scheduling Policy component—Enter the name of the Scheduling Policy record that defines the length of the appointment slots.
- Work Types component
 - Work Type Details—Enter the API name of the field that stores the work type details. The default is Description.
 - Work Type Title—Enter the API name of the field that stores the work type title. The default is Name.
- Location component
 -  **Tip:** You can manage service appointment assignments to territories with [polygons](#) or by adding another screen to the flow that includes the territory record.
 - Show Current Location Button—Let customers set their geolocation when they tap Use My Current Location.
- Appointment Selection component
 - Scheduling Horizon Units and Number of Scheduling Horizon Units—Shows customers a scheduling calendar based on your specification of the number of days, weeks, or months. The slots available for selection range from the earliest start permitted to the earliest end date. The end date is either the due date or the end of the scheduling horizon, whichever one is earlier. For best practices about the due date in auto-created service appointments, see [Work Type Fields for Field Service](#).
 - Show Exact Appointment Times—To show exact appointment times, enter `true`. To show arrival windows, enter `false`. Make sure to enter the same value in the Summary component.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS


To open, edit, or create a flow in Flow Builder:

- Manage Flow

- Service Territory ID—Leave blank if you use polygons or other automatic flows to assign service territories. If your Self-Service Scheduling flow includes service territory selection, enter a service territory ID.
- Summary component
 - Show Exact Appointment Times—To show exact appointment times, enter `true`. To show arrival windows, enter `false`. Make sure to enter the same value in the Appointment Selection component.



Note: A default page title is provided with the package for each Lightning web component. If you want to replace the default with your own text, enter it in the Page Title field in each component.


5. Save and activate the flow.
6. Control the access to the flow.
 - a. From Flows, click the arrow next to your flow and select **Edit Access**.
 - b. Select **Override default behavior and restrict access to enabled profiles or permission sets**.
 - c. Add the required profiles.
 - d. Save your changes.
7. Add the flow to your Experience Builder site.
 - a. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
 - b. In the row for your site, click **Builder**.
 - c. In Experience Builder, click **Components** .
 - d. From Process Automation, drag the Flow component onto the site.
 - e. To open the settings panel, click anywhere in the component.
 - f. In Flow, select your Self-Service Scheduling flow.



Tip: To eliminate the border that appears around the flow, in Theme, click the arrow in the top right and select **Edit CSS**. In the Override CSS window, click **Use Overrides**. Then, in the Edit CSS window, enter this code:

```
.slds-p-horizontal-medium{
margin: 0;
padding: 0;
}
.comm-layout-column{
margin: 0 !important;
padding: 4px !important;
}
.forceCommunityFlowCommunity{
border: none !important;
}
```

- g. Publish the site.
8. From the guest user profile, enable access to the flows.
 - a. Go to Enabled Flow Access, and click **Edit**.
 - b. Add your Self-Service Scheduling flows to the enabled flows.

 **Note:** To control user permissions to run flows, see [How Does Flow Security Work?](#)

SEE ALSO:

[Customize Appointment Booking Settings](#)

Set Up Appointment Assistant Self-Service Scheduling For Existing Appointments

Let your customers confirm, reschedule, or cancel their upcoming appointments.

[\(Optional\) Add Notes to the Service Appointment Layout](#)

To let your mobile workers see notes from customers, add the Service Notes field to the layout for mobile workers.

[\(Optional\) Add a Service Appointment Status for Confirmed Appointments](#)

Add a Confirmed status to the Service Appointment Status options. If you enter this status in the Appointment Assistant Self-Service Scheduling settings, when the customers confirm their appointments, the service appointment's status changes accordingly.

[Configure Appointment Assistant Settings for Self-Service Scheduling](#)

Make sure that the Appointment Assistant settings are configured.

[Add Self-Service Scheduling to Your Experience Builder Site](#)

To enable Appointment Assistant Self-Service Scheduling, add it to your Experience Builder site.

[Enable Customers to Cancel Appointments with Self-Service Scheduling](#)

To enable customers to cancel their appointments in the Appointment Assistant Self-Service Scheduling screen, you must disable the option for mentioning an assigned user when the service appointment is dispatched.

[Create a Message Template for the Self-Service Scheduling Authentication Flow for Existing Appointments](#)

Create templates for messages that let customers open the Appointment Assistant Self-Service Scheduling page.

[Create Flows to Send Messages for Self-Service Scheduling](#)

Streamline your messaging process by setting up flows that use the messaging templates that you created.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

(Optional) Add Notes to the Service Appointment Layout

To let your mobile workers see notes from customers, add the Service Notes field to the layout for mobile workers.

1. From Setup, go to the Object Manager tab.
2. In the Quick Find box, enter *Service Appointment*, and then select **Service Appointment**.
3. In Page Layouts, edit the layout used for the Field Service mobile workers.
4. Add the Service Note field to the layout.
5. Save the layout.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To configure layouts:

- Customize Application

(Optional) Add a Service Appointment Status for Confirmed Appointments

Add a Confirmed status to the Service Appointment Status options. If you enter this status in the Appointment Assistant Self-Service Scheduling settings, when the customers confirm their appointments, the service appointment's status changes accordingly.

1. Add the new status.
 - a. From Setup, go to the Object Manager tab.
 - b. In the Quick Find box, enter *Service Appointment*, and then select **Service Appointment**.
 - c. Click **Fields & Relationships**.
 - d. In the Quick Find box, enter *Status*, and then select **Status**.
 - e. In Status Picklist Values, click **New**.
 - f. Enter the details of the Confirmed status.
 - g. Save the new status.
2. If your Salesforce org uses status transitions:
 - a. From Field Service Admin, go to the Field Service Settings tab.
 - b. From Service Appointment Life Cycle, go to Status Transitions.
 - c. Add the flows for the Confirmed status.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To configure statuses:

- Customize Application

Configure Appointment Assistant Settings for Self-Service Scheduling

Make sure that the Appointment Assistant settings are configured.

1. Check if Appointment Assistant is configured in your org.
 - a. From Setup, in the Quick Find box, enter *Field Service*, and then select **Field Service Settings**.
 - b. If the Appointment Assistant section is filled in, you're all set.
2. If it isn't configured, see [Configure Field Service Settings for Real-Time Location](#).

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.


USER PERMISSIONS

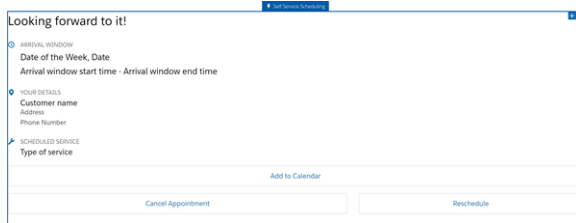
To configure the Appointment Assistant settings:

- Field Service Appointment Assistant

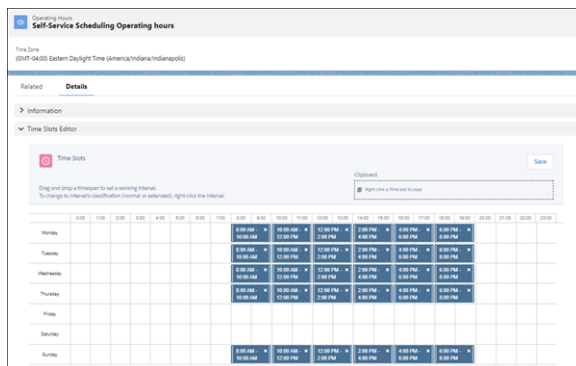
Add Self-Service Scheduling to Your Experience Builder Site

To enable Appointment Assistant Self-Service Scheduling, add it to your Experience Builder site.

1. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
2. In the row for your site, click **Builder**.
3. From Experience Builder, click **Components** .
4. From Custom Components, locate the Self-Service Scheduling component.
5. Drag the component onto the site.



6. To open the settings panel, click anywhere in the Appointment Assistant Self-Service Scheduling component.
7. In Operating Hours, select the record that defines the appointment slots. For example, in this Operating Hours record, the company has 3-hour slots on Mondays and Wednesdays, and 2-hour slots on Tuesdays, Thursdays, and Sundays.



8. In *Statuses That Allow Rescheduling*, enter statuses that aren't pinned.
9. Fill in the remaining settings. Your selections are reflected in the preview of the component.

 **Note:** The service appointment's territory time determines the time zone. If the service appointment's territory time is empty, the end user's time zone is used.

10. Publish the site.

SEE ALSO:

[Customize Appointment Booking Settings](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

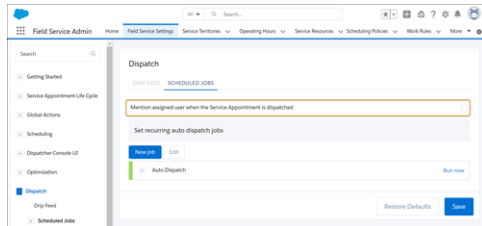
To add components to sites:

- Create and Set Up Experience Sites AND View Setup and Configuration

Enable Customers to Cancel Appointments with Self-Service Scheduling

To enable customers to cancel their appointments in the Appointment Assistant Self-Service Scheduling screen, you must disable the option for mentioning an assigned user when the service appointment is dispatched.

1. In Field Service Admin, open the Field Service Settings tab.
2. Under Dispatch, select **Scheduled Jobs**.
3. Disable the **Mention assigned user when the Service Appointment is dispatched** option.



4. Save your changes.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To configure the Appointment Assistant settings:

- Field Service Admin

Create a Message Template for the Self-Service Scheduling Authentication Flow for Existing Appointments

Create templates for messages that let customers open the Appointment Assistant Self-Service Scheduling page.

1. From Setup, in the Quick Find box, enter *Messaging*, and then select **Messaging Templates**.
2. To create the confirmation template, click **New**.
3. In the Information area, enter the template name, developer name, and the message that the customer receives.
4. Add the URL placeholder to your message. The URL enables customers to navigate to the Experience Builder site you configured.
 - a. For Related To, select Service Appointment.
 - b. For Field, select **Appointment Booking URL**.
 - c. Click **Insert**. The URL placeholder is added to the message. For example, if you selected Service Appointment in the Related To list, the URL placeholder looks like this:


```
{!ServiceAppointment.ApptBookingInfoUrl}
```
5. In the Channels area, select one or more channels.
6. Save your changes.

Create Flows to Send Messages for Self-Service Scheduling

Streamline your messaging process by setting up flows that use the messaging templates that you created.

1. From Setup, in the Quick Find box, enter *Process Automation*, and then select **Flows**.
2. Click **New Flow**.
3. Select **Record-Triggered Flow**, and then click **Create**.
4. Set up the service appointment conditions that send the URL. For example, to send the URL when a service appointment moves to the Scheduled status, in the Configure Start window:
 - a. In Object, enter *Service Appointment*.
 - b. In Trigger the Flow When, select **A record is updated**.
 - c. In Condition Requirements, select **All Conditions Are Met (AND)**.
 - d. Set the Condition Requirements.
 - In Field, enter *Status*.
 - In Operator, select **Equals**.
 - In Value, enter *Scheduled*.
 - e. In When to Run the Flow for Updated Records, select **Only when a record is updated to meet the condition requirements**.
 - f. To run the flow after the record is saved, select to optimize the flow for **Actions and Related Records**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Available only if Digital Engagement is enabled.

USER PERMISSIONS

To create message templates:

- Configure Messaging

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Available only if Digital Engagement is enabled.

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

g. Click **Done**.

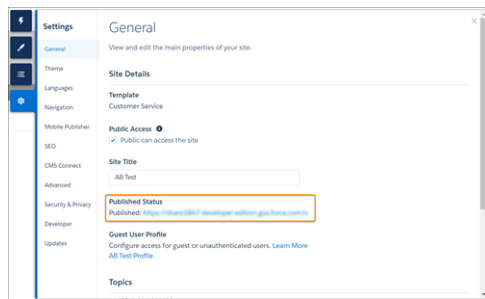
5. Add new resources that connect between the community URL, Service Appointment ID, and URL expiration time.

a. From the Toolbox, click **New Resource**, and then create a variable for the URL input.

- In Resource Type, select **Variable**.
- Enter an API name.
- In Data Type, select **Text**.
- In Default Value, enter the link to the Experience Builder site, followed by these characters: `/?guestToken=#!{$Record.Id}#[Time in Hours]`

 **Note:** The [Time in Hours] indicates how long the URL is valid for from the time it's generated.

 **Tip:** To make sure that the link to the Experience Builder site is accurate, copy it from the Experience Builder settings.



- In Availability Outside the Flow, select **Available for input**.



- Click **Done**.

b. Click **New Resource** again, and then create a variable for the URL output.

- In Resource Type, select **Variable**.
- Enter an API name.
- In Data Type, select **Text**.
- In Availability Outside the Flow, select **Available for input and Available for output**.

- Click **Done**.



6. Add the Apex action.

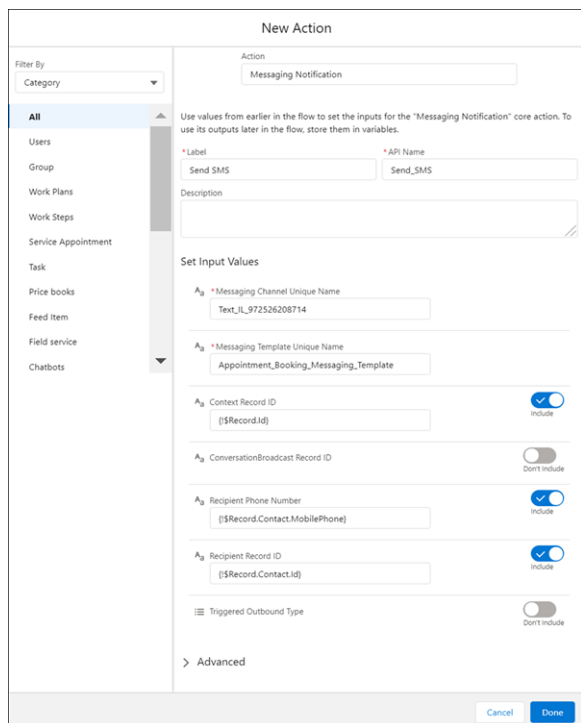
- To add an element to the flow, hover over , and click .
- Under Interaction, select **Action**.
- In the Action field, enter `FSAA.AARebookingGetURLcontroller`.
- Enter a name for the Label. The API Name is automatically populated accordingly.
- In Set Input Values:
 - Include the valueFromFlow option.
 - Select the URL input variable that you created in step 5.
- Under Advanced:
 - Select **Manually assign variables**.
 - In the output field, select the URL output variable that you created in step 5.

- Click **Done**.

7. Add the Update Records component.

- To add an element to the flow, hover over , and click .

- b. Under Data, select **Update Records**.
 - c. Enter a name for the Label. The API Name is automatically populated accordingly.
 - d. Under Set Field Values for the Service Appointment Record:
 - In Field, select **ApptBookingInfoUrl**.
 - In Value, select the URL output variable that you created in step 5.
 - e. Click **Done**.
8. Add the Messaging Notification action.
- a. To add an element to the flow, hover over , and click .
 - b. Under Interaction, select **Action**.
 - c. In the Action field, enter *Messaging Notification*.
 - d. Enter a name for the Label. The API Name is automatically populated accordingly.
 - e. For Messaging Channel Unique Name, enter the messaging channel's developer name.
 - f. For Messaging Template Unique Name, enter the messaging channel's developer name.
 - g. Include the Context Record ID option, and then select **Record** and **Id** `{!$Record.Id}`.
 - h. Include the Recipient Phone Number, and then select **Record**, **Contact**, and **Mobile Phone** `{!$Record.Contact.MobilePhone}`.
 - i. Include the Recipient Record ID, and then select **Record**, **Contact**, and **Id** `{!$Record.Contact.Id}`.



The screenshot shows the 'New Action' configuration interface. The 'Action' field is set to 'Messaging Notification'. The 'Label' is 'Send SMS' and the 'API Name' is 'Send_SMS'. The 'Set Input Values' section includes:

- Messaging Channel Unique Name:** Text_IL_972526208714
- Messaging Template Unique Name:** Appointment_Booking_Messaging_Template
- Context Record ID:** {\$Record.Id} (Include)
- ConversationBroadcast Record ID:** (Don't include)
- Recipient Phone Number:** {\$Record.Contact.MobilePhone} (Include)
- Recipient Record ID:** {\$Record.Contact.Id} (Include)
- Triggered Outbound Type:** (Don't include)

At the bottom of the screen, there are 'Cancel' and 'Done' buttons.

- j. Click **Done**.
9. Save and activate the flow.
- To help troubleshoot flows, turn on flow debug logs.

- For an optimal customer experience, use complete addresses.
- The limit for active flows per flow type is 2,000.

Set Up Field Service Appointment Assistant Contactless Signature

Let your customers use their own device instead of the Field Service mobile worker's device to digitally sign service reports. Before you start setting up Contactless Signature, make sure that you have a service report template and a digital signature.



This is a Field Service mobile app feature.

[Create Permission Sets for Appointment Assistant Contactless Signature](#)

You can use this permission set for the Field Service mobile workers and the Field Service admins. For Appointment Assistant Contactless Signature, each mobile worker needs the Field Service Appointment Assistant permission set license to share the service report with the customer.

[Configure Appointment Assistant Settings for Contactless Signature](#)

Make sure that the Appointment Assistant settings are configured.

[Add Contactless Signature to Your Experience Builder Site](#)

To enable Appointment Assistant Contactless Signature, add it to your Experience Builder site.

[Create a Sharing Rule for Contactless Signature](#)

Add a sharing rule to share service report records with the guest users.

[Create a Message Template for Contactless Signature](#)

Create a template for the message sent to customers for signing the service report.

[Set Up Contactless Signature Flows](#)

Create your own version of the flows based on the templates in the Appointment Assistant package.

[Add a Quick Action for Contactless Signature](#)

Create an action to send customers a link to the Contactless Signature page.

[Expose the Document Recipient Object's Status Field](#)

The Document Recipient object's Status field must be visible for the Contactless Signature flow.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

SEE ALSO:

[Create Service Report Templates](#)

Create Permission Sets for Appointment Assistant Contactless Signature

You can use this permission set for the Field Service mobile workers and the Field Service admins. For Appointment Assistant Contactless Signature, each mobile worker needs the Field Service Appointment Assistant permission set license to share the service report with the customer.

1. From Setup, in the Quick Find box, enter `users`, and then select **Permission Sets**.
2. Create the permission set.
 - a. Click **New**.
 - b. For Label, enter the name of the permission set, for example, *Appointment Assistant*.
 - c. Click the API Name field to populate it.
 - d. For License, select **Field Service Appointment Assistant**.

The screenshot shows the 'Create' page for a new Permission Set in Salesforce. The page title is 'Permission Sets' with a 'SETUP' icon. Below the title, it says 'Permission Set Create'. There are 'Save' and 'Cancel' buttons at the top right. The main section is 'Enter permission set information' and contains the following fields:

- Label:** Appointment Assistant
- API Name:** Appointment_Assistant
- Description:** (Empty text area)
- Session Activation Required:**

Below this section is 'Select the type of users who will use this permission set'. It includes instructions: '-Choose "-None-" if you plan to assign this permission set to multiple users with different user and permission set licenses.', '-Choose a specific user license if you want users with only one license type to use this permission set.', and '-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.' There is a link 'Learn more here.' and a 'License' dropdown menu currently set to 'Field Service Appointment Assistant'. 'Save' and 'Cancel' buttons are at the bottom.

The Field Service Appointment Assistant license is an add-on license. If the license isn't available for selection, ask your account executive for help.

- e. Save the permission set.
3. Enable the permission set.
 - a. Open the Appointment Assistant permission set that you created.
 - b. In System, click **System Permissions**.
 - c. Click **Edit**, and enable the Field Service Appointment Assistant permission.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

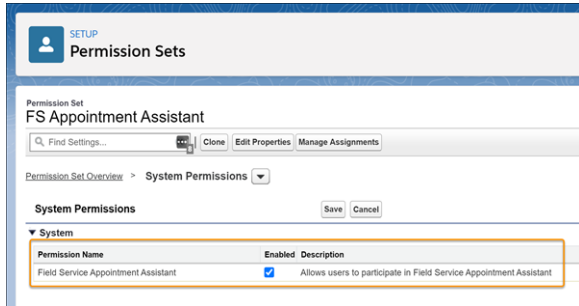
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To create permission sets:

- Manage Profiles and Permission Sets



- d. Save your changes.
4. Assign the permission set to each mobile worker.

Configure Appointment Assistant Settings for Contactless Signature

Make sure that the Appointment Assistant settings are configured.

1. Check if Appointment Assistant is configured in your org.
 - a. From Setup, in the Quick Find box, enter *Field Service*, and then select **Field Service Settings**.
 - b. If the Appointment Assistant section is filled in, you're all set.
2. If it isn't configured, see [Configure Field Service Settings for Real-Time Location](#).

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.


USER PERMISSIONS

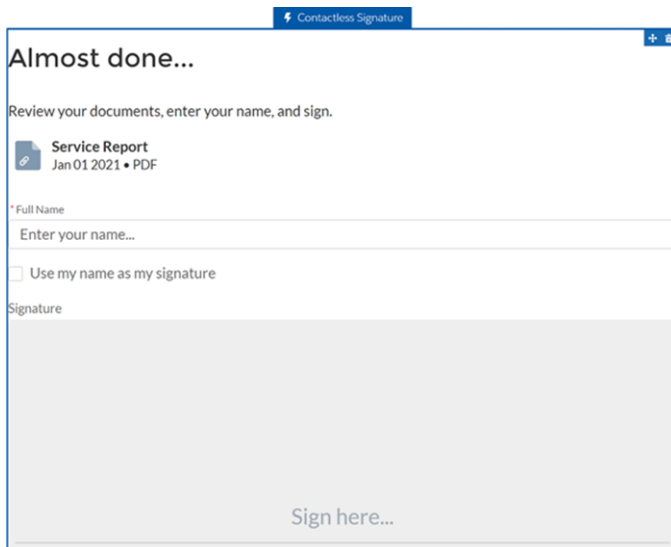
To configure the Appointment Assistant settings:

- Field Service Appointment Assistant

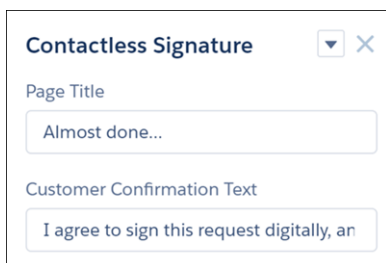
Add Contactless Signature to Your Experience Builder Site


To enable Appointment Assistant Contactless Signature, add it to your Experience Builder site.

1. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
2. In the row for your site, click **Builder**.
3. Add the Contactless Signature component.
 - a. From Experience Builder, click **Components** .
 - b. From Custom Components, locate the Contactless Signature component.
 - c. Drag the component onto the site.



- d. To open the settings panel, click anywhere in the Contactless Signature component.



- e. A default page title is provided. To use your own text, enter it in the Page Title field.
 - f. For Customer Confirmation Text, review the suggested text, and replace it as needed.
4. Enable guest user permissions.
 - a. From Experience Builder, click **Settings** .
 - b. Enable public access.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

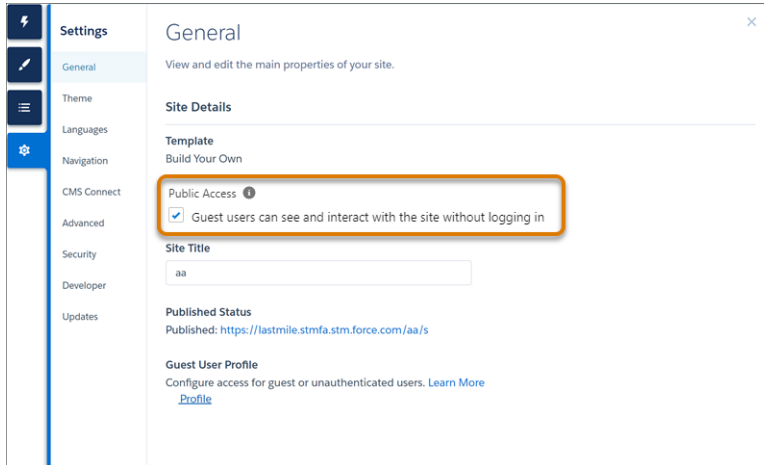
The Field Service core features, managed package, and mobile app are available in **Enterprise, Unlimited, and Developer** Editions.

The Field Service Guest User license is required.

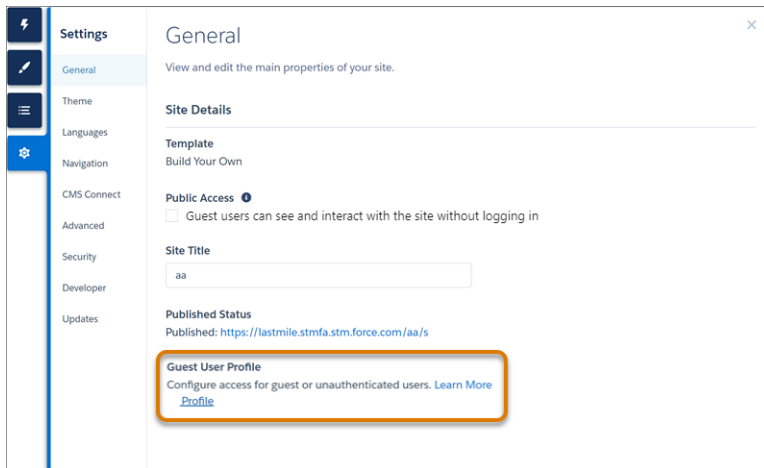
USER PERMISSIONS

To add components to sites:

- Create and Set Up Experience Sites AND View Setup and Configuration



- c. In Guest User Profile, click **<Your Site Name> Profile**.



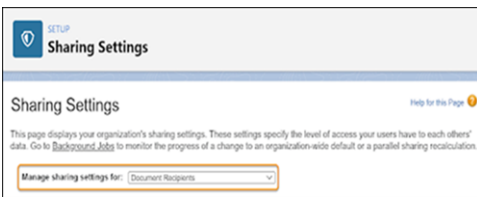
- d. Grant read permission.
- From Profile Detail, click **Edit**.
 - Under Standard Object Permissions, grant read permission for Document Recipients, Service Appointments, and Work Orders.
 - Save your changes.
- e. Enable the Apex classes.
- From Enabled Apex Class Access, click **Edit**.
 - Add these Apex classes: `FSAA.TouchlessSignEncryptionService` and `FSAA.TouchlessSignServiceReportHandler`.
 - Save your changes.
- f. Set field-level security.
- Under Field-Level Security, click **View** next to Document Recipient.
 - Click **Edit**.

- c. Grant read access to the Status field.
 - d. Save your changes.
- g. Grant permission set license assignments.
 - a. From Profiles, click **View Users**, and then click the user's name.
 - b. From Permission Set License Assignments, click **Edit Assignments**.
 - c. Select **Field Service Guest User**.
 - d. Save your changes.
 - h. Grant permission set assignments.
 - a. From Permission Set Assignments, click **Edit Assignments**.
 - b. Add the Field Service Guest User Permissions permission set.
 - c. Save your changes.
5. Publish the site.

Create a Sharing Rule for Contactless Signature

Add a sharing rule to share service report records with the guest users.

1. From Setup, in the Quick Find box, enter *Security*, and then select **Sharing Settings**.
2. For manage sharing settings, select **Document Recipients**.



3. Under Sharing Rules, click **New**.
4. For Rule Type, select **Guest user access, based on criteria**.
5. Enter the sharing criteria.
 - a. For Field, select **Status**.
 - b. For Operator, select **not equal to**.
 - c. For Value, enter *Completed*.
6. Select to include records owned by high-volume users.
7. Share the rule with **<Your Site Name> Site Guest User**.
8. Save the rule.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To create a sharing rule:

- Customize Application


Create a Message Template for Contactless Signature

Create a template for the message sent to customers for signing the service report.

1. From Setup, in the Quick Find box, enter *Messaging*, and then select **Messaging Templates**.
2. To create the template, click **New Template**.
3. In the Information area, enter the template name, developer name, and the message that the customer receives.
4. Add the URL placeholder to your message. The URL enables customers to navigate to the Experience Builder site that you configured for service report details and signatures.
 - a. For Related To, select Document Recipient.
 - b. For Field, select **Digital Signature URL**.
 - c. Click **Insert**.
The URL placeholder looks like
this: `{!DocumentRecipient.DigitalSignatureUrl}`
5. In the Channels area, select one or more channels.
6. Save your changes.

Set Up Contactless Signature Flows

Create your own version of the flows based on the templates in the Appointment Assistant package.

1. From Setup, in the Quick Find box, enter *Process Automation*, and then select **Flows**.
2. To create your own copy of the **Create Service Report and Document Recipient** flow, open the flow, click **Save As**, and activate the flow.
3. Add your site's URL to your **Generate and send URL to Contact** flow.
 - a. In Experience Builder, click Settings .
 - b. From Published Status, copy your site's URL.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Available only if Digital Engagement is enabled.

USER PERMISSIONS

To create a message template:

- Configure Messaging

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

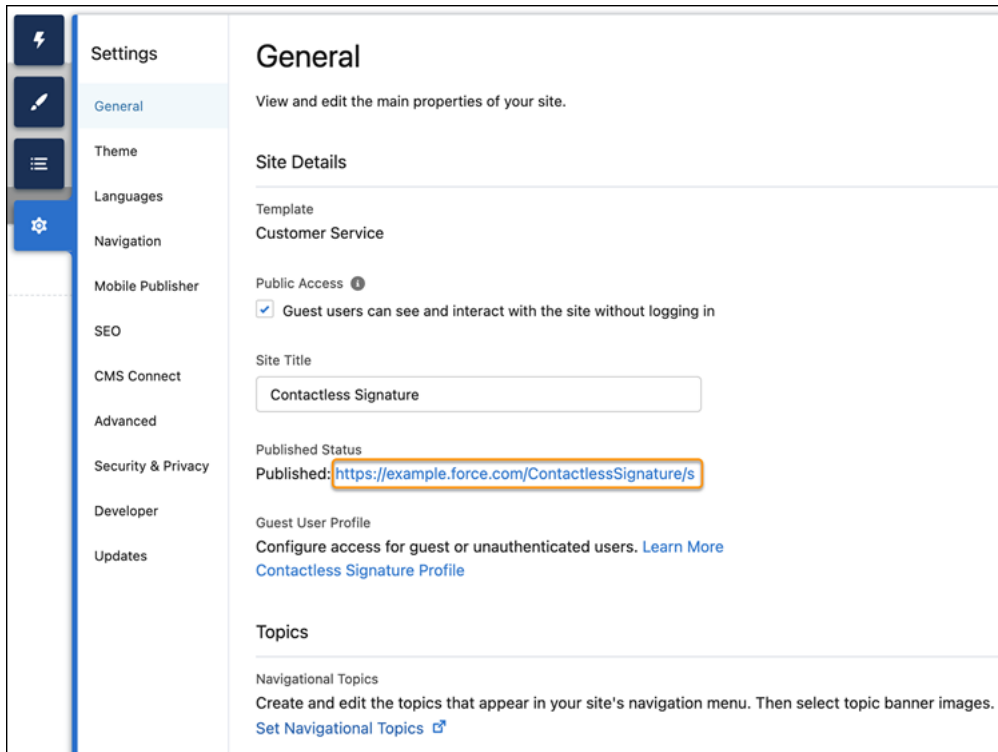
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

Available only if Digital Engagement is enabled.

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow



- c. Open the **Generate and send URL to Contact** flow.
 - d. In the flow, open the **Get URL** apex action.
 - e. In SiteURL, this URL appears: `?drid={!$Record.Id}&expiration=60&type=Default`
Add your site's URL at the beginning. For example:
`https://example.force.com/ContactlessSignature/s?drid={!$Record.Id}&expiration=60&type=Default`
You can leave the rest of the URL as is, or you can change these details.
 - Expiration—`60` is the number of minutes the URL is valid for from the time it's generated. You can change this number according to your needs.
 - Type—`Default` is the signature type defined in your service report template. If you're not using the default type of digital signature, change the type to the one that's used in your service report.
4. To use email, click **Save As**, and activate the **Generate and send URL to Contact** flow.
 5. To use SMS, delete the Send URL action, and create a new action.
 - a. To add an element to the flow, hover over \circ , and click \oplus .
 - b. Under Interaction, select **Action**.
 - c. In the Action field, enter *Messaging Notification*.
 - d. Turn on these options to include them.
 - Context Record ID
 - Recipient Phone Number
 - Recipient Record ID
 - e. Fill in these fields.

- Label—A name you choose
 - API Name—A name you choose
 - Messaging Channel Unique Name—Developer name of your Contactless Signature messaging channel
 - Messaging Template Unique Name—Developer name of the Messaging template that you created for Contactless Signature messages
 - Context Record ID—The Document Recipient ID
 - Recipient Phone Number—The contact phone number used for sending the message. To populate this field, enter *contact*, and select **Contact from Get_Contact**. Then select the required phone field. For example, if you select Mobile Phone, the field looks like this: `{!Get_Contact.MobilePhone}`
 - Recipient Record ID—The RecipientId from the DocumentRecipient record
- f. Click **Done**.
- g. Click **Save As**, and activate the **Generate and send URL to Contact** flow.

Add a Quick Action for Contactless Signature

Create an action to send customers a link to the Contactless Signature page.

1. Create the action that shares the service report with the customer.
 - a. From the Object Manager in Setup, choose the object that includes the contact information and the service report (Service Appointments, Work orders, or Work Order Line Items).
 - b. Click **Buttons, Links, and Actions**.
 - c. Click **New Action**.
 - d. For Action Type, select **Flow**.
 - e. For Flow, select your copy of the **Create Document Recipient and Service Report** flow.
 - f. Fill in the rest of the fields, and save your changes.
2. Add the action to the mobile layout.
 - a. From the Object Manager, click **Page Layouts**, and open the mobile layout.
 - b. From the layout editor, select **Mobile & Lightning Actions**.
 - c. Drag your action into the Salesforce Mobile and Lightning Experience actions.
 - d. Save your changes.

SEE ALSO:

[Connect a Flow to the Field Service Mobile App](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To create quick actions and add them to page layouts:

- Customize Application

Expose the Document Recipient Object's Status Field

The Document Recipient object's Status field must be visible for the Contactless Signature flow.

1. From Setup, go to the Object Manager tab.
2. In the Quick Find box, enter *Document Recipient*, and then select **Document Recipient**.
3. Click **Fields & Relationships**, and then select **Status**.
4. Click **Set Field-Level Security**, and make the field-level security visible for all profiles.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The Field Service Appointment Assistant managed package and permission set license are required.

USER PERMISSIONS

To customize field settings:

- Customize Application

Set Up Surveys for Field Service Appointment Assistant

Send Salesforce Surveys to customers to get their feedback after an appointment. Salesforce Surveys requires a license that isn't integrated with the Appointment Assistant license. You can also choose to integrate with GetFeedback.

Before you set up the flow for Salesforce Surveys, you must:

- [Enable Salesforce Surveys](#).
- Grant permissions that allow your customers to access the survey. See [Give Guest Users Permission to Respond](#).
- Create a Salesforce Survey that you can send to your customers. See [Create a Survey](#).
- Add a custom field to the Service Appointment object as a placeholder for the link to the survey.

To set up the flow to send Salesforce Surveys, complete these steps.

1. From Setup, in the Quick Find box, enter *Process Automation*, and then select **Flows**.
2. Click **New Flow**.
3. Select **Record-Triggered Flow**, and click **Create**.
4. In the Configure Start window:
 - a. In Object, enter *Service Appointment*.
 - b. In Trigger the Flow When, select **A record is updated**.
 - c. In Condition Requirements, select **All Conditions Are Met (AND)**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience




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

Available only if Digital Engagement is enabled.

USER PERMISSIONS

To set up surveys:



- System Administrator profile

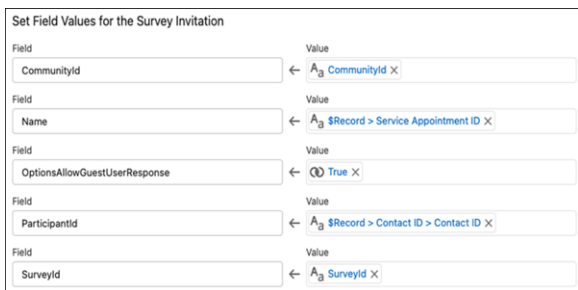
- d. For Field, enter *Status*.
 - e. For Operator, select **Equals**.
 - f. For Value, enter *Completed*.
 - g. In When to Run the Flow for Updated Records, select **Only when a record is updated to meet the condition requirements**.
 - h. Click **Done**.
5. Create a resource for the Experience Site name.
 - a. From the Toolbox, click **New Resource**.
 - b. For Resource Type, select **Variable**.
 - c. For API name, enter *SiteName*.
 - d. For Data Type, select **Text**.
 - e. In Default Value, enter your Experience Site name.
 - f. Click **Done**.
6. Create a resource for the survey ID.
 - a. From the Toolbox, click **New Resource**.
 - b. For Resource Type, select **Variable**.
 - c. For API name, enter *SurveyID*.
 - d. For Data Type, select *Text*.
 - e. In Default Value, enter your survey record ID.
 -  **Tip:** To find your survey record ID, from the App Launcher, find and select **Surveys**, and click the name of your survey. Then, copy the ID from the URL.
 - f. Click **Done**.
7. Get the Experience Site ID.
 - a. To add an element to the flow, hover over , and click .
 - b. Under Data, select **Get Records**.
 - c. Enter a name for the label. API Name is populated based on the label name.
 - d. For Object, select **Network**.
 - e. In Condition Requirements, select **All Conditions Are Met (AND)**.
 - f. For Field, enter *Name*.
 - g. For Operator, select **Equals**.
 - h. For Value, enter the resource that you created for the Experience Site name.
 - i. For How to Store Record Data, select **Choose fields and assign variables (advanced)**.
 - j. For Where to Store Values, select **In separate variables**.
 - k. For Field, select **Id**.
 - l. For Variable, click in the field and select **New Resource**.
 - For Resource Type, select **Variable**.
 - For API name, enter *SiteID*.

- For Data Type, select **Text**.
- Click **Done**.

m. Click **Done**.

8. Create and save the Survey Invitation object.

- To add an element to the flow, hover over , and click .
- Under Data, select **Create Records**.
- Enter a name for the label. API Name is populated based on the label name.
- For How to Set the Record Fields, select **Use separate resources, and literal values**.
- For Object, select **Survey Invitation**.
- Set the field values.



Field	Value
CommunityId	A_g CommunityId x
Name	A_g \$Record > Service Appointment ID x
OptionsAllowGuestUserResponse	True x
ParticipantId	A_g \$Record > Contact ID > Contact ID x
SurveyId	A_g SurveyId x



g. Select **Manually assign variables**.

h. For Variable, click in the field and select **New Resource**.

- For Resource Type, select **Variable**.
- For API name, enter *SurveyInvitationID*.
- For Data Type, select **Text**.
- Click **Done**.

i. Click **Done**.



9. Create and save the Survey Subject to link the survey to the service appointment record.

- To add an element to the flow, hover over , and click .
- Under Data, select **Create Records**.
- Enter a name for the label. API Name is populated based on the label name.
- For How to Set the Record Fields, select **Use separate resources, and literal values**.
- For Object, select **Survey Object**.
- Set the field values.



Field	Value
SubjectId	\$Record > Service Appointment ID
Name	\$Record > Service Appointment ID
ParentId	surveyinvitationId

g. Click **Done**.

10. Get the Survey Invitation, and save the survey link.

- a. To add an element to the flow, hover over , and click .
- b. Under Data, select **Get Records**.
- c. Enter a name for the label. API Name is populated based on the label name.
- d. For Object, select **Survey Invitation**.
- e. In Condition Requirements, select **All Conditions Are Met (AND)**.
- f. For Field, enter *Id*.
- g. For Operator, select **Equals**.
- h. For Value, enter *SurveyInvitationId*.
- i. For How to Store Record Data, select **Choose fields and assign variables (advanced)**.
- j. For Where to Store Values, select **In separate variables**.
- k. For Field, select **InvitationLink**.
- l. For Variable, select **SurveyInvitationLink**.
- m. Click **Done**.

11. Update the Service Appointment custom field that you created to hold the survey invitation link.



- a. To add an element to the flow, hover over , and click .
- b. Under Data, select **Update Records**.
- c. Enter a name for the label. API Name is populated based on the label name.
- d. For Field, select the custom field that you created on the Service Appointment object.
- e. For Value, select **SurveyInvitationLink**.

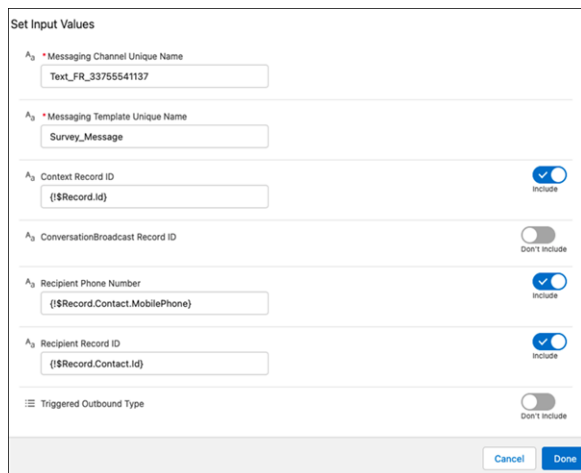
Field	Value
Survey_Invitation_Link__c	{SurveyInvitationLink}

f. Click **Done**.

12. Create a messaging template.

- a. From Setup, in the Quick Find box, enter *Messaging*, and then select **Messaging Templates**.
- b. To create the confirmation template, click **New**.
- c. In the Information area, enter the template name, developer name, and the message that the customer receives.

- d. Add the URL placeholder to your message. The URL enables customers to navigate to the Experience Site that you configured.
 - a. For Related To, select **Service Appointment**.
 - b. For Field, select a placeholder for the survey link.
 - c. Click **Insert**. The URL placeholder is added to the message.
 - e. In the Channels area, select one or more channels.
 - f. Save your changes.
13. Send an SMS with a link to the survey.
- a. Open the survey flow.
 - b. To add an element to the flow, hover over , and click .
 - c. Under Interaction, select **Action**.
 - d. For Action, select **Messaging Notification**.
 - e. Enter a name for the label. API Name is populated based on the label name.
 - f. For Messaging Channel Unique Name, enter the messaging channel's developer name.
 - g. For Messaging Template Unique Name, enter the messaging template's developer name.
 - h. Include the Context Record ID, and then select **Record.Id**.
 - i. Include the Recipient Phone Number, and then select **Record.Contact.MobilePhone**.
 - j. Include the Recipient Record ID, and then select **Record.Contact.Id**.
 - k. Click **Done**.



Set Input Values

Messaging Channel Unique Name
Text_FR_3375541137

Messaging Template Unique Name
Survey_Message

Context Record ID
{!\$Record.Id} Include

ConversationBroadcast Record ID Don't include

Recipient Phone Number
{!\$Record.Contact.MobilePhone} Include

Recipient Record ID
{!\$Record.Contact.Id} Include

Triggered Outbound Type Don't include

Cancel Done

14. Save and activate the flow.

Field Service Mobile App

The Field Service mobile app for Android and iOS is an all-in-one tool optimized for a modern mobile workforce. Designed as an offline-first app, you can work and have your changes saved without internet connectivity. And the app is highly customizable to meet your business 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.

Feature	Description
Offline capability	The app works offline, so mobile workers can complete their work even with limited or no network connectivity.
Push notifications	Push notifications help your mobile workforce stay up to date, making sure they never miss an important event.
Custom branding	Brand the app to give it your company's look and feel.
Configurable layouts	Flexible layouts let you choose what record information to display to your users.
Configurable actions	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.
Chatter	Communicate with dispatchers, partners, and customers using Chatter.
Site user access	Give members of your Experience Builder site—like contractors—custom access to your field service operation.
Geolocation tracking	Keep tabs on service resources and enable smarter scheduling with resource geolocation tracking.
Service reports	Create previewable service reports summarizing field service visits. Seal the deal by capturing customers' signatures on the reports.
Salesforce Knowledge integration	Attach specs, instructions, and best practices to work orders and work order line items to keep relevant information at your team's fingertips.
Work order overview screen	Help your team quickly find the information they need to complete assignments. The work order overview screen displays information about a

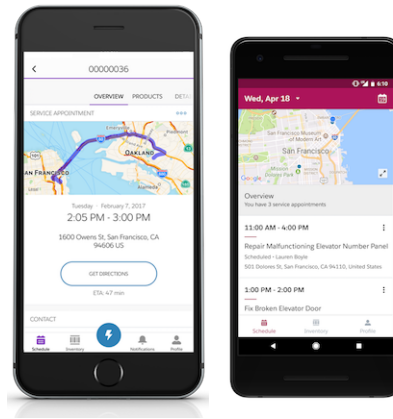
EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

Feature	Description
	work order's service appointments, line items, asset history, and more.
Inventory tab	Let your team manage track consumption, request products, and view their inventory from the app.
Appointment Assistant	Give customers temporary, live tracking of Salesforce Field Service mobile workers.



[Field Service Mobile App Requirements](#)

Learn about the mobile app's device, connectivity, edition, and license requirements.

[Field Service Mobile App Considerations](#)

Review considerations for the Field Service mobile app for Android and iOS.

[Offline Considerations in the Field Service Mobile App](#)

Your field service workers' productivity doesn't have to stop when there's no connectivity. Learn how to use the Field Service mobile app when offline.

[Field Service Mobile Security](#)

Protect and safely store data that is gathered from the Field Service mobile app (Android and iOS).

[Field Service Mobile App Updates](#)

Stay in the know about the Field Service mobile app releases. This topic includes information on the mobile app release cadence for major, patch, and daily releases (also known as emergency releases), plus information on testing and beta periods.

[Field Service Mobile Beta and Early Adopters Program](#)

By participating in the Field Service Mobile Beta and Early Adopters program, you can test new versions of the app before adopting them.

[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.

[Supported Barcodes](#)

Learn about the barcodes that are compatible with the Salesforce Field Service mobile app.

[Initial Field Values in the Field Service Mobile App](#)

The initial value shown in a field when running a quick action depends on several factors.

[Downloading the Field Service Connected App](#)

Before you configure user access and customize the Field Service mobile app, download the connected app

[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.

[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.

[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.

SEE ALSO:

[Install the Field Service Managed Package](#)

[Set Up Field Service](#)

[Field Service Mobile App Considerations](#)

[Field Service Mobile App Requirements](#)

[Using the Field Service Mobile App](#)

[Trailhead: Boost Field Service with Mobile](#)

Field Service Mobile App Requirements

Learn about the mobile app's device, connectivity, edition, and license requirements.

Devices

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, minimum platform requirements are subject to change at the sole discretion of Salesforce, with or without advance notice.

Supported Devices	Recommended Devices	Supported Mobile Operating System	Other Requirements
Android: All major Android devices with at least 3 GB of memory are supported.	Android: The app is optimized for Samsung and Google Pixel devices, such as Samsung Galaxy Tab Active3, Samsung A5, and Google Pixel 5.	Version 9.0 and later	<ul style="list-style-type: none"> Google Play Services version 18.0.0 and later Minimum Android WebView version is 90.0

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

Supported Devices	Recommended Devices	Supported Mobile Operating System	Other Requirements
			<ul style="list-style-type: none"> • Wi-Fi • GPS
iOS <ul style="list-style-type: none"> • iPad: <ul style="list-style-type: none"> – iPad 5th generation and later – iPad Air 2nd generation and later – iPad Mini 4 and later – iPad Pro all models • iPhone: <ul style="list-style-type: none"> – iPhone 8 and iPhone 8 Plus – iPhone X – iPhone XR, iPhone XS, and iPhone XS Max – iPhone 11, iPhone 11 Pro, and iPhone 11 Pro Max – iPhone 12 Mini, iPhone 12, iPhone 12 Pro, and iPhone 12 Pro Max – iPhone 13 Mini, iPhone 13, iPhone 13 Pro, and iPhone 13 Pro Max – iPhone 14, iPhone 14 Plus, iPhone 14 Pro, and iPhone 14 Pro Max – iPhone SE 1st generation and later 	iOS <ul style="list-style-type: none"> • iPad: <ul style="list-style-type: none"> – iPad 9th generation and later – iPad Air 4th generation and later – iPad Mini 6th generation and later – iPad Pro 11 inch, 2nd generation, and later – iPad Pro 12.9 inch, 4th generation, and later • iPhone: <ul style="list-style-type: none"> – iPhone 11, iPhone 11 Pro, and iPhone 11 Pro Max – iPhone 12 Mini, iPhone 12, iPhone 12 Pro, and iPhone 12 Pro Max – iPhone 13 Mini, iPhone 13, iPhone 13 Pro, and iPhone 13 Pro Max – iPhone 14, iPhone 14 Plus, iPhone 14 Pro, and iPhone 14 Pro Max – iPhone SE 2nd generation and later 	Version 15.0 and later	None

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.

 **Note:** To protect your company data, we only support OS versions that get security updates from the device manufacturer.

For optimal performance, keep your mobile devices' operating systems updated and upgrade to the latest model of devices as allowed by your mobile plan. When you update the Field Service mobile app, sometimes you must remove support for older operating systems, and newer operating systems don't always 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.

SEE ALSO:

- [Field Service Mobile App](#)
- [Give Users Access to the Field Service Mobile App](#)
- [Field Service Mobile App Considerations](#)
- [Field Service Mobile App Considerations](#)
- [Get the Field Service Mobile App](#)

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.
- If you're using Appointment Assistant, when a mobile worker manually updates the status of a service appointment by directly editing the record, Appointment Assistant is triggered. It's also triggered when the appointment gets updated through a flow or an automatic status change. When a Lightning web component updates the same status, Appointment Assistant isn't triggered.
- The mobile app fetches a maximum number of 1000 service appointments from all service appointment list views.

Document Builder

- For a Work Order template to work on the Field Service mobile app, you must also create a Service Appointment template.
- For a parent work order with a child service appointment, mobile users can't access the Work Order template from the template selector. You must create a Service Appointment template even if you don't want to use it. We suggest creating a Service Appointment template that's identical to your Work Order template to minimize confusion.

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

- 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.
- A service report language pick list shows all supported languages, not only the active ones.
- Although the picklist values aren't translated in service report previews, they're translated into the supported language when the service report is generated.
- The signature image doesn't appear when mobile workers create multiple service reports offline from the same record on the Field Service mobile app.

Inventory Management

- 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.
- When using multiple inventory locations, a maximum of 10 locations per location type are shown and primed.
- A maximum of 1,000 products are shown in inventory lists and is the maximum number of products that can be primed.
- When consuming a serialized product in the FSL mobile app, a products consumed record without serial numbers is created. Mobile users can remove those records only if they have delete permissions for products consumed.

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.
- Settings for optimized images are supported in files uploaded in mobile flows, but aren't applied to images uploaded in the Chatter Feed.

Barcode Scanner


- For a list of supported barcodes, see [Supported Barcodes](#).
- (iPad) Barcode scanning isn't supported in Split View.

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

- Automatic Screen Fields with fieldType = ObjectProvided isn't supported on mobile flows.
- Compound fields, for example street addresses, can't be used directly in mobile flows. To access this data, fields such as city and country that comprise the compound field must be used instead.
- Select formula functions and operators are available offline.
- Backslash \ characters, single quotes ('), and multi-line strings aren't supported in flow formula fields.
- CRM Core App screen flows aren't supported in the Field Service mobile app. Only Field Service mobile flows are supported.
- Email alert actions aren't supported in flows.
- Paused flows aren't supported. If you left a flow in progress or 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 or the Get element 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 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.
- In mobile flow filtering, the user sees a related list instead of a picklist if these conditions are met:
 - The flow value store always has a specified parent ID (the parameter with ID passed in), unless the parent ID from the value store is nulled.
 - The user creates a screen step in the flow builder with a single field, and that field uses a single dynamic choice as choice reference. Additionally, the dynamic choice isn't a picklist and contains the parent record ID as a filter.
 - The parent record identified by the parent ID has dynamic choice type configured as a related list.
- Flows can have up to nine conditions in a decision element.
- Record Choice Sets created using the AttachedContentDocuments objects on a Work Order or other supported object 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. Doing so 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.
- Changing the name of or hiding navigation buttons in flows isn't supported in the Field Service mobile app.
- When a mobile flow contains an image, the `BeforeInsert` trigger in Apex can cause an error.
- To remove access to custom objects, log out and then back into the mobile app.
- Conditional visibility () isn't supported.
- The In and Not In operators in flows aren't supported in the Field Service mobile app.
- Dependent picklists are supported in mobile flows but aren't supported on the desktop site.

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.

Quick Actions

- In environments enabled with SLDS, a quick action that relies on default values to modify or create a record honors only the default value if the field is added to the quick action layout and the user has edit permission for that field.
- For LDS-enabled environments, global quick actions don't refer to the record type fields.
- Lightning Component and custom override quick actions aren't supported.
- Quick action values aren't updated when working offline.
- Quick actions can override the permission "accurate record dates for offline", causing inaccurate logging after the app comes back online.
- Custom icons in quick actions aren't supported.

- Quick actions with default values can take up to a minute to render during poor or unstable network connectivity.

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 doesn't support preceding zeros. To sort correctly on the desktop, define the sort order by 10 on a number field of a custom object, for example, 10, 20, 30.
- For the Overview tab to be visible, work order line item page layouts must include the Asset field and the Service Report related list.
- Searching the price book fails if you assign rich text area fields to the Product object's search layout.
- Work orders allow a maximum of 1,000 work steps per work order. However, the total length of all fields in the Work Order object must not exceed 20,000 characters. If you exceed this limit, some work steps don't appear in the mobile app.

General Limitations

- When displaying related lists in the mobile app, such as the work order line items for a work order, users see an accurate record count of up to 2,000 records. More than 2,000 records are indicated as 2,000+, but no more than 2,000 records are retrievable.
- 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.
- 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.
- If the record type field isn't on the page layout when a resource absence is created, the default record type is automatically set. 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.
- Record pagination isn't supported in the Field Service mobile app.
- Notification settings use the mobile settings assigned to the user initiating the request, not the user receiving the request.
- If an object hasn't been primed or previously accessed, including new records, it isn't visible from another object's UI.
- When launching the mobile app, the lock screen keeps the same screen orientation, which can't be changed by rotating the device. To change the lock screen orientation, close the mobile app, change to the desired orientation, then relaunch the mobile app.
- Mobile Extension Toolkit (MET) isn't supported in Salesforce Lightning Design System (SLDS). Customers must migrate their MET to a Lightning web component (LWC) for use with SLDS.
- During OAuth 2.0 authentication, Salesforce creates a temporary short-term session to bridge the gap between login and the Salesforce authorization (Allow Access) screen. This temporary session, which uses a cookie, isn't tied to the OAuth refresh or access token and therefore isn't invalidated at logout. Instead, the session remains valid until it expires. The most recently authenticated customer remains logged in until the temporary session expires and they're temporarily unable to log out. These sessions have an intentionally short lifetime, after which the user can log in normally.
- In environments enabled with SLDS, the field values OldValue and NewValue can't be loaded in Histories related records.
- Related lists don't show details of Salesforce objects that you can't include in a page layout, such as Work Order History.
- The Field Service mobile app doesn't support free-form text entries in picklists.

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

- iOS devices automatically stay awake during priming without the user tapping the screen. If low power mode is on, the device doesn't stay awake during priming.
- 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 the 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. This format override impacts some components, such as the date and time picker and flow fields.
- You can't copy and paste data from apps that aren't Salesforce, such as Safari, when DISABLE_EXTERNAL_PASTE is set to **TRUE** in the connected app settings.
- In iOS 15, the iPad calendar view doesn't show dots to indicate that a service appointment exists.
- In iOS, an ETA and driving directions are provided only if the user is within 1000KMs of the destination.

SEE ALSO:

[Field Service Mobile App](#)

[Field Service Mobile App Requirements](#)

[Field Service Limits and Limitations](#)

[Field Service Mobile App Requirements](#)

[View Knowledge Articles in the Field Service Mobile App](#)

[Supported Data Types in the Field Service Mobile App](#)

[Customize the Schedule Tab](#)

[Offline Priming in the Field Service Mobile App](#)

[In-App Profile Settings in the Field Service Mobile App](#)

Offline Considerations in the Field Service Mobile App

Your field service workers' productivity doesn't have to stop when there's no connectivity. Learn how to use the Field Service mobile app when offline.

The Field Service mobile app can work effectively when offline. You may notice some slight differences. For example, when you create an object offline, it doesn't display fully until your device syncs with the server.

The following topics describe how to prepare the mobile app for offline use, and what features work differently when offline.

Topic	Description
Offline Priming	Before using the app offline, sync the app while online. To learn more, see Offline Priming on page 762.
Initial Field Values	The initial values shown in a field can be different when offline. To learn more, see Initial Field Values on page 680.
Flows	Flows cannot retrieve additional information beyond what's available in the cache. Offline execution may prevent some lookups from returning all the expected information. You can encounter an error in this situation.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

Topic	Description
Date/Time	<ul style="list-style-type: none"> • Date/Time fields sync to the server when the app comes back online. The date and time does not reflect the date and time when the record was created and/or updated. • To reflect the actual creation or updated date and time, contact Field Service Support to enable the option Accurate Record Dates for Offline for your org. • If you use the 'NOW()' function with your Date/Time fields, the value still reflects the date and time the record synced to the server instead of the current date and time. • To keep the offline date/time value when a service appointment record is updated on the app, save the LastModifiedDate value to another date/time field in the same service appointment record. • The Date column in the service appointment History tab does not reflect the offline date/time that update was made on the app if a consecutive update is triggered. To retain the offline date/time value in such a case, save the LastModifiedDate value of that service appointment record to another date/time field in the same service appointment record.

SEE ALSO:

[Offline Priming in the Field Service Mobile App](#)

[Initial Field Values in the Field Service Mobile App](#)

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)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

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 2: Offline Data

Salesforce App	Field Service App
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.	Data is stored using the Sqlcipher provider for Sqlite3. Cached data is purged based on a least-recently-used cache policy.

Table 3: Files and Attachments

Salesforce App	Field Service App
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).	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.

Table 4: Chatter Feed Data

Salesforce App	Field Service App
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.	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.

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

Salesforce App	Field Service App
<p>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.</p> <p>Alternatively, Salesforce's Lightning Login feature has multifactor authentication from the Salesforce Authenticator app. The factors are:</p> <ul style="list-style-type: none"> • What you have: The mobile device • What you are: If fingerprint biometrics is enabled on the device • What you know: if the device is enabled for PIN-based login. <p>Lightning Login is only enabled on devices that have either PIN or fingerprint enabled.</p>	<p>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.</p>

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.

Setting	Supported on Field Service Mobile	Supported on Salesforce Mobile
DISABLE_EXTERNAL_PASTE	 (Default: FALSE)	
FORCE_EMAIL_CLIENT_TO		
SHOW_OPEN_IN	 (Default: TRUE)	
SHOW_PRINT		

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.

MDM	Supported on Field Service Mobile	Supported on Salesforce Mobile
RequireCertAuth		
AppServiceHosts		
AppServiceHostLabels		
OnlyShowAuthorizedHosts		

MDM	Supported on Field Service Mobile	Supported on Salesforce Mobile
ClearClipboardOnBackground	✓	✓

SEE ALSO:

- [Encrypt New Data in Fields](#)
- [Which Standard Fields and Data Elements Can I Encrypt?](#)
- [Field Audit Trail Implementation Guide](#)
- [Salesforce Mobile App Security Guide](#)

Field Service Mobile App Updates

Stay in the know about the Field Service mobile app releases. This topic includes information on the mobile app release cadence for major, patch, and daily releases (also known as emergency releases), plus information on testing and beta periods.

EDITIONS

Available in: Mobile

Release Maintenance Types

The Field Service mobile app has three types of releases, which align with Salesforce maintenance types: major releases, patch releases, and daily releases. So you can best prepare for changes, here's a description for each type of release, including the length of their associated beta testing period.

Release Type	Description	Frequency
Major release	Updates Salesforce Field Service mobile app with new features. The beta period is approximately 30 days.	Three times per year
Patch release	Deploys changes and fixes as needed to address significant, but nonemergency, customer impacting issues. The beta period is 7 days.	As needed
Daily release (also known as emergency release)	Deploys fixes to emergency customer-impacting issues as needed. No beta period, because daily releases are deployed on an emergency basis.	As needed

Mobile Release Calendar and Communication

Here are the approximate dates for the next three major releases. Release dates are occasionally delayed to maintain customer trust.

- Spring '24: February 12, 2024
- Summer '24: June 17, 2024
- Winter '25: October 14, 2024

Important: We deploy major and patch releases over several days to ensure stability. The updates aren't necessarily available for all users until 7 days after the app becomes generally available.

And here's where and when you can find communication about each release.

Release Type	Where	When
Major release	Learn more about major releases and new mobile app features in our standard Salesforce Field Service release notes . You also receive notification through your Trailblazer group.	Release notes offer a preview of new features approximately two months before the release. And you get notification via your Trailblazer group when beta and major releases go live.
Patch release	Find information about patch releases through the Field Service Mobile Trailblazer group .	When we identify a need, we inform you. You receive a second announcement when the release goes live, approximately 7 days later. The first announcement includes a brief description of each issue resolved to help you focus your testing.
Daily release (emergency)	Find information about daily releases through the Field Service Mobile Trailblazer group .	When we identify a need, we inform you at least a day before a daily release. You receive a second announcement when the release goes live.

Testing Best Practices

Test features before they're generally available by using the [Field Service Mobile Beta and Early Adopters Program](#). If you have issues with a beta version, log a case immediately so that it can be reviewed before the generally available (GA) release.

If you have complex security or compliance requirements and require greater control over what updates go out, you can use Mobile Device Management (MDM).

SEE ALSO:

[Mobile Device Management \(MDM\)](#)

Field Service Mobile Beta and Early Adopters Program

By participating in the Field Service Mobile Beta and Early Adopters program, you can test new versions of the app before adopting them.

The generally available (GA) Salesforce Field Service mobile application is released three times per year for iOS and Android. The mobile release occurs about a week after the major core application release. To learn more about the different types of releases and delivery dates for the Field Service mobile application, see [Field Service Mobile App Updates](#).

You can test the Field Service mobile app releases ahead of time using the iOS and Android Beta Early Access programs. The mobile beta versions are available the Monday after sandboxes are updated with the upcoming major release, which takes place approximately one month before the major release.

Benefits of Participating

By using the iOS and Android Beta Early Access programs, you can test upcoming mobile releases before they become available on the App Store or Google Play Store.

- Preview changes so you can plan and communicate to your workers.
- Test what's coming and determine whether any issues affect your implementation
- Build and integrate the latest features so you're ready to use them in production.
- Report problems so that we can correct them before the app becomes generally available.

Eligibility

You can use the beta release to test the latest Salesforce Field Service features as soon as they're available. The beta app can be used only after your org has been updated to the newest version. As a result, there's approximately a month when the beta version can be used only with sandbox orgs. Any attempt to log into production results in an error.

Use of the beta feature is subject to the [Beta Services Terms](#).

Availability

Salesforce Field Service mobile application beta releases are published as major and patch releases. See the full schedule and information about different types of releases at [Field Service Mobile App Updates](#).

[Resources for Testing Beta Versions of the Field Service Mobile App](#)

Salesforce provides resources to help you use the beta program to test the latest Field Service mobile app major releases and patch releases.

[Sign Up for the Field Service Mobile App Beta Program for Android](#)

All users of Salesforce Field Service software packages can access our beta builds. You can access beta versions of our Field Service mobile application for Android in the Google Play store.

[Sign Up for the Field Service Mobile App Beta Program for iOS](#)

All users of Salesforce Field Service software packages can access our beta builds. You can access beta versions of our Field Service mobile application for iOS via TestFlight. TestFlight is an app that Salesforce uses to share beta versions of the Salesforce Field Service mobile app.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

[Channels for Providing Feedback on Beta Releases](#)

You can provide feedback on beta releases at any time. Feedback helps our customer support and engineering teams improve your experience with Salesforce Field Service by better understanding your experiences with the app. You can provide feedback through a number of channels.

Resources for Testing Beta Versions of the Field Service Mobile App

Salesforce provides resources to help you use the beta program to test the latest Field Service mobile app major releases and patch releases.

Sandboxes

When you have the mobile application beta version installed, you're ready to start testing. The most effective way to test beta versions of the mobile app is via the latest Salesforce sandbox test environment. We suggest that you keep an existing sandbox instance up to date, so that you can perform testing using data specific to your unique configurations and needs. Sandbox test environments are also an excellent resource when interacting with our support teams for any issues you encounter while consuming our beta versions.

For instructions on how to obtain and use sandboxes for testing, see [Sandboxes: Staging Environments for Customizing and Testing](#).

If you're a first-time user or have to start a Sandbox from scratch, check out [Where Do I Start with Field Service](#) to set up for testing.

Testing Major Releases

Major releases introduce new features, performance improvements, UI or UX updates, and API changes. We hope these features improve your work and business, but the changes can sometimes also create configuration conflicts. Although we strive to maintain backward compatibility, new releases can unexpectedly affect customizations that are specific to your implementation. The best way to protect your implementation is through beta testing.

To benefit most from the beta, create a test plan based on the most recent changes to the Field Service mobile app. Consider which features or Salesforce Field Service products you use most or that are most important to your business. To identify changes that impact your most crucial processes, focus your testing by reviewing Salesforce release notes each release.

Here's where you can find release notes pertaining to Field Service:

- [Salesforce Release Notes](#) alert you to the features being released for all Salesforce products.
- Within the *Salesforce Release Notes*, the [Salesforce Field Service Release Notes](#) cover the Field Service features specifically, and includes a special section for the latest features released for the [Salesforce Field Service Mobile Release Notes](#). These notes alert you to what's changed in the mobile application.

Testing Patch Releases

Patch releases are deployed only to resolve specific issues discovered on an existing production release. Beta versions for patch releases are made available at least one week before changes to the app are deployed.

When consuming a patch release, you can isolate your testing to the specific purpose of the patch release.

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Recommended Test Areas

In addition to reviewing the *Salesforce Release Notes* and testing potentially affected areas, it's important to review parts of the application that you've customized or extended for your specific needs.

We suggest starting your testing with Lightning Web Components and flows, because they're the most commonly customized features.

- [Lightning Web Components](#)
- [flows](#)

Also consider these frequently customized items when you plan for testing.

- [Mobile Settings](#)
- [Custom Actions](#)
- [Customized Push Notifications](#)
- [Deep Linking](#)
- [Custom Triggers](#)

Lightning Web Components (LWC) Test Harness

If you use Lightning Web Components (LWC), the [LWC Offline Test Harness](#) (Test Harness, for short) is a lightweight testing and debugging app. Test Harness lets you iteratively develop, test, and debug Lightning web components for use in LWC Offline-based mobile apps. The streamlined app experience accelerates the interactive development lifecycle, making it easy to quickly test incremental improvements and fixes to your mobile LWCs.

More Tools for Debugging Lightning Web Components

We suggest using your web browser to debug Lightning Web Components. You can find resources and a tutorial in the [Mobile and Offline Developer Guide](#). To test your sandbox environments, you can also use the [emulator](#) for Android and the [simulator](#) for iOS. If the simulator and emulator are installed, you can directly access debug builds for [iOS](#) and for [Android](#).

Trailblazer Communities and Customer Support

If you require further support, don't worry, we've got your back!

[Salesforce Trailblazer Communities](#) can also help you prepare for and implement testing. These communities include everything from training material to ways to connect with other users.

And, if you encounter an issue or require additional support, contact [Salesforce Customer Support](#). If you find an issue only happens on the beta version, share about it in your case details.

Sign Up for the Field Service Mobile App Beta Program for Android

All users of Salesforce Field Service software packages can access our beta builds. You can access beta versions of our Field Service mobile application for Android in the Google Play store.

Important: You can have only one version of the Field Service mobile app installed on your device at any given time. To switch back to the public version of the app after installing the beta version, uninstall the beta version and then install the public version of the app from Google Play. Although you have to leave the beta program to install the public version, you can always join the beta program again in the future, as needed.

1. Find and select the Field Service mobile application in the Google Play store.
2. Locate the option to become a beta tester, and then click **Join**. Google Play appends (Beta) to the application name and serves the latest beta version when the application loads.

Sign Up for the Field Service Mobile App Beta Program for iOS

All users of Salesforce Field Service software packages can access our beta builds. You can access beta versions of our Field Service mobile application for iOS via TestFlight. TestFlight is an app that Salesforce uses to share beta versions of the Salesforce Field Service mobile app.

Important: You can have only one version of the Field Service mobile app installed on your device at any given time. The beta version of the app replaces the App Store version on your device.

To receive notifications when the latest beta versions become available, be sure that you enable push and email notifications for the TestFlight application.

1. Download the [TestFlight](#) app on your iOS device.
2. On your device, open this [signup link](#).
3. Click **Accept**, and then click **Install**.
After the beta version of the app is installed, TestFlight notifies you when a new build is available. TestFlight also provides instructions on how to install the new beta version and offers easy ways to provide feedback.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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To access the Field Service mobile app, users need the Field Service Mobile user license.

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To access the Field Service mobile app, users need the Field Service Mobile user license.

Channels for Providing Feedback on Beta Releases

You can provide feedback on beta releases at any time. Feedback helps our customer support and engineering teams improve your experience with Salesforce Field Service by better understanding your experiences with the app. You can provide feedback through a number of channels.

TestFlight

If the app crashes while you're testing a beta build in iOS, an alert asks if you want to send crash details through TestFlight. When the crash alert displays, click **Share**, add any comments about the crash, and then submit the crash details. To provide generic feedback via the TestFlight application, click **Send Beta Feedback**.

Application Settings

- Android: To provide feedback via the application settings on Android, go to Profile and then, under Settings, select **Provide Feedback**.
- iOS: To provide feedback via the application settings on iOS, go to Profile, then under Settings, select **Report an Issue**.

Support









Contact [Salesforce Customer Support](#) if you have issues with beta testing.

Trailblazer Community

Post feedback, questions, and comments to the [Field Service Mobile Application Trailblazer Community](#). We pay close attention to Trailblazer discussions to catch recurring issues and discover areas where we can improve the app.

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.

Data Type	Supported
Auto Number	
Formula	
Roll-Up Summary	
Lookup Relationships	
External Lookup Relationship	
Checkbox	 (Shows Yes/No.)
Currency	
Date	

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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To access the Field Service mobile app, users need the Field Service Mobile user license.

Data Type	Supported
Date/Time	 (The following fields are not supported: Scheduled End, Scheduled Start, Arrival Window End, Arrival Window Start.)
Email	
Geolocation	
Number	
Percent	
Phone	
Picklist	 (Picklists with fewer than six options are shown in an expanded view.)
Picklist (Multiple Select)	 (Picklists with fewer than six options are shown in an expanded view.)
Text	
Text Area	
Text Area (Long)	
Text Area (Rich)	
Text Area (Encrypted)	
Time	 (Time fields without a date are not supported.)
URL	

SEE ALSO:

[Field Service Mobile App Considerations](#)

[Customize the Field Service Mobile App](#)

Supported Barcodes

Learn about the barcodes that are compatible with the Salesforce Field Service mobile app.

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, minimum platform requirements are subject to change at the sole discretion of Salesforce, with or without advance notice.

To build your own barcode scanning experience using Lightning web components, use the Barcode Scanner plug-in. See [Scan Barcodes on a Mobile Device](#).

Device	Barcodes
Android	<ul style="list-style-type: none"> • Aztec • Codabar • Code-39 • Code-93 • Code-128 • Data Matrix • EAN-8, EAN-13 • ITF • PDF417 • QR Code • UPC-A, UPC-E
iOS	<ul style="list-style-type: none"> • Aztec • Codabar • Code-2 of 5 Interleaved, Code-2 of 5 Interleaved Checksum • Code-39, Code-39 Checksum, Code-39 Full ASCII, Code-39 Full ASCII Checksum • Code-93, Code-93i • Code-128 • Data Matrix • EAN-8, EAN-13 • GS1 Data Bar, GS1 Data Bar Expanded, GS1 Data Bar Limited • ITF-14 • Micro PDF417 • Micro QR • PDF417 • QR Code • UPC-E

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

Initial Field Values in the Field Service Mobile App

The initial value shown in a field when running a quick action depends on several factors.

When running a quick action from the mobile app, like for creating a work order, it can be difficult to identify where initial field values come from. Fields can have default values that you can find using Object Manager. Also, quick actions can have predefined values for fields. We try to use a predefined value as the initial value, and only use a different value when no predefined value exists or when offline.

The following table lists the initial field values given different criteria.

Action	Does a Predefined Value Exist?	Initial Online Value	Initial Offline Value
Create a new record	Yes	Predefined Value*	None
	No	Default Value	None
Update an existing record	Yes	Predefined Value*	Existing Value
	No	Existing Value	Existing Value

* Predefined values can contain formulas. A blank value appears if the server can't resolve the formula.

SEE ALSO:

[Set Predefined Field Values for Quick Action Fields](#)

[Offline Considerations in the Field Service Mobile App](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

Downloading the Field Service Connected App

Before you configure user access and customize the Field Service mobile app, download the connected app

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 or 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`

Apple and Google Maps provide high-level routes and ETAs in the Field Service mobile app. Android users require additional setup to get this functionality.

- FSL_Google_Maps_API set to active in Connected app
- Apex Rest Services permission enabled for their profile with access to these classes:
 - FSL_RESTController_GoogleApis_Directions
 - FSL_RESTController_GoogleApis_Requestor
 - FSL_RESTController_GoogleApis_Geo

See [Set Apex Class Access from the Class List Page](#).

SEE ALSO:

[Give Users Access to the Field Service Mobile App](#)

[Using the Field Service Mobile App](#)

[Offline Priming in the Field Service Mobile App](#)

[Let Customers Reschedule and Cancel Appointments in the Real-Time Location Component](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

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.

Object Name	Object Permission Needed	Field Permission Needed
Contact	Read	Email, Name, Phone, Title, Mobile
Service Appointment	Read	Appointment Number, Created By, Created Date, Parent Record, Parent Record Type, Parent Record Status Category
Service Appointment	Read, Edit	Address, Contact, Owner, Scheduled Start, Scheduled End, Status, Work Type
Service Resource	Read, Edit	Active, User
Work Order	Read, Create, Edit	None

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To create permission sets:


- Manage Profiles and Permission Sets

To manage users:

- Manage Users

To create service resources:

- Create on service resources

- 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. These classes enable the Android Salesforce Field Service mobile app to securely access directions and geo-coding information through Google Maps APIs:
FSL_RESTController_GoogleApis_Directions, **FSL_RESTController_GoogleApis_Geo**, and **FSL_RESTController_GoogleApis_Requestor**.
 - f. Click **Save**.

[Give Contractor Service Resources Access to the Field Service Mobile App](#)

The way you track contract work in Salesforce depends on how you want to track capacity, assign appointments, exchange data with contractors, and give them access to the Field Service mobile app. Follow these simple steps to add contractors to your database and give them the access they need.

SEE ALSO:

- [Field Service Mobile App Requirements](#)
- [Downloading the Field Service Connected App](#)
- [Set Up Inventory Access for Mobile Workers](#)
- [Field Service Permission Set Licenses](#)
- [Get the Field Service Mobile App](#)
- [Granting Access to Records with Manual Sharing](#)
- [Create Sharing Rules](#)

Give Contractor Service Resources Access to the Field Service Mobile App

The way you track contract work in Salesforce depends on how you want to track capacity, assign appointments, exchange data with contractors, and give them access to the Field Service mobile app. Follow these simple steps to add contractors to your database and give them the access they need.

Create an Account and Contacts

Create an account that represents the contractor, something like Widget Corporation 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.

[Granting Access and Permissions to Contractors](#)

To give your mobile workforce access to the Field Service mobile app, set them up with the right user license and permissions.

Granting Access and Permissions to Contractors

To give your mobile workforce access to the Field Service mobile app, set them up with the right user license and permissions.

1. Assign the Field Service user license to the user.
2. Create a Field Service permission set.
 - a. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
 - b. Click New.
 - c. Select the appropriate Field Service Mobile license for your contractor from the picklist, whether that's Customer Community Plus or Partner Community
 - 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 by clicking Object Settings, then click an object's name to modify its permissions.
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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To grant access to contractors

- Customize Application

- c. Select API Enabled.
- d. Click Save.

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.

[Customize and Extend the Field Service Mobile App with Lightning Web Components](#)

Lightning web components (LWCs) let you create your own experiences using Quick Actions to customize the app to meet your business needs. LWCs represent the best of the Salesforce platform, bringing modern web standards in performant, modular components that are easy to build.

[Manage Custom List Views](#)

List views are a great way to view, sort, and prioritize the information that is most important to your mobile workers.

[Set Up the Field Service Mobile Widget \(Beta\)](#)

Let mobile workers view appointment details, update the status of appointments from Dispatched to En Route, and navigate to appointments directly from the home screen.

[Set Up Inventory Access for Mobile Workers](#)

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.

[Set Up Multiple Inventory Locations](#)

By default, all products consumed for a work order or work order line item come from the same location. However, you can let mobile workers log product consumption from multiple locations. You might want to do this when, for example, workers provide services to multiple vendors or want separate inventories for different types of work.

[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.

[Add a Profile Tab Background Image in the Field Service Mobile App](#)

Add a background image to customize the Profile Tab in the Field Service Mobile App.

[Customize Push Notifications for the Field Service Mobile App](#)

Push notifications alert your mobile workforce to approaching appointments and scheduling changes.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

[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.

[Set Up Automatic Status Change](#)

Accurate and on-time status changes are a key part of field operations workflow. With Automatic Status Change, mobile workers can focus on their jobs and work more efficiently while the Field Service mobile app tracks status changes for them. For the back office, accurate status changes give better insight into the activity in the field without creating more work for mobile workers.

[Set Up Service Appointment Bundling for Mobile Workers](#)

To give mobile workers access to the bundled service appointments in the Field Service mobile app, you update the service appointment layout and add field permissions for mobile users.

[Set Up Optimized Image Upload](#)

Mobile workers sometimes must upload multiple images, and they want to do it quickly. You can resize images before uploading to load optimally, especially in areas of low connectivity.

[Set Up Location-Based Actions for the Field Service Mobile App \(Pilot\)](#)

Automate actions based on the location of your mobile workers. Prompt your mobile workers to complete the actions before or after their service appointments.

SEE ALSO:

[Supported Data Types in the Field Service Mobile App](#)

[Using the Field Service Mobile App](#)

Customize and Extend the Field Service Mobile App with Lightning Web Components

Lightning web components (LWCs) let you create your own experiences using Quick Actions to customize the app to meet your business needs. LWCs represent the best of the Salesforce platform, bringing modern web standards in performant, modular components that are easy to build.

Watch the video to see how LWCs can let your mobile workers find nearby records, add images to a record, and reschedule an appointment directly from the Field Service mobile app.

 [Watch a video](#)

What Can I Do with LWCs in the Field Service Mobile App?

You can create custom components that are accessed from the Actions menu. The Actions menu is available globally and on record detail pages.

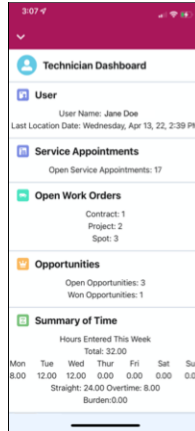
Actions built with LWCs can be simple or complex, depending on the problem you're solving, and can work even when mobile devices are offline. Use them to add and annotate an image to attach to a service report, order a part, contact a SME, or as in the following image, create a custom dashboard for your mobile workers. Use LWCs to do pretty much anything Salesforce can do.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.



Work with LWCs

Use the resources in the following table to learn about and develop with LWCs for the Field Service mobile app.

Task	Where to Find It
Learn about and develop with LWCs.	Salesforce Developers: Lightning Web Components Developer Guide
Get started with LWCs in the Field Service mobile app.	Salesforce Developers: Mobile and Offline Developer Guide
Use the open-source LWCs to find nearby resources, reschedule appointments, and upload and annotate images in the Field Service mobile app.	GitHub: LWC-Mobile-Samples <ul style="list-style-type: none"> • FindNearby • RescheduleAppointments • UploadAndAnnotateImages
Use the unlocked packages to schedule follow-up appointments and view a mobile dashboard in the Field Service mobile app.	GitHub: LWC-Mobile-Samples <ul style="list-style-type: none"> • FollowupAppointment • MobileDashboard
Create LWCs that use plug-ins.	Field Service Developer Guide: Add Lightning Web Components for Plug-Ins to the Field Service Mobile App
Find a Partner to help you develop with LWCs.	Field Service Partners: Service Max , Accenture Technology , Cognizant , Nexavenu , PwC , Thunder Consulting Inc. (Stephen Hupp stephen.hupp@thundersf.com), Blue Hike (Ron van Loon ron.van.loon@bluehike.com)

Manage Custom List Views

List views are a great way to view, sort, and prioritize the information that is most important to your mobile workers.

View Records

In a list view, you can view details about a record by clicking it. You see only the data that you have access to. You can view records that you own, have read or write access to, or are shared with you. List views also include records owned by or shared with users in roles below you in the hierarchy. The fields you see depend on your page layout and field-level security settings.

When you access a tab, the default list view assigned to the object is shown. To switch to a different list view, click the app bar and then select from the available lists.

Search List Views

Use the list view search box to search for records in a list view. Click the search box, enter your query, and press Enter. The list view search looks at all searchable fields even if the corresponding columns aren't shown in the list view. In your search, you can enter any special character except for the % since it's treated as a wildcard.

Things to Know

- Custom list view is a feature created for Salesforce Lightning Design System (SLDS) users. This feature doesn't support users who aren't on SLDS.
- The Most Recently Used list view isn't supported. When accessed, it doesn't return records, and an error is returned.
- Limitations apply to what filter configurations are supported. When encountered, no records are returned and an error is shown. Here's a list of known filters that aren't supported in mobile list views. Other filters not in this list can apply.
 - A filter that uses a multiple currency field
 - A filter that uses a locale and org-based date literal (for example, THIS WEEK, THIS FISCAL QUARTER)LAST_WEEKTHIS_WEEKNEXT_WEEKN_WEEKS_AGOLAST_N_WEEKSNEXT_N_WEEKS
 - A filter that uses a polymorphic field
 - A filter that uses a number *n type* date literal
 - LAST_N_QUARTERS
 - NEXT_N_QUARTERS
 - LAST_N_YEARS
 - NEXT_N_YEARS
 - N_DAYS_AGO
 - N_MONTHS_AGO
 - N_QUARTERS_AGO
 - N_YEARS_AGO
 - A filter that uses an unsupported scope
 - In some cases, new records aren't shown on certain custom list views. For example, in a Case custom list view that filters on closed = false, a new offline Case record isn't shown on the list view because closed isn't populated. The filtering criteria don't apply to this record.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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To access the Field Service mobile app, users need the Field Service Mobile user license.


- In some cases, a record created offline doesn't show all the details in the card for the record. For example, if a contact is created with the first name and last name but the header of the card uses name only. The header can be blank because the name field isn't populated.
- Fields that have a reference that could be many different things, a reference to either a group or a user, aren't supported.

Performance Considerations

- The number of objects in your database can impact the performance of custom list views.
- The number of fields entered when you're performing a search can also affect performance.
- Your current network speed can affect the performance of network requests.

Set Up the Field Service Mobile Widget (Beta)

Let mobile workers view appointment details, update the status of appointments from Dispatched to En Route, and navigate to appointments directly from the home screen.

 **Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

[Create a Status Change Flow](#)

Set up a flow that updates the status of a service appointment to En Route. This flow is mandatory and is the only flow that the widget supports.

[Create an Action](#)

Set up an action that triggers the flow.

[Add the Action to the Layout](#)

Add the action to the layout that the mobile workers see in the Field Service mobile app.

[Update the Profiles](#)

Update the mobile workers' permissions so that they can run the flow from the Field Service mobile app.

[Define the Information Shown in the Widget](#)

Define a default list view that determines which fields are shown for each service appointment in the widget.

[Verify the Widget](#)

Make sure the widget is working as expected and get your mobile workers to use it.

SEE ALSO:

[Add the Field Service Mobile Widget \(Beta\)](#)

Create a Status Change Flow

Set up a flow that updates the status of a service appointment to En Route. This flow is mandatory and is the only flow that the widget supports.

1. From Setup, in the Quick Find box, enter Process Automation, and then select Flows.
2. Click New Flow.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.




USER PERMISSIONS

To edit object permissions:

- Manage Profiles and Permission Sets

To create a flow in Flow Builder:



- Manage Flow

3. In the All + Templates tab, select Field Service Mobile Flow, and click Create.
4. Create a resource for the Service Appointment object.
 - a. In the Flow Builder, click  to open the toolbox.
 - b. Click **New Resource**.
 - c. For Resource Type, select **Variable**.
 - d. For API Name, enter `Service_Appointment`.
 - e. For Data Type, select **Record**.
 - f. For Object, find and select **Service Appointment**.
 - g. For Availability Outside the Flow, select **Available for input**.
 - h. Click **Done**.
5. Create a resource for the ID.
 - a. From the toolbox, click **New Resource**.
 - b. For Resource Type, select **Variable**.
 - c. For API Name, enter `Id`.
 - d. For Data Type, select **Text**.
 - e. For Availability Outside the Flow, select **Available for input**.
 - f. Click **Done**.
6. Add a Get Records element to the flow.
 - a. To add an element to the flow, from the main area of the flow builder, between the Start and End elements, hover over  and click .
 - b. Scroll down to the Data section and select **Get Records**.
 - c. Enter a name for the label. The API Name is entered for you.
 - d. Under Get Records of This Object, for Object, find and select **Service Appointment**.
 - e. Under Filter Service Appointment Records: For Condition Requirements, select **All Conditions Are Met (AND)**.
 - f. For Field, find and select **Id**.
 - g. For Operator, select **Equals**.
 - h. For Value, find and select **Id**.



Field	Operator	Value
Id	Equals	Id

- i. Under Select Variable to Store Service Appointment, for Record, select **Service_Appointment**.
 - j. Under Select Service Appointment Fields to Store in Variable, for Field, find and select **Status**.
7. Add an Update Records element to the flow.

- a. To add an element to the flow, from the main area of the flow builder, between the Start and End elements, hover over  and click .
- b. Scroll down to the Data section and select **Update Records**.
- c. Enter a name for the label. The API Name is entered for you.
- d. For How to Find Records to Update and Set Their Values, select **Specify conditions to identify records, and set fields individually**.
- e. Under Update Records of This Object Type, for Object, find and select **Service Appointment**.
- f. Under Filter Service Appointment Records, for Condition Requirements to Update Records, select **All Conditions Are Met (AND)**.
- g. For Field, find and select **Id**.
- h. For Operator, select **Equals**.
- i. For Value, find and select **ServiceAppointment** and then select **Id**.



- j. Under Set Field Values for the Service Appointment Records, for Field, find and select **Status**.
 - k. For Value, select **En Route**.
8. Save and activate the flow.
 - a. In the Flow Builder, click **Save**.
 - b. In the Save the flow window, enter a name for the Label. The API Name is entered for you.
 - c. Save your changes and activate the flow.


Create an Action

Set up an action that triggers the flow.

1. From Setup, go to the Object Manager tab.
2. In the Quick Find box, enter *Service Appointment*, and then select **Service Appointment**.
3. In the Buttons, Links, and Actions tab, click **New Action**.
4. For Action Type, select **Flow**.
5. For Flow, select the flow that you created.
6. For Label, enter *Change Status to En Route*. The Name field is entered for you.
7. Change the name to *ChangeStatusEnRoute*.
8. Save your changes.

Add the Action to the Layout

Add the action to the layout that the mobile workers see in the Field Service mobile app.

1. From the Service Appointment object, open the Page Layouts tab.
2. In the row of the required page layout, click the arrow and select **Edit**.
 -  **Tip:** If you're not sure which page layout is in use, click **Page Layout Assignment**.
3. Click **Mobile Lightning & Actions**.
4. Drag the action that you created into the Salesforce Mobile and Lightning Experience Actions section.
5. Save your changes.

Update the Profiles

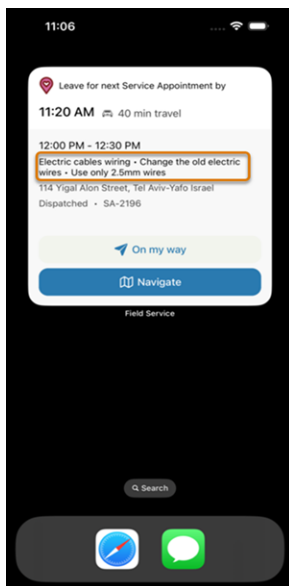
Update the mobile workers' permissions so that they can run the flow from the Field Service mobile app.

1. From Setup, in the Quick Find box, enter *users*, and then select **Profiles**.
2. Edit the required profile.
3. Under General User Permissions, select **Run Flows**.
4. Save your changes.


Define the Information Shown in the Widget

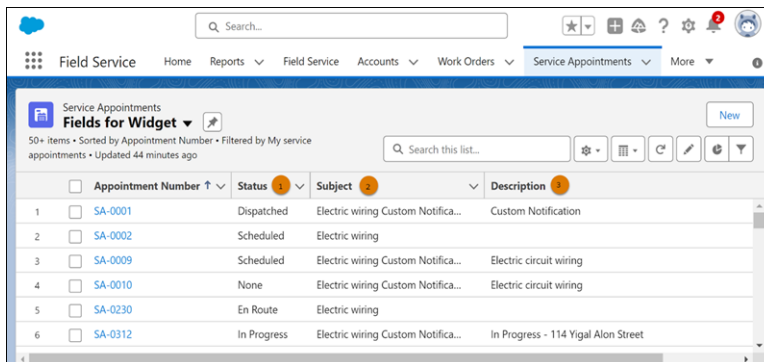
Define a default list view that determines which fields are shown for each service appointment in the widget.

The three values separated by dots are determined by the order of the fields in the default list view of the Field Service Mobile Settings that are associated with the mobile worker's profile.



1. Locate a list view that has the fields sorted according to the order that you want to show in the widget, or create one for this purpose.
 - a. From Field Service, open the Service Appointments tab.
 - b. From List View Controls, click **New**.

- c. Enter the details.
 -  **Tip:** Copy the List API Name for later use.
- d. Save the view.
- e. From List View Controls, click **Select Fields to Display**.
- f. Customize the view so that the second, third, and fourth columns show the fields that you want to include in the widget. The first column is ignored for this purpose. In this example, Status is first, Subject is second, and Description is third.




	Appointment Number	Status	Subject	Description
1	SA-0001	Dispatched	Electric wiring Custom Notifica...	Custom Notification
2	SA-0002	Scheduled	Electric wiring	
3	SA-0009	Scheduled	Electric wiring Custom Notifica...	Electric circuit wiring
4	SA-0010	None	Electric wiring Custom Notifica...	Electric circuit wiring
5	SA-0230	En Route	Electric wiring	
6	SA-0312	In Progress	Electric wiring Custom Notifica...	In Progress - 114 Yigal Alon Street

2. Define this list view as the default.
 - a. From Setup, in the Quick Find box, enter *Field Service Mobile*, and then select **Field Service Mobile Settings**.
 - b. In the settings that are assigned to your mobile workers, click the arrow and select **Show Details**.
 - c. Under Customization, in Default List View Developer Name, enter the API name of the list view that you created.

Verify the Widget

Make sure the widget is working as expected and get your mobile workers to use it.

1. From the Field Service Dispatcher Console, assign a service appointment to a user with the profile that has the Run Flows user permission.
2. Change the status of the service appointment to Dispatched.
3. On an iOS mobile device, add the widget to the home screen.
4. Log in to the Field Service mobile app as the user that you assigned the service appointment to.
5. Check the widget to make sure that you're seeing the dispatched service appointment.
6. Instruct your mobile workers to add the Field Service mobile widget to the home screen of their iOS mobile devices.

 **Note:** If there are more service appointments on today's schedule but they're in the Completed, Cannot Complete, or Canceled status categories, the widget shows that nothing else is scheduled for today.

SEE ALSO:

[Apple Developer Guide: Keeping a widget up to date](#)

[Add the Field Service Mobile Widget \(Beta\)](#)

Set Up Inventory Access for Mobile Workers

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](#).

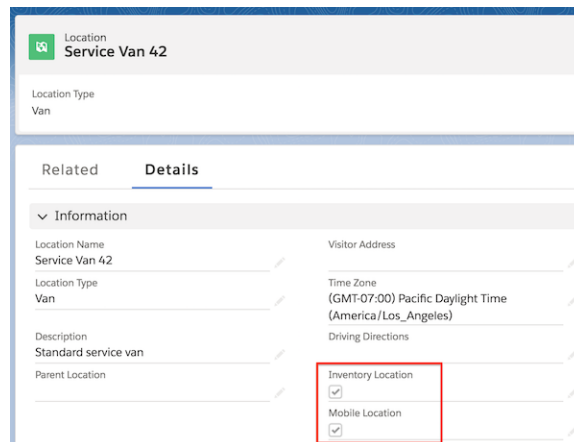
Show the Inventory Tab (Android and iOS)

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.



The screenshot shows the Salesforce interface for a Location record named "Service Van 42". The "Details" tab is active, displaying a list of fields. The "Inventory Location" and "Mobile Location" checkboxes are highlighted with a red box, indicating they are selected. Other fields include Location Name, Location Type, Description, Parent Location, Visitor Address, Time Zone, and Driving Directions.

Information	
Location Name	Service Van 42
Location Type	Van
Description	Standard service van
Parent Location	
Visitor Address	
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Driving Directions	
Inventory Location	<input checked="" type="checkbox"/>
Mobile Location	<input checked="" type="checkbox"/>

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To update page layouts:

- Customize Application

To update connected apps:

- Customize Application

AND either

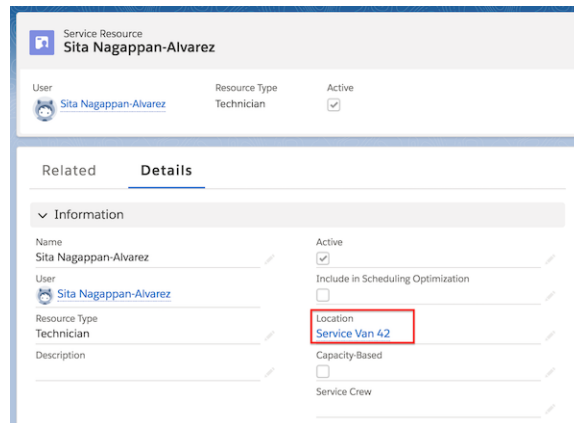
Modify All Data

OR

Manage Connected Apps

-

Because this service resource is associated with the location, the user sees the Inventory tab in the app.

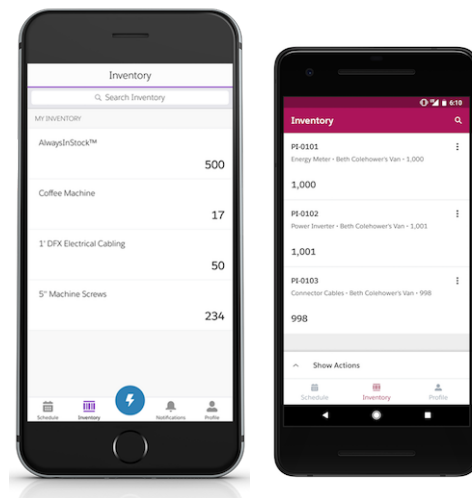


Manage Inventory in the Field (Android and iOS)

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 shows up to 1,000 products. To see inventory for locations added during an active mobile session, log out and then log back in.

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 in Field Service](#).

Let Users Add Required Products (Android and iOS)

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 in Field Service](#).

Hide the Inventory Tab (Android and iOS)

If your mobile workers no longer require access to the Inventory tab, you can hide it. After you complete the steps, users must log out and log in to the Field Service mobile app to see the changes.

1. From Setup, in the Quick Find box, enter **Permission Sets**, and then select **Field Service Mobile License**. Then, go to **Object Settings**, and remove access for Product Item and Product Requests.
2. In the Quick Find box, enter **Service Resource Layout**. Remove the Location field from the Field Service layout.
3. To clear the cache metadata in the mobile app, go to **Settings** in the **Profile**. Select **Advanced Settings**, and then select **Clear Cached Metadata**.

SEE ALSO:

- [Field Service Permission Set Licenses](#)
- [Give Users Access to the Field Service Mobile App](#)
- [Set Up Your Field Service Inventory](#)
- [Set Up Product Requests in the Field Service Mobile App](#)
- [Set Up Multiple Inventory Locations](#)
- [Set Up Your Field Service Inventory](#)
- [Set Up Product Requests in the Field Service Mobile App](#)

Set Up Multiple Inventory Locations

By default, all products consumed for a work order or work order line item come from the same location. However, you can let mobile workers log product consumption from multiple locations. You might want to do this when, for example, workers provide services to multiple vendors or want separate inventories for different types of work.

1. Enable multiple inventory locations in the connected app.
 - a. From Setup, enter *Connected Apps* in the Quick Find box, then select **Connected Apps**.
 - b. Click **Salesforce Field Service for iOS** or **Salesforce Field Service for Android**.
 - c. Scroll to the custom attribute list, and click **New**.
 - d. Enter the attribute key *ENABLE_MULTIPLE_LOCATIONS*.
 - e. To enable consuming parts from multiple locations, enter the attribute value *TRUE*.
When this setting is enabled, users see the following locations for product items in their search results.
 - Locations that belong to the same hierarchy as the user's own location
 - Locations that are associated with a work order on the user's schedule
 - Locations that are associated with the user's service territory

2. Create a parent location.
 - a. From the App Launcher, find and open **Locations**.
 - b. Click **New**.
 - c. Enter the details for your new location.
 - For Location Name, enter a name for your location.
 - For Location Type, select which type of location it is.
 - For Time Zone, select the time zone that the location is in.
 - Select **Inventory Location** and **Mobile Location**.
 - Optionally, enter a description and driving directions for the location.
 - d. Click **Save**.

3. Create child locations.
 - a. From the App Launcher, find and open **Locations**.
 - b. Click **New**.
 - c. Enter the details for each new location. For Parent Location, select the location that you created.
 - d. Click **Save**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To update page layouts:

- Customize Application

To update connected apps:

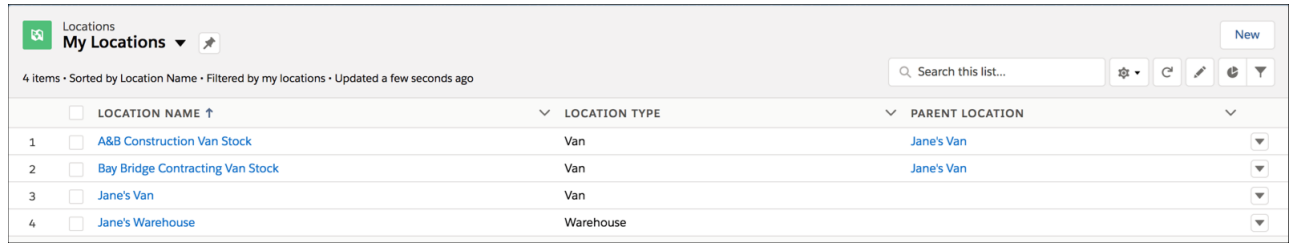
- Customize Application

AND either

Modify All Data

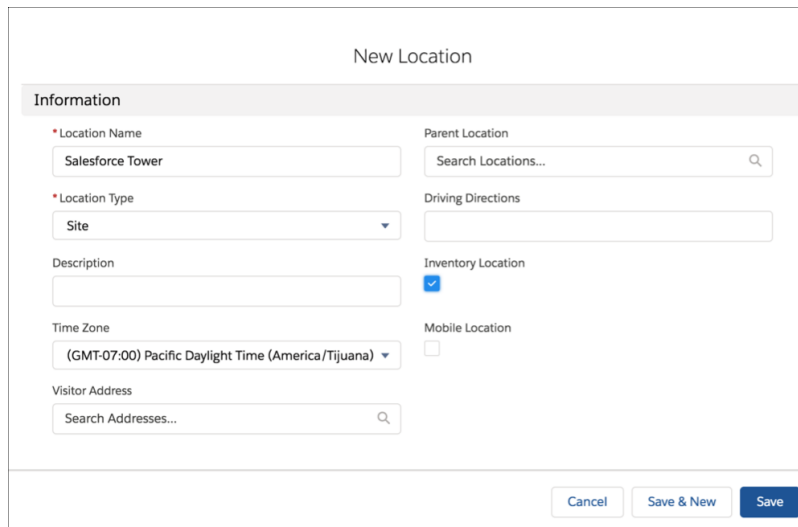
OR

Manage Connected Apps



	LOCATION NAME ↑	LOCATION TYPE	PARENT LOCATION
1	<input type="checkbox"/> A&B Construction Van Stock	Van	Jane's Van
2	<input type="checkbox"/> Bay Bridge Contracting Van Stock	Van	Jane's Van
3	<input type="checkbox"/> Jane's Van	Van	
4	<input type="checkbox"/> Jane's Warehouse	Warehouse	

4. Create consignment locations. A consignment location represents an inventory location at the site of a work order or work order line item. For example, you can use a consignment location for parts shipped directly to a work site.
 - a. From the App Launcher, find and open **Locations**.
 - b. Click **New**.
 - c. Enter the details for your new location. Select **Inventory Location** so that parts can be stored there.



New Location

Information

* Location Name

Parent Location

* Location Type

Driving Directions

Description

Inventory Location

Time Zone

Mobile Location

Visitor Address

- d. Click **Save**.
5. Create product items for the consignment location.
 - a. From the App Launcher, find and open **Product Items**.
 - b. Click **New**.
 - c. Enter the details for your new product item.

The screenshot shows a 'New Product Item' form. The 'Information' section includes:

- Product Name:** Electric Cable
- Location:** Salesforce Tower
- Quantity On Hand:** 5.00
- Quantity Unit Of Measure:** Each
- Serial Number:** 001122

Buttons at the bottom: Cancel, Save & New, Save.

- For Product Name, select a product.
- For Location, select the consignment location that you created.
- For Quantity on Hand, select the number of products available at that location.
- Optionally, select a Quantity Unit of Measure and enter the product's serial number.

d. Click **Save**.

6. Create cross-border locations. A cross-border location represents an inventory location that belongs to a specific service territory.

a. Add the Service Territory Locations related list to the Service Territory layout.

- From the Object Manager, enter *Service Territory* in the Quick Find box, and select **Service Territory**.
- Select **Page Layouts**.
- Select **Service Territory Layout**.
- Drag **Service Territory Locations** under Related Lists.
- Click **Save**.

b. Add a location to a service territory.

The screenshot shows a 'New Service Territory Location' form. The 'Information' section includes:

- Service Territory:** San Francisco
- Location:** Salesforce Tower

Buttons at the bottom: Cancel, Save & New, Save.

- From the App Launcher, find and open **Service Territory**.
- Select the service territory that you want to add a location to.
- Click **Related**.
- Next to Service Territory Locations, click **New**.
- Select a location.
- Click **Save**.

- For the setup to take effect, have each user log out and log back.
- Consuming product items from multiple locations is a beta feature. Up to 10 hierarchical locations or cross-border locations are supported, with a maximum of 1,000 product items for each location.
- When a location is associated with a service resource, only direct parent-child locations are supported. Grandchild locations are not supported.
- When a location is associated with a work order or a service territory location, parent-child relationships aren't used.
- Child locations of consignment locations and cross-border locations aren't available in the app.
- To make a location available in the inventory tab in the app, select **Mobile Location**.
- For cross-border locations, don't select the Mobile Location field. When the Mobile Location field is selected, the location isn't available in the app.

SEE ALSO:

[Set Up Inventory Access for Mobile Workers](#)


[Set Up Product Requests in the Field Service Mobile 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.
 - a. To edit that configuration, click **Edit**.
 - b. 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 Tabs with the Field Service Mobile App Builder](#)

The Field Service Mobile App Builder is a point-and-click tool that lets you configure custom tab navigation and give users quick access to screens and records based on their role.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To configure Field Service Mobile Settings:

- **Customize Application**

[Learn More About Field Service Mobile Settings](#)

Customize your Field Service Mobile Settings configurations to suit your users' needs.

[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.

SEE ALSO:

[Brand the Field Service Mobile App](#)[Track Service Resource Geolocation with the Field Service Mobile App](#)[Set Up Custom Actions in the Field Service Mobile App](#)[Brand the Field Service Mobile App](#)

Customize Tabs with the Field Service Mobile App Builder

The Field Service Mobile App Builder is a point-and-click tool that lets you configure custom tab navigation and give users quick access to screens and records based on their role.

With the Field Service Mobile App Builder you can:

- Rename tabs
- Define new tabs
- Reorder tabs
- Delete tabs
- Change tab icons
- Assign tabs to navigate to native Field Service screens, some object list views, and Lightning web components.

[Field Service Mobile App Builder Considerations and Limitations](#)

Before you start working with the Field Service Mobile App Builder, here are some things to know.

[Set Up User Permissions](#)

Assign admin permissions to enable you to work with the Field Service Mobile App Builder.

[Create a Configuration](#)

Use the Field Service Mobile App Builder to configure what tabs are available within the Field Service mobile app and assign those configurations to profiles.

[Explore the User Interface](#)

The Field Service Mobile App Builder user interface makes configuring navigation tabs easy.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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To access the Field Service mobile app, users need the Field Service Mobile user license.

Field Service Mobile App Builder Considerations and Limitations

Before you start working with the Field Service Mobile App Builder, here are some things to know.

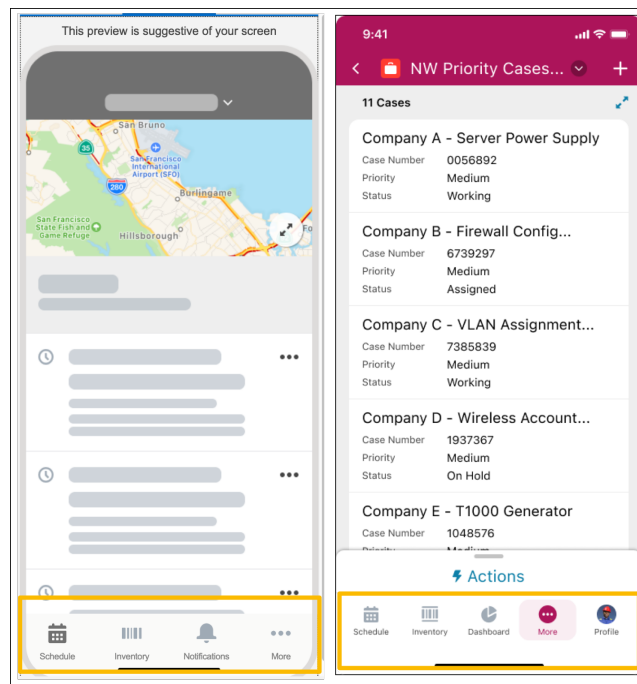
- The Profile tab in the Field Service mobile app is fixed on the right side of the tab bar. Because you can't modify its location and function, it isn't shown in the mobile app builder.
- The number of tabs shown in the mobile app builder canvas doesn't match what the user sees on the actual mobile device. In the canvas, four tabs are shown. On the actual mobile device, five tabs are shown, where the fifth is always the Profile tab. The Profile tab in the Field Service mobile app is fixed on the tab bar and can't be modified, so it isn't shown in the mobile app builder.

EDITIONS

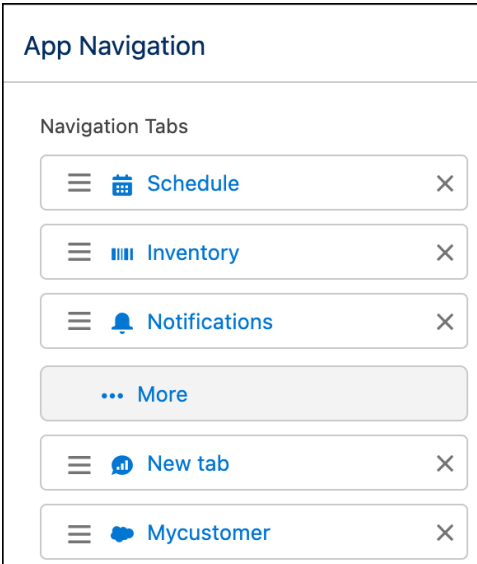
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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To access the Field Service mobile app, users need the Field Service Mobile user license.



The properties pane correctly shows the More tab as the fourth tab and doesn't show the Profile tab.



Set Up User Permissions

Assign admin permissions to enable you to work with the Field Service Mobile App Builder.

1. From Setup, in the Quick Find box, enter *Permissions Sets*, and then select **Permission Sets**.
2. Click **Create**.
3. In the System panel, click **System Permissions**.

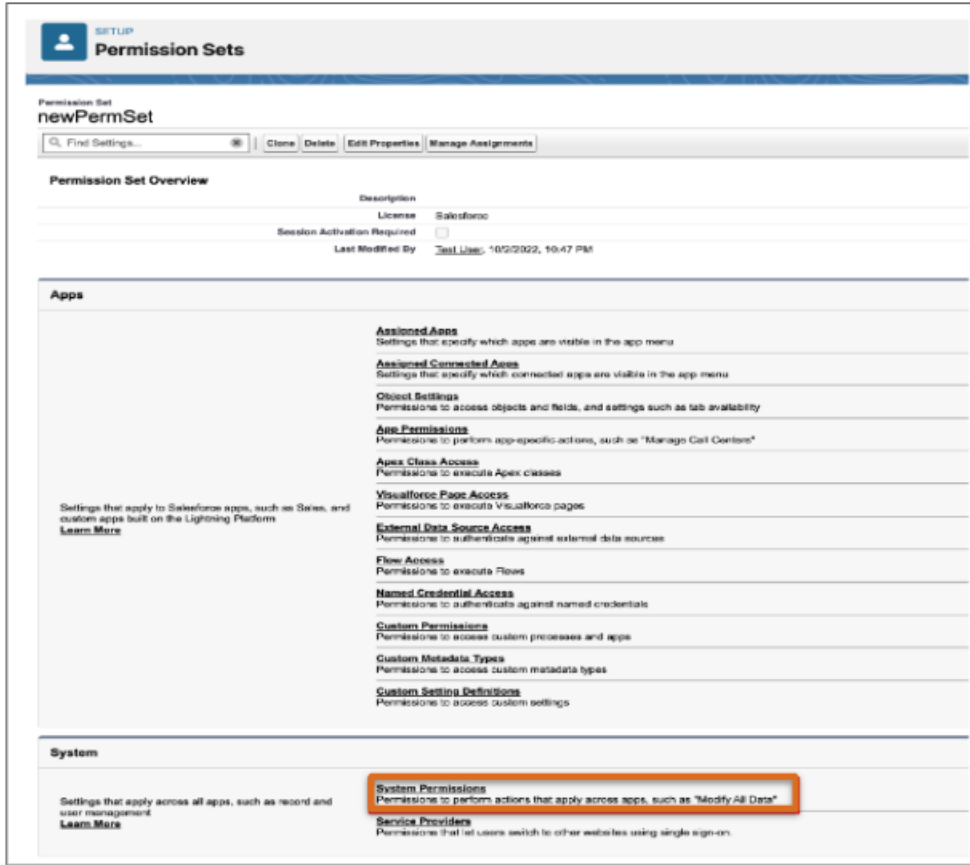
USER PERMISSIONS

For admins to create and manage email templates and content in a builder:

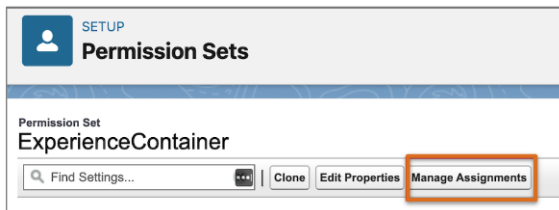
- Access drag-and-drop content builder and Customize application

For mobile app users to customize using App Setup menu options:

- Custom applications for Field Service mobile



4. To enable Access drag-and-drop content builder and Customize application, click the box next to these features.
5. To assign admin permissions, click **Manage Assignments**.



6. Click the box next to the admin account, and then click **Assign**.



Create a Configuration

Use the Field Service Mobile App Builder to configure what tabs are available within the Field Service mobile app and assign those configurations to profiles.

1. From Setup, in the **Quick Find** box, enter *Field Service Mobile App Builder*, and then select **Field Service Mobile App Builder**.



2. Click **New Configuration**.
3. Give your configuration an app name.
4. To populate the API Name field, click in the box, and then click **Save**.

The Field Service Mobile App Builder user interface opens.

Explore the User Interface

The Field Service Mobile App Builder user interface makes configuring navigation tabs easy.

USER PERMISSIONS

For admins to create and manage email templates and content in a builder:

- Access drag-and-drop content builder and Customize application

For mobile app users to customize using App Setup menu options:

- Custom applications for Field Service mobile

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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To access the Field Service mobile app, users need the Field Service Mobile user license.

The screenshot displays the 'Field Service Mobile App Builder' interface. At the top, a dark blue header contains a back arrow, a mobile phone icon, and the text 'Field Service Mobile App Builder'. Below the header, a white bar shows the app's status as 'Draft - Modified 4 hours ago' with a green checkmark and a 'Publish' button. The main area features a large preview of a mobile app screen. The preview is titled 'This preview is suggestive of your screen' and shows a map of the San Francisco area with labels for San Bruno, San Francisco International Airport (SFO), Burlingame, Hillsborough, and San Francisco State Fish and Game Refuge. Below the map are three placeholder cards, each with a clock icon, a title bar, and three horizontal lines representing text. At the bottom of the preview is a navigation bar with three tabs: 'Schedules' (calendar icon), 'Inventory' (list icon), and 'Notifications' (megaphone icon). A plus sign in a circle is located below the navigation bar. To the right of the preview is a sidebar titled 'App Navigation' with a plus sign in a circle. Under the title, it says 'Navigation Tabs' and lists three tabs: 'Schedules' (calendar icon), 'Inventory' (list icon), and 'Notifications' (megaphone icon). Below these is a '+ Add Tab' button.

Here's a breakdown of the parts of the tool.

The header shows you the label of your page. From here you can return to Setup without saving by clicking the **Back** arrow. (1)

The page canvas area is a preview of your screen. Rearranging or changing the navigation tabs changes the preview. (2)

In the status bar, you can check whether your configuration is active or a draft, see when it was last modified, and publish or save. (3)

From the Properties pane, you can reorder tabs, remove tabs, add new tabs, or click into tabs to make edits. Clicking into a tab lets you change the page type and its properties, rename the tab, and change the icon. (4)

[Work with Tabs](#)

Choose tab types and their placement, and add other customizations to create workflows optimized for your users.

[Publish a Configuration](#)

Give users access to your customized tabs in the Field Service mobile app.

[Work with a Configuration](#)

After you create a custom configuration, you can easily change its style, function, or assignment.

Work with Tabs

Choose tab types and their placement, and add other customizations to create workflows optimized for your users.

[Assign a Native Field Service Page to a Tab](#)

Improve workflows for your users by creating tabs for frequently accessed information.

[Assign a List View Page to a Tab](#)

Create tabs containing list views so your users can easily see what's needed to get the job done.

[Change the Icon for a Tab](#)

Style your tabs so users know the tabs' function at a glance.

[Assign a Lightning Web Component \(LWC\) Page to a Tab](#)

Extend tab functionality with Lightning web components.

[Reorder Tabs](#)

Change tab order to work efficiently for your users.

[Delete a Tab](#)

Change tab order to work efficiently for your users.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

Assign a Native Field Service Page to a Tab

Improve workflows for your users by creating tabs for frequently accessed information.

1. In the properties pane, click the tab that you want to assign to a page, or click **+ Add Tab**.
2. Under Page Type, select **Salesforce Field Service**.
3. Select which Field Service Page to navigate to: **Inventory, Notifications, or Schedule**.
4. Name the tab in the Tab Label field.
5. In the status bar, click **Save**.
6. To return to the full list of navigation tabs, use the back arrow in the properties pane.

Assign a List View Page to a Tab

Create tabs containing list views so your users can easily see what's needed to get the job done.

1. In the properties pane, click the tab that you want to assign a page or click **+ Add Tab**.
2. Under Page Type, select **List View**.
3. Select which object you want to create a list from.
4. If it's allowed for the object type, choose how to filter the list.
5. Name the tab in the Tab Label field.
6. In the status bar, click **Save**.
7. To return to the full list of navigation tabs, use the back arrow in the properties pane.

Change the Icon for a Tab

Style your tabs so users know the tabs' function at a glance.

User Permissions Needed

For admins to create and manage email templates and content in a builder: Access drag-and-drop content builder and Customize application

For mobile app users to customize using App Setup menu options: Custom applications for Field Service mobile

1. To change the icon, in the properties pane, click the tab, or click **+ Add Tab**.
2. Click the **X** next to the current icon, and then click **Select Icon**.
3. Choose an icon and click **Select**.
4. Click **Save**.
5. In the status bar, click **Save**.
6. To return to the full list of navigation tabs, use the back arrow in the properties pane.

USER PERMISSIONS

For admins to create and manage email templates and content in a builder:

- Access drag-and-drop content builder and Customize application

For mobile app users to customize using App Setup menu options:

- Custom applications for Field Service mobile

USER PERMISSIONS

For admins to create and manage email templates and content in a builder:

- Access drag-and-drop content builder and Customize application

For mobile app users to customize using App Setup menu options:

- Custom applications for Field Service mobile

Assign a Lightning Web Component (LWC) Page to a Tab

Extend tab functionality with Lightning web components.

1. In the properties pane, click the tab that you want to assign a page or click **+ Add Tab**.
2. Under Page Type, select **Lightning Web Component (LWC)**.
3. Choose which LWC Page for the tab to navigate to.
The list is based on which global quick actions you created
4. Name the tab in the Tab Label field.
5. To change the icon, click the **X** next to the current icon, and then click **Select Icon**.
6. Choose an icon and click **Select**.
7. In the status bar, click **Save**.
8. To return to the full list of navigation tabs, use the back arrow in the properties pane.

Reorder Tabs


Change tab order to work efficiently for your users.

1. In the properties pane, find the tab you want to move.
2. Drag the tab above or below other tabs until you see the + icon. Changing the order of the tabs can change which tabs are moved onto the More page.

Delete a Tab

Change tab order to work efficiently for your users.

1. In the properties pane, find the tab you want to delete.
2. Click the **X** next to the tab's name.

 **Warning:** You don't receive a confirmation when you click the **X** to delete the tab. You can't undo this action.

Publish a Configuration

Give users access to your customized tabs in the Field Service mobile app.

User Permissions Needed

For admins to create and manage email templates and content in a builder:	Access drag-and-drop content builder and Customize application
For mobile app users to customize using App Setup menu options:	Custom applications for Field Service mobile

USER PERMISSIONS

For admins to create and manage email templates and content in a builder:

- Access drag-and-drop content builder and Customize application

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USER PERMISSIONS

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USER PERMISSIONS

For admins to create and manage email templates and content in a builder:

- Access drag-and-drop content builder and Customize application

For mobile app users to customize using App Setup menu options:

- Custom applications for Field Service mobile

1. From the Mobile App Builder status bar, click **Publish**.
The Publish button is available when the configuration is in a draft state (if it has never been published or when changes occurred since the last publish date).
2. Select the profiles that can view your app configuration.
3. If no conflicts exist, click **Assign**.
4. If conflicts exist, click **Next**.
5. Review the assignment changes you're about to make. Take one of these actions.
 - Confirm that you want to override the current assignments and click **Override & Publish**.
 - To change the selected assignments, click **Cancel & Back**.

Work with a Configuration

After you create a custom configuration, you can easily change its style, function, or assignment.

[Edit Your Custom Tabs Configuration](#)

Improve tabs to better suit your users' needs.

[Edit the App Name](#)

Change the app name to suit your needs or add clarity on its purpose.

[Assign Profiles to a Configuration](#)

Choose who sees the custom configuration in their Field Service mobile app based on user preferences and needs.

[Clone a Configuration](#)

Make your work customizing configurations for multiple users go more quickly.

[Delete a Configuration](#)

Remove unneeded custom configurations.

Edit Your Custom Tabs Configuration

Improve tabs to better suit your users' needs.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

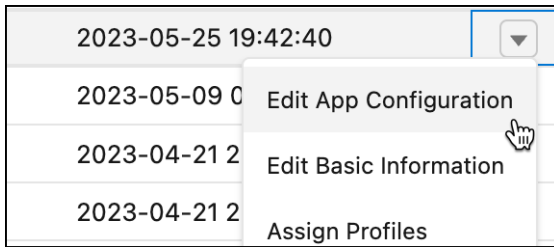
To access the Field Service mobile app, users need the Field Service Mobile user license.

User Permissions Needed

For admins to create and manage email templates and content in a builder: Access drag-and-drop content builder and Customize application

For mobile app users to customize using App Setup menu options: Custom applications for Field Service mobile

1. From Setup, in the Quick Find box, enter *Field Service Mobile App Builder*, and then select **Field Service Mobile App Builder**.
2. In the App Configurations pane, click the dropdown next to the selected configuration, and then select **Edit App Configuration**.



This action opens the mobile app builder user interface where you can rename, reorder, delete, and add tabs.

Edit the App Name


Change the app name to suit your needs or add clarity on its purpose.

User Permissions Needed

For admins to create and manage email templates and content in a builder: Access drag-and-drop content builder and Customize application

For mobile app users to customize using App Setup menu options: Custom applications for Field Service mobile

1. From Setup, click the dropdown next to the selected configuration and select **Edit Basic Information**.
2. Edit the App Name field, and then click **Save**.

 **Note:** You can't edit the API name.

Assign Profiles to a Configuration

Choose who sees the custom configuration in their Field Service mobile app based on user preferences and needs.

1. Assign profiles from within Setup or in the mobile app builder user interface.
 - a. From Setup, click the dropdown next to the selected configuration, and then select **Assign Profiles**.
 - b. Select the profiles that can view your app configuration.
 - c. If no conflicts exist, click **Assign**.
 - d. If conflicts exist, click **Next**.
 - e. Review the assignment changes you're about to make. Take one of these actions.
 - Confirm that you want to override the current assignments and click **Override & Publish**.
 - To change the selected assignments, click **Cancel & Back**.
 - Assign profiles from the mobile app builder user interface.
2. In the App Configurations pane, click the app you want to open.
 - a. Click **Publish**.

The Publish button is available when the configuration is in a draft state (if it has never been published or when changes occurred since the last publish date).

USER PERMISSIONS

For admins to create and manage email templates and content in a builder:

- Access drag-and-drop content builder and Customize application

For mobile app users to customize using App Setup menu options:

- Custom applications for Field Service mobile

- b. Select the profiles that can view your custom app configuration.
- c. If no conflicts exist, click **Assign**.
- d. If conflicts exist, click **Next**.
- e. Review the assignment changes you're about to make. Take one of these actions.
 - Confirm that you want to override the current assignments and click **Override & Publish**.
 - To change the selected assignments, click **Cancel & Back**.

Clone a Configuration

Make your work customizing configurations for multiple users go more quickly.

User Permissions Needed


For admins to create and manage email templates and content in a builder: Access drag-and-drop content builder and Customize application

For mobile app users to customize using App Setup menu options: Custom applications for Field Service mobile

1. From Setup, click the dropdown next to the selected configuration, and then select **Clone**.
2. Edit the App Name field.
3. Edit the API Name field.
4. Click **Save**.

Delete a Configuration

Remove unneeded custom configurations.

-  **Note:** A configuration can't be reinstated and after it's deleted assigned profiles can no longer view the configuration.
1. From Setup, click the dropdown next to the selected configuration, and then select **Delete**.
 2. Confirm and then click **Delete**.

USER PERMISSIONS

For admins to create and manage email templates and content in a builder:

- Access drag-and-drop content builder and Customize application

For mobile app users to customize using App Setup menu options:

- Custom applications for Field Service mobile

Learn More About Field Service Mobile Settings

Customize your Field Service Mobile Settings configurations to suit your users' needs.

Field Service Mobile Settings

Setting	Description
Information	
Label	The name of the Field Service Mobile Settings configuration.
Name	The developer name of the Field Service Mobile Settings configuration.
Default	Each user profile can be associated with only one Field Service Mobile Settings configuration. If selected, the configuration is used as the default that's automatically assigned to users.
Branding Colors	See Brand the Field Service Mobile App on page 715.
Additional Settings	
Collect service resource geolocation history	Controls whether geolocation tracking of services resources is enabled.
Collect time zones for time sheet entries	Controls whether time zones of work locations are captured on time sheets.
Display resource absences in Schedule view	Sets whether resource absences are combined with other work in the Schedule page of the app.
Enable full edit on records	Controls whether users can edit records using the Field Service mobile app.
Enable mobile time sheets	Controls whether users can access time sheets on their mobile devices.
Geolocation Accuracy	Controls the accuracy of service resource geolocation tracking. Lowering accuracy reduces battery consumption for mobile devices. The options are: <ul style="list-style-type: none"> • Fine: Accurate to within 10 meters • Medium: Accurate to within 100 meters • Coarse: Accurate to within 1 kilometer
Geolocation Accuracy (Background Mode)	Controls the accuracy of service resource geolocation tracking while the app is running in the background. Lowering accuracy reduces battery consumption for mobile devices. The options are: <ul style="list-style-type: none"> • Medium: Accurate to within 100 meters • Coarse: Accurate to within 1 kilometer

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

Setting	Description
	<ul style="list-style-type: none"> Very Coarse: Accurate to within 3 kilometers
Geolocation Update Frequency in Minutes	Controls the frequency between attempts to retrieve service resource geolocation updates.
Geolocation Update Frequency in Minutes (Background Mode)	Controls the frequency of attempts to retrieve service resource geolocation updates while the app is running in the background. Lowering frequency reduces battery consumption for mobile devices.
Metadata Cache Time in Days	Controls the number of days that org metadata, such as layouts, is kept in the app's local cache.
Picklist Time Interval in Minutes	Controls the spacing of picklist options for time values, such as when creating resource absences.
Record Data Cache Time in Minutes	Controls the number of minutes that record data is kept in the app's local cache.
Schedule Update Frequency Time in Minutes	Controls the number of minutes between attempts to update a user's schedule.
Customization	
Default List View Developer Name	The API name of the default service appointment list view on the schedule screen (optional).
Future Days in the Date Picker	Controls the number of days into the future that a user can select from the date picker on the schedule screen.
Past Days in the Date Picker	Controls the number of days into the past that a user can select from the date picker on the schedule screen.
Send appointment notifications on assignment	If selected, 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.
Send appointment notifications on dispatch	If selected, users are notified when they're dispatched for a service appointment and when their assignment is changed or removed.
Quick Status Change	
Flow Name	The name of an existing flow that the Quick Status Change action is applied to.
App Extensions	See Create App Extensions for the Field Service Mobile App on page 739.

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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

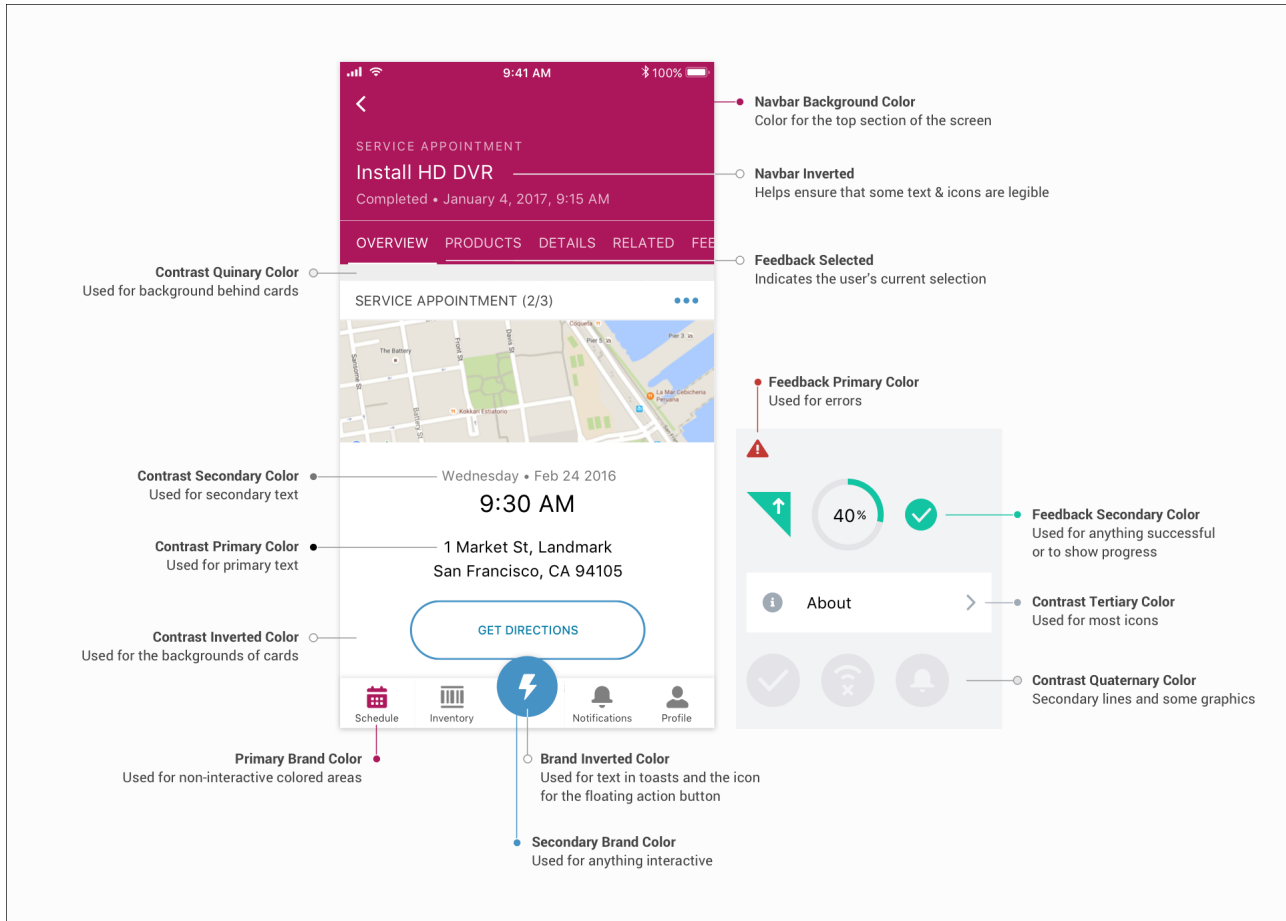
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer Editions**.

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To customize branding colors:

- Customize Application



Token Name	Description	Default Value
Navbar Background Color	The color of the top bar in the app.	#803ABE
Navbar Inverted Color	The secondary color of the top bar in the app.	#FFFFFF
Brand Inverted Color	The color of toasts and the contrast color for the floating action button.	#FFFFFF
Feedback Primary Color	The color of error messages.	#C23934
Feedback Secondary Color	The color of success messages or progress icons.	#13C4A3
Feedback Selected Color	The color indicating the user's current selection.	#FFFFFF
Primary Brand Color	The color of non-interactive areas in the app.	#803ABE
Secondary Brand Color	The color of interactive areas in the app.	#2A7AB0
Contrast Primary Color	The color of primary text.	#000000
Contrast Secondary Color	The color of secondary text.	#444444
Contrast Tertiary Color	The color of the icons on the settings screen and of primary lines that delineate different areas of the UI.	#9FAAB5

Token Name	Description	Default Value
Contrast Quaternary Color	The color of some graphics and of secondary lines that delineate different areas of the UI.	#E6E6EB
Contrast Quinary Color	The color of the background behind cards in the UI.	#EEEEEE
Contrast Inverted Color	The color of card backgrounds in the UI.	#FFFFFF

SEE ALSO:

[Customize the Field Service Mobile App by User Profile](#)

[Add a Profile Tab Background Image in the Field Service Mobile App](#)

[Customize the Field Service Mobile App by User Profile](#)

[Track Service Resource Geolocation with the Field Service Mobile App](#)

[Add a Profile Tab Background Image in the Field Service Mobile App](#)


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.

Screen in the mobile app	Page Layout	Details
Absences	Absences related list on the Service Resource page layout	<p>You can reach the Absences screen from the Profile screen.</p> <p>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.</p>
Inventory	Search results layout on the product item object.	<p>The Inventory tab represents the items in the user's inventory. It shows product items associated with the user's service resource record.</p> <p>Service resources only see the Inventory tab if they're associated with a mobile inventory location (which represents their service vehicle). See Set Up Inventory Access for Mobile Workers.</p>
Products	Product search layout	<p>Users must be able to find products to create product requests and product items.</p> <p>Users viewing products in the app see the <code>Product Name</code> field and the top 3 fields in the search layout.</p> <p> Note: To search Products, a pricebook</p>

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

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

Screen in the mobile app	Page Layout	Details
		<p>must be set on the parent object. Only string fields are searchable. Numbers, Dates and other fields can't be searched.</p>
Products Consumed	Product consumed related list on the work order. Product consumed number must be the first field.	You can reach the Products Consumed screen from the Related tab or the Products tab in the work order carousel.
Record Highlight for any record	Compact Layout of the record (for example, Service Appointment Compact Layout)	A record highlight is a preview of a record. The top-most field in a record's compact layout is displayed prominently.
Record Lookup	Search Layout of the record (for example, Contact Search Layout)	A record lookup is a search for a record. To change the search results, update the search layout in your org.
Related Lists	Related list layout	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.
Schedule	<ul style="list-style-type: none"> The layout selected in the <code>Default List View Developer Name</code> field on the Field Service Mobile Settings assigned to the user's profile. (If no list view is specified) Service Appointment search layout 	<p>The Schedule tab lists service appointments assigned to the user. For details, see Customize the Schedule Tab.</p> <p> Tip: The <code>Default List View Developer Name</code> is the name of the list view that shows when the mobile Service Appointment page is first opened. If the <code>Default List View Developer Name</code> 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 <code>Default List View Developer Name</code> is defined.</p>
Service Appointment	List view layout.	<p>The service appointment screen includes the following fields in the following order:</p> <ul style="list-style-type: none"> First field in the service appointment list view (displayed as a title)

Screen in the mobile app	Page Layout	Details
		<ul style="list-style-type: none"> • Scheduled Start (only visible if the field has a value) • First three fields in the service appointment search layout • Address (only visible if the field has a value) • Scheduled End (only visible if the field has a value)
Work Order Overview	List view layout <ul style="list-style-type: none"> • 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.

[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.

SEE ALSO:

[Customize the Schedule Tab](#)

[Customize the Layout of 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: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To modify search layouts:

- Customize Application

To create custom list views:

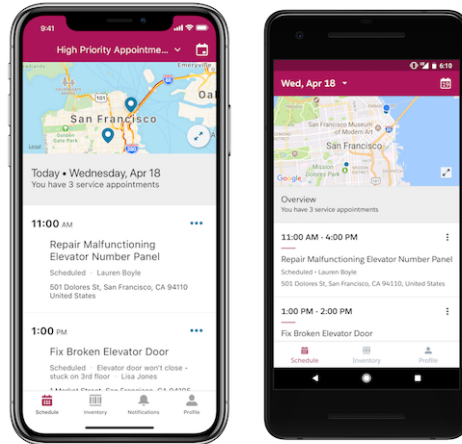
- Read on the type of record included in the list

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, in the Quick Find box, enter *Field Service Mobile*, and then select **Field Service Mobile Settings**.
3. Click the arrow next to the mobile settings you want to define the list view for and select **Show Details**.
4. Under Customization, edit the Default List View Developer Name and 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. Save your changes.

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 see a single Schedule tab of the user's appointments based on your filter criteria, as it would appear on the desktop site.
- Each list view displays a maximum of 1000 service appointments for a 90-day window. For example, if your 90-day window contains 1100 service appointments, only 1000 of those appointments are displayed.
- The app prominently displays the top two fields of the service appointment search layout, so consider which fields your mobile workers want to see on the Schedule tab. Many users, for example, 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
- Service appointments in the schedule list are shown in chronological order. This order can't be changed.

- Lookup fields, like Account, aren't supported and don't appear on the Schedule tab.
- Formulas aren't supported on the Schedule tab.
- 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.
- To add resource absences to the list of Schedule tab items, turn on Display resource absences in the Schedule page on any Field Service mobile settings configuration. Mobile workers get an integrated view of their schedule on calendar-based list views.

SEE ALSO:

[Customize Screens in the Field Service Mobile App](#)

[Customize the Layout of the Work Order Overview Screen](#)

[Field Service Mobile App Considerations](#)

[Customize the Layout of the Work Order Overview Screen](#)

Customize the Layout of the Work Order Overview Screen

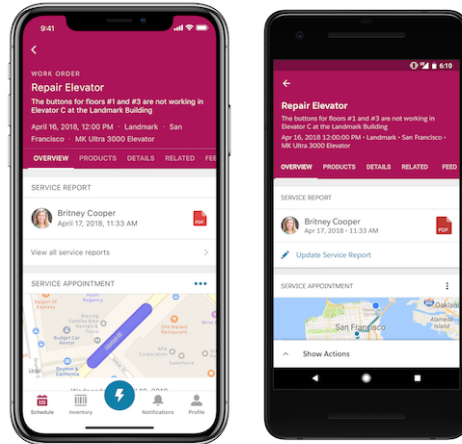
When a user taps a service appointment on the Schedule tab, an overview of the work order is shown. You can customize the highlights and cards shown on the work order overview screen.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.



⚠ 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](#).
- Formula URL fields aren't supported in compact layouts.

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

The Overview tab in the work order carousel displays information about the work order and its child records. The information appears in cards, which represent the related lists on the work order. Manage which cards are displayed by adding or removing related lists on the Work Order page layout in Setup. You can add the following cards to the work order overview.

Card	Description	How to Display and Customize	Available In
Asset Service History	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.	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.	Android and iOS
Knowledge	Shows knowledge articles that are attached to the work order, with a snippet of each article included.	In iOS, the Knowledge card is only visible if an article is attached to the work order.	iOS only
Service Appointment	Shows a map and the option to navigate to the address of the appointment. If the address is not set, the card instead presents the user with the option to set the address, and then activate navigation.	If the work order has one or more service appointments, the Service Appointment card is visible. For information about bundled service appointments, see Manage Bundled Service Appointments on the Field Service Mobile App . The following fields on this card cannot be removed from it: Start Time, End Time, Date, Address, ETA (estimated time of arrival).	Android only
Service Report	Displays service reports associated with the work order's service appointments.	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.	Android and iOS

Card	Description	How to Display and Customize	Available In
		The Service Report card is visible by default in iOS. To make the card visible in Android, manually add it to layout.	
Work Order Line Item	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 .	<p>If the work order has work order line items, the Work Order Line Item card is visible.</p> <p>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.</p> <p>In iOS, this card displays the first two fields from the Work Order Line Items related list.</p>	Android and iOS

SEE ALSO:


- [Customize Screens in the Field Service Mobile App](#)
- [Customize the Schedule Tab](#)
- [Customize the Schedule Tab](#)
- [Set Up Custom Actions in the Field Service Mobile App](#)

Add a Profile Tab Background Image in the Field Service Mobile App

Add a background image to customize the Profile Tab 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: both Salesforce Classic (not available in all orgs) and Lightning Experience

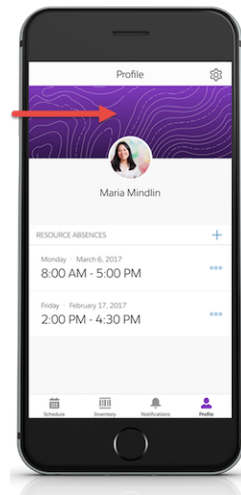
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

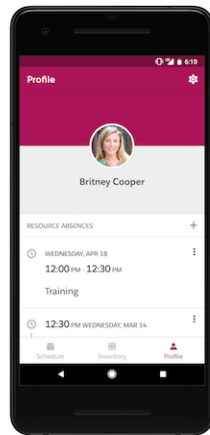
To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To set the company profile image:

- Customize Application





SEE ALSO:

[Brand the Field Service Mobile App](#)

[Brand the Field Service Mobile App](#)

[In-App Profile Settings in the Field Service Mobile App](#)

[In-App Profile Settings in the Field Service Mobile App](#)

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

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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To access the Field Service mobile app, users need the Field Service Mobile user license.


USER PERMISSIONS

To customize push notifications:

- Customize Application


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.


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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To configure resource tracking:

- Customize Application

To assign permission sets:

- Assign Permission Sets

- 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.
 6. Grant mobile workers Read/Write access on their Service Resource (SR) record.
 - a. From the Service Resources tab, select **Sharing (SU Only)** on the Service Resource record.
 - b. Search for the mobile worker whose location you want to track and grant Read/Write access.

To gain insights on the location of mobile workers, you can track the history of the Last Known Location and Last Known Location Date fields of the Service Resources object. See [Field History Tracking](#).

[Exclude Specific Mobile Workers From Location Tracking](#)

Individual mobile users can turn off location tracking for the Field Service mobile app from their phone's operating system settings. To exclude specific mobile workers from tracking, such as when not all members of your workforce are legally protected against geolocation tracking, take these steps.

[Limit Mobile Workers' Location Tracking for Appointment Assistant](#)

Appointment Assistant customers can choose to track the location of mobile workers only in the En Route status, meaning that they're on the way to their next service appointment.

SEE ALSO:

[Customize the Field Service Mobile App by User Profile](#)

[Brand the Field Service Mobile App](#)

[Manage Data Integration Rules for Field Service](#)

[Manage Data Integration Rules for Field Service](#)

[View a Field Service Resource's Daily Travel Route](#)

[Configure Geolocation Settings for Appointment Assistant Real-Time Location](#)

Exclude Specific Mobile Workers From Location Tracking

Individual mobile users can turn off location tracking for the Field Service mobile app from their phone's operating system settings. To exclude specific mobile workers from tracking, such as when not all members of your workforce are legally protected against geolocation tracking, take these steps.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. Create a 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**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To configure resource tracking:

- Customize Application

To assign permission sets:

- Assign Permission Sets

Limit Mobile Workers' Location Tracking for Appointment Assistant

Appointment Assistant customers can choose to track the location of mobile workers only in the En Route status, meaning that they're on the way to their next service appointment.

1. From Setup, in the Quick Find box, enter *Field Service Mobile*, and then select **Field Service Mobile Settings**.
2. Open the required settings.
3. Under Additional Settings, select **Enable Limited Tracking**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To configure resource tracking:

- Customize Application

To assign permission sets:

- Assign Permission Sets

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.

[Which Actions Appear in the Field Service Mobile App](#)

Learn which actions are visible in the Android and iOS app action launcher.

[Add Global Actions to the Field Service Mobile App](#)

Add global actions to the Field Service mobile app to give your agents easy access to common tasks.

[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.

SEE ALSO:

[Customize the Field Service Mobile App by User Profile](#)

[Customize the Layout of the Work Order Overview Screen](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

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:

- 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.
- 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).
- 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.
- After Quick Actions, Edit Work Order, Edit Work Order Line Item, or Edit Service Appointment are displayed.
- 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


To access the Field Service mobile app, users need the Field Service Mobile user license.

Add Global Actions to the Field Service Mobile App

Add global actions to the Field Service mobile app to give your agents easy access to common tasks.

1. From Setup, in the Quick Find box, enter *Publisher Layouts*, and select **Publisher Layouts**.
2. Click **Edit** next to the publisher layout that corresponds to your Field Service mobile app.
3. Drag the quick action you want to add to your app into the Quick Actions in the Salesforce Classic Publisher section.
4. Click **Save**.

The action is accessible from the navigation bar in the Field Service mobile app.

 **Note:** The app only supports global actions of the types **Create a Record** and **Lightning Web Components**. Other action types aren't supported.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To create actions and modify publisher layouts:

- Customize Application

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.



Tip: You can follow these steps for any field service object available in the app.

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.



Note:

- The app supports quick actions of the types **Create a Record**, **Update a Record**, and **Lightning Web Components**. Other action types aren't supported.
- When you modify a page layout, users must log out and log in to the Field Service mobile app to see the changes.

[Set Up Product Requests in the Field Service Mobile App](#)

Let your mobile workers create product requests when they find defective parts in their vehicles or their stock has run out.

SEE ALSO:

[Quick Actions](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To create quick actions and add them to page layouts:

- Customize Application

Set Up Product Requests in the Field Service Mobile App

Let your mobile workers create product requests when they find defective parts in their vehicles or their stock has run out.

1. Create a global quick action for product requests.
 - a. From Setup, enter *Global Actions* in the Quick Find box, and select **Global Actions**.
 - b. Click **New Action**.
 - c. Enter the details for your new action.
 - For Action Type, select **Create a Record**.
 - For Target Object, select **Product Request**.
 - For Standard Label Type, select **Create New [Record Type]**.
 - For Name, enter an API name for your action.
 - d. Click **Save**.
2. Add fields to the action's layout, and click **Save**.
When mobile workers use this action to request inventory, they complete these fields. We recommend using no more than eight fields.
3. Add the Product Request quick action to the Publisher Layout that's assigned to your mobile workers.
 - a. From Setup, enter *Publisher Layouts* in the Quick Find box, and select **Publisher Layouts**.
 - b. Click **Edit** next to the publisher layout you want to add the action to.
 - c. Drag the Product Request quick action to the **Quick Actions in the Salesforce Classic Publisher** list.
 - d. Click **Save**.
4. Create a global quick action for the Product Request Line Item.
 - a. From the Object Manager, select **Product Request**.
 - b. In the sidebar, select **Buttons, Links, and Actions**.
 - c. Click **New Action**.
 - d. Enter the details for your new action.
 - For Action Type, select **Create a Record**.
 - For Target Object, select **Product Request Line Item**.
 - For Standard Label Type, select **Create New [Record Type]**.
 - For Name, enter an API name for your action.
5. Add fields to the action's layout, and click **Save**.
6. Add the quick action to the Product Request page layout.
 - a. From the Object Manager, select **Product Request**.
 - b. In the sidebar, select **Page Layouts**.
 - c. Under Page Layouts, select **Product Request Page Layout**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To create quick actions and add them to page layouts:

- Customize Application

To view product request line items:

- Read on product requests

To create product requests:

- Create on product requests

To create, update, or delete product request line items:

- Edit on product requests

- d. At the top of the screen, select **Quick Actions**.
- e. Drag the Product Request Line Item quick action to the **Quick Actions in the Salesforce Classic Publisher** list.
- f. Click **Save**.

[Set Up Multiple Inventory Locations](#)

By default, all products consumed for a work order or work order line item come from the same location. However, you can let mobile workers log product consumption from multiple locations. You might want to do this when, for example, workers provide services to multiple vendors or want separate inventories for different types of work.

SEE ALSO:

- [Request Inventory in Field Service](#)
- [Product Request and Transfer Fields](#)
- [Set Up Inventory Access for Mobile Workers](#)
- [Request Inventory in Field Service](#)
- [Product Request and Transfer Fields](#)
- [Set Up Inventory Access for Mobile Workers](#)
- [Set Up Multiple Inventory Locations](#)

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**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

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

- Customize Application

- 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.

App Extension Type	Supported in Android	Supported in iOS
Android	Yes	No
iOS	No	Yes
Lightning Apps	Yes	Yes
Web apps	Yes	Yes
Flow	Yes	Yes

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.
3. Under App Extensions, click **Add**.
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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


To access the Field Service mobile app, users need the Field Service Mobile user license.


USER PERMISSIONS

To create and modify App Extensions:


- Customize Application


- **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=...**

5. Click **Save**.


 **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 742.

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
Organization.id
User.displayName
User.email
User.firstName
User.id
User.language*
User.lastName

Supported Global Variables
User.locale*
User.nickName
User.orgId
User.userName


 **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.

One quick and recommended way to accelerate adding flows is by installing the optional, and free, [Field Service Starter Kit](#). The Starter Kit is a Salesforce Labs managed package containing Flow Templates that you can enable and use immediately or customize to tailor fit to your company's specific use case. The kit contains 13 features that you can easily install and test in a sandbox environment and roll out to your users. The features are grouped into three families – Status-Based features, Mobile Notifications, and General Flows.

The Starter Kit is a great way to get started adding flows to Field Service. See the [Field Service Starter Kit Simple Implementation Guide](#) for a good introduction to the features in the kit.

 **Note:** Salesforce Labs solutions like the Salesforce Field Service Starter Kit app aren't official Salesforce products and don't have Salesforce official support. The [Field Service Starter Kit group](#) on the Trailblazer Community is the place to post your questions and get answers.

But, before you begin, learn how to build flows and connect them to the Field Service Mobile app.

[Considerations for Using Flows in the Field Service Mobile App](#)

Review flow considerations before using flows in the Field Service mobile app.

[Build Flows for the Field Service Mobile App](#)

Create, activate, and manage flows for the Field Service mobile app in the drag-and-drop Flow Builder.

[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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run flows from the app:

- Run Flows

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.

Using Flows with Case Assignment Rules

Mobile flows with record updates trigger assignment rules if the request updates an entity that has assignment rules in the same transaction for a case or a lead. To bypass assignment rules, in Apex run `Assignment Rules` with `DMLOptions`, and set the header `Sforce-Auto-Assign` as `False`.

Flow Limitations in the Field Service Mobile App


- Automatic Screen Fields with `fieldType = ObjectProvided` isn't supported on mobile flows.
- Compound fields, for example street addresses, can't be used directly in mobile flows. To access this data, fields such as city and country that comprise the compound field must be used instead.
- Select formula functions and operators are available offline.
- Backslash `\` characters, single quotes (`'`), and multi-line strings aren't supported in flow formula fields.
- CRM Core App screen flows aren't supported in the Field Service mobile app. Only Field Service mobile flows are supported.
- Email alert actions aren't supported in flows.
- Paused flows aren't supported. If you left a flow in progress or 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience


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

To access the Field Service mobile app, users need the Field Service Mobile user license.

- 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 or the `Get` element 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 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.
- In mobile flow filtering, the user sees a related list instead of a picklist if these conditions are met:
 - The flow value store always has a specified parent ID (the parameter with ID passed in), unless the parent ID from the value store is nulled.
 - The user creates a screen step in the flow builder with a single field, and that field uses a single dynamic choice as choice reference. Additionally, the dynamic choice isn't a picklist and contains the parent record ID as a filter.
 - The parent record identified by the parent ID has dynamic choice type configured as a related list.
- Flows can have up to nine conditions in a decision element.
- Record Choice Sets created using the AttachedContentDocuments objects on a Work Order or other supported object 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. Doing so 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.
- Changing the name of or hiding navigation buttons in flows isn't supported in the Field Service mobile app.
- When a mobile flow contains an image, the BeforeInsert trigger in Apex can cause an error.
- To remove access to custom objects, log out and then back into the mobile app.
- Conditional visibility () isn't supported.
- The In and Not In operators in flows aren't supported in the Field Service mobile app.
- Dependent picklists are supported in mobile flows but aren't supported on the desktop site.

Available Formula Functions and Operators

 **Important:** Formula functions are case-sensitive. Make sure to use the formatting listed. For more details, see [Formula and Operator Functions](#)

Formula Functions and Operators	
Math Operators	<ul style="list-style-type: none"> • + (Add) • - (Subtract) • * (Multiply) • / (Divide) • () (Open and Close Parenthesis)

Formula Functions and Operators	
Logical Operators	<ul style="list-style-type: none"> • == (Equal), only == , not = • != (Not Equal), only != , not <> • < (Less Than) • > (Greater Than) • <= (Less or Equal) • >= (Greater or Equal) • && (And), only && , not AND • (Or), only not OR
Date and Time Functions	<ul style="list-style-type: none"> • DAY • MONTH • NOW • WEEKDAY • YEAR
Logical Functions	<ul style="list-style-type: none"> • ISBLANK • ISNUMBER
Math Functions	<ul style="list-style-type: none"> • ABS • CEILING • FLOOR • LN • LOG • SQRT
Text Functions	<ul style="list-style-type: none"> • BEGINS • CONTAINS • FIND • LEFT • LEN • LOWER • RIGHT • SUBSTITUTE • TRIM • UPPER • VALUE
Advanced Functions	<ul style="list-style-type: none"> • REGEX

Build Flows for the Field Service Mobile App

Create, activate, and manage flows for the Field Service mobile app in the drag-and-drop Flow Builder.

Creating flows for the Field Service mobile app uses the same [Flow Builder](#) you know and love. Here are some basic guidelines to follow.

- Save your flows as the **Field Service Mobile Flow** type.
- Include help text on each screen so that users understand what is expected of them.
- Don't ask more than one question per screen, especially if a screen involves picklists.

Some special flows, like image upload flows and signature capture flows, are great additions 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.

[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.

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.

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.

After you [build a flow](#), create an app extension with these settings, which don't affect the rest of your flow. When the mobile app detects the `Service_Report_Flow` name, it launches the Service Report preview interface when your flow is complete.

- 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run flows from the app:

- Run Flows

Because the API name of the service report flow is unique, you can have only one `Service_Report_Flow` at a time.

SEE ALSO:


- [Create Field Service Customer Reports](#)
- [Field Service Guidelines for Creating Service Report Templates](#)
- [Flow Builder Tour](#)
- [Flow Screen: File Upload](#)
- [Trailhead: Customize User Settings](#)
- [Create Service Reports in the Field Service Mobile App](#)
- [Guidelines for Capturing Signatures](#)

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.
3. Under App Extensions, click **Add**.
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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To view, edit, or create a flow in Flow Builder:

- Manage Flow

To run flows from the app:

- Run Flows

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.
9. In Object Manager, search for *Work Order* and select **Page Layouts**.
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.

Set Up Automatic Status Change

Accurate and on-time status changes are a key part of field operations workflow. With Automatic Status Change, mobile workers can focus on their jobs and work more efficiently while the Field Service mobile app tracks status changes for them. For the back office, accurate status changes give better insight into the activity in the field without creating more work for mobile workers.

Automatic Status Change is triggered at three points depending on location and time for today's appointments.

- Starting travel
- Arriving on site
- Completing an appointment

Before you begin:

- Make sure that your mobile workers set the location permission on their device to **Always**.
 - Automatic Status Change only supports the default list view. To show service appointments for one mobile worker in the default list view, in the Owner filter, select **My Service Appointments**.
1. From Setup, in the Quick Find box, enter *Field Service Mobile*, and then select **Field Service Mobile Settings**.
 2. Edit the required settings.
 3. Scroll down to the Automatic Status Change settings.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To customize Automatic Status Change settings:

- Customize Application

4. Select a mode.

Manual	The mobile worker must cancel or confirm the change.
Timed	The mobile worker can cancel or confirm the change. If no action is taken, the status changes when the timer ends.
Automatic	The mobile worker is informed about the change after it happens.

- For Radius in Meters, enter the service appointment radius (100–5,000 meters) that can trigger status changes.
- For Time Limit in Minutes, enter the amount of time (1–60 minutes) before an appointment’s scheduled start time or actual end time that can trigger a status change.
- For Cancellation or Dismissal Timer in Seconds, enter the duration (10–600 seconds) that the timer is visible. After this time, the status changes automatically and can’t be canceled. This setting is only for Timed mode.
- For Traveling Status, enter the status that indicates that a mobile worker is traveling to a service appointment.
- For On-Site Status, enter the status that indicates that a mobile worker is at a service appointment.
- For Completed Status, enter the status that indicates that a mobile worker completed a service appointment.
- Save your changes.

Consider these points when you’re setting up Automatic Status Change.

- If you’re using Automatic Status Change and Appointment Assistant Real-Time Location, it’s recommended to enter a small radius in Radius in Meters. A small radius ensures that Appointment Assistant customers can see the mobile worker’s location up until the worker’s close to the appointment.
- If you’re using mobile flows, Automatic Status Change can cause a conflict with these flows. It’s recommended to run status-related flows on the server.

SEE ALSO:

[Automatic Status Change](#)

[Configure Field Service Settings](#)

[Add Flows to the Field Service Mobile App](#)

Set Up Service Appointment Bundling for Mobile Workers

To give mobile workers access to the bundled service appointments in the Field Service mobile app, you update the service appointment layout and add field permissions for mobile users.

Watch the video to see how grouping short appointments at nearby or same-site locations to create a bundle helps you and your customers.

 [Watch a video](#)

[Add the Related List to the Service Appointment Layout](#)

In new Salesforce orgs, the Bundle Member Service Appointments related list appears in the service appointment's Related tab. In existing orgs, you add the Bundle Member Service Appointments related list and its properties to the service appointment layout.

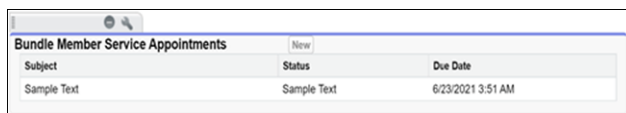
[Add Field Permissions for Mobile Users](#)

Give mobile users read access to fields on the Service Appointment object.

Add the Related List to the Service Appointment Layout

In new Salesforce orgs, the Bundle Member Service Appointments related list appears in the service appointment's Related tab. In existing orgs, you add the Bundle Member Service Appointments related list and its properties to the service appointment layout.

1. From Setup, open the **Object Manager**.
2. Search for and open the **Service Appointment** object.
3. Click **Page Layouts**.
4. Open the relevant layout.
5. Click **Related Lists**.
6. Drag **Bundle Member Service Appointments** into the Related Lists.



Bundle Member Service Appointments		
Subject	Status	Due Date
Sample Text	Sample Text	6/23/2021 3:51 AM

7. To configure the properties of the related list, click .

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS


To customize layouts:


- Customize Application

 **Note:** The Sort By option isn't currently supported. See [Appointment Bundling Limitations](#).

8. Save your changes.
9. To see the Bundle Member Service Appointments list, in a bundle service appointment, open the **Related** tab. The appointments appear in the order determined by the Appointment Bundle Sort Policy, if configured.

Appointment Number	Subject	Status
SA-0002		None
SA-0003		None
SA-0004		None

 **Note:** The expanded view of the related list indicates that the appointments are sorted by due date, even if the order is determined by the Appointment Bundle Sort Policy. See [Appointment Bundling Limitations](#).

 **Important:** Don't use the arrow that changes the order of the appointments according to a specific column. The arrow overrides the order determined in the Appointment Bundle Sort Policy. See [Appointment Bundling Limitations](#).

SEE ALSO:

[Create an Appointment Bundle Sort Policy](#)

Add Field Permissions for Mobile Users

Give mobile users read access to fields on the Service Appointment object.

1. From Setup, in the Quick Find box, enter *users*, and then select **Permission Sets**.
2. Open the permission set used for mobile users.
3. From Apps, click **Object Settings**.
4. Open the **Service Appointments** object.
5. Click **Edit**.
6. Give Read access to the **Bundle**, **Bundle Member**, and **Related Bundle** fields.
7. Save your changes.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To add field permissions:

- Customize Application

Set Up Optimized Image Upload

Mobile workers sometimes must upload multiple images, and they want to do it quickly. You can resize images before uploading to load optimally, especially in areas of low connectivity.

This method is the only one available for resizing mobile images. This capability isn't supported in the Field Service mobile image optimization settings.

1. From Setup, enter *Connected Apps* in the Quick Find box, and then select **Connected Apps**.
2. Open the Salesforce Field Service for Android connected app or the Salesforce Field Service for iOS connected app. To enable optimized image upload for both types of device, follow all the steps for both connected apps.



Note: Settings for optimized images are supported in files uploaded in mobile flows, but aren't applied to images uploaded in the Chatter Feed.

3. Under Custom Attributes, click **New**, and then click **Edit** for the device.
4. For Attribute key, enter *MAX_IMAGE_UPLOAD_SIZE*.
5. For Attribute value, enter the maximum size surrounded by quotation marks, and then click **Save**.

SEE ALSO:

[Known Issue: Image is Rotated](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.


USER PERMISSIONS


To configure an optimized image upload:

- [Customize Application](#)

Set Up Location-Based Actions for the Field Service Mobile App (Pilot)

Automate actions based on the location of your mobile workers. Prompt your mobile workers to complete the actions before or after their service appointments.

 **Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

 **Example:** A gas company wants to keep track of the actual time that their workers spend at each job site. They create two location-based actions: one that's triggered when the mobile worker arrives at a location and another one for when they leave the location. They then create a report that lists the timestamps of the first check-in and the last check-out, taking into account that the mobile worker might have come and gone more than once.

Appointment Number	Service Resource: Name	Assigned Resource ID	Action Name	First Time Invoked	Last Time Invoked
SA-0001	Doron	03rSB0000000A4D	Site Check-In	8/27/2023, 1:02 PM	8/28/2023, 10:48 AM
			Site Check-Out	8/28/2023, 10:00 AM	8/28/2023, 12:00 PM
SA-0002	Jenny	03rSB0000000ANZ	Site Check-In	8/28/2023, 12:30 PM	8/28/2023, 12:30 PM
			Site Check-Out	8/28/2023, 2:30 PM	8/28/2023, 2:30 PM
SA-0006	Sagi	03rSB0000000ACH	Site Check-In	8/27/2023, 1:12 PM	8/27/2023, 1:25 PM
			Site Check-Out	8/27/2023, 1:08 PM	8/27/2023, 2:51 PM
SA-0007	Doron	03rSB00000009Cz	Site Check-In	-	-
			Site Check-Out	-	-
SA-0012	Doron	03rSB0000000A5p	Site Check-In	8/27/2023, 11:50 AM	8/27/2023, 1:01 PM

1. [Create the Location-Based Actions Custom Object](#)

Create a custom object that includes all the settings for your location-based actions. These details build the window that opens when you create a location-based action from the service appointment's related list that you set up later on.

2. [Customize a Quick Action](#)

Create a quick action and add it to the layout.

3. [Set Up the Related List](#)

Add the Location-Based Actions panel to the Service Appointment object's related list.

4. [Create a Location-Based Action for a Service Appointment](#)

Open a service appointment and define a location-based action.

5. [Automate Location-Based Actions with Flows](#)

Create a flow for the location-based actions that your mobile workers can see. Setting up a flow helps you automate the location-based actions so that you don't need to add the actions to individual service appointments.

SEE ALSO:

[Create a Report](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To create and edit custom objects:

- [Customize Application](#)

To edit object permissions:


- [Manage Profiles and Permission Sets](#)

To open, edit, or create a flow in Flow Builder:

- [Manage Flow](#)

Create the Location-Based Actions Custom Object

Create a custom object that includes all the settings for your location-based actions. These details build the window that opens when you create a location-based action from the service appointment's related list that you set up later on.

1. Create a custom object and a custom tab. See [Create a Custom Object in Lightning Experience](#).
 - a. For Label, enter *Location Based Action*. The Object Name *Location_Based_Action* is entered for you.
 -  **Important:** Don't modify this field. Verify that this value hasn't changed before saving the object.
 - b. For Plural Label, enter *Location Based Actions*.
 - c. Under Object Creation Options, select **Launch New Custom Tab Wizard after saving this custom object**.
 - d. Save the custom object. The New Custom Object Tab wizard opens with the Location Based Action object selected for you.
 - e. Go through the steps in the wizard and save your changes.
2. Create the custom fields for the Location Based Action object.
 - a. From the object management settings for the Location Based Actions object, go to Fields & Relationships.
 - b. Click **New**.
 - c. Customize the fields according to [this reference](#) on page 755.
 - d. For each field, select which profiles have access to the field.
 - e. Verify that all of the custom fields are in the Information section of the layout.

[Custom Fields for the Location Based Actions Object](#)

Configure the custom fields of the Location Based Actions custom object.

Custom Fields for the Location Based Actions Object

Configure the custom fields of the Location Based Actions custom object.

Field Label	Type	Description	Field Name	Required	Additional Information
Action Data	Text	For quick actions: Holds the label of the quick action that opens. For view record: Holds the identifier of the record that opens.	Action_Data	No	Length: 80 (recommended) Suggested help text: Enter the label of the quick action that you want to trigger.
Action Type	Picklist	Lets you choose between the QuickAction and ViewRecord action types.	Action_Type	Yes	Select Enter values, with each value separated by a new line , and enter these values. • <i>QuickAction</i>

Field Label	Type	Description	Field Name	Required	Additional Information
					<ul style="list-style-type: none"> • <i>ViewRecord</i>
Description	Text	Lets you add a description for the action.	Description	No	Length: 80 (recommended)
Geofence Trigger Type	Picklist	Lets you choose between the Enter and Exit geofence trigger types.	Geofence_Trigger_Type	Yes	Select Enter values, with each value separated by a new line , and enter these values. <ul style="list-style-type: none"> • <i>Enter</i> • <i>Exit</i>
Initial Time Invoked	Date/Time	Holds the timestamp of the first time the location-based action was triggered.	Initial_Time_Invoked	No	Suggested help text: Don't enter a value. The time is automatically populated the first time that the action is triggered.
Last Time Invoked	Date/Time	Holds the timestamp of the last time the location-based action was triggered.	Last_Time_Invoked	No	Suggested help text: Don't enter a value. The time is automatically populated the last time that the action is triggered.
Radius	Number	Lets you enter the number of meters from a service appointment that triggers the action.	Radius	Yes	Length: 10 Decimal places: 0
Service Appointment	Lookup Relationship	Contains a reference to the service appointment.	ParentRecord (must be changed to this name)	Yes	For Related To, select Service Appointment .

Customize a Quick Action


Create a quick action and add it to the layout.

1. From Object Manager, open the Service Appointment object.
2. Create a quick action.
 - a. From Buttons, Links, and Actions, click **New Action**.

- b. For Action Type, select **Flow**, **Create a Record**, **Update a Record**, or **Lightning Web Component**. The remaining options aren't supported.
 - c. For Target Object, select **Location Based Action**.
 - d. Enter a label and a name.
 - e. Save the action.
 - f. Create additional quick actions as needed.
3. Add the action to the layout.
 - a. From Page Layouts, select the mobile worker's layout.
 - b. Click **Mobile & Lightning Actions**.
 - c. Find the action that you created and drag it into the Salesforce Mobile and Lightning Experience Actions area.
 - d. Save the layout.

Set Up the Related List

Add the Location-Based Actions panel to the Service Appointment object's related list.

1. From the object management settings for service appointments, go to Fields & Relationships.
2. Click **New**.
3. Select **Lookup Relationship** and click **Next**.
4. For Related To, select **Location Based Action** and click **Next**. Field Label is entered for you.
5. Change the Field Label to *Location-Based Actions*.
6. Click **Field Name** to populate the field with the value *Location_Based_Actions*.
 -  **Important:** Don't modify this field. Verify that this value hasn't changed before saving the object.
7. Click **Next** and then complete the rest of the steps.

Create a Location-Based Action for a Service Appointment



Open a service appointment and define a location-based action.


1. From the App Launcher, find and select **Service Appointments**.
2. Open a service appointment and go to the Related tab.
3. In the Location-Based Actions section, click **New**.
4. If you want this location-based action to trigger a quick action:
 - a. For Action Type, select **QuickAction**.
 - b. For Action Data, enter the label of the quick action that you want to trigger.
 - c. Fill in the remaining fields and save your changes.
5. If you want this location-based action to show a record:
 - a. For Action Type, select **ViewRecord**.
 - b. For Action Data, enter the ID of the service appointment that you want to show, or leave this field empty to show the parent record of this location-based action.

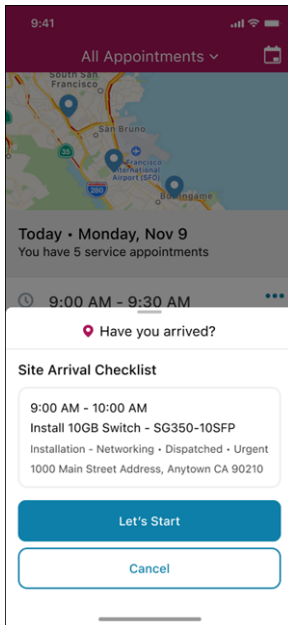
- c. Fill in the remaining fields except for Initial Time Invoked and Last Time Invoked. These fields are automatically populated the first and last times that the action is triggered.
- d. Save your changes.

Automate Location-Based Actions with Flows

Create a flow for the location-based actions that your mobile workers can see. Setting up a flow helps you automate the location-based actions so that you don't need to add the actions to individual service appointments.

1. From Setup, in the Quick Find box, enter *Process Automation*, and then select **Flows**.
2. Click **New Flow**.
3. Select **Record-Triggered Flow** and click **Create**.
4. In the Configure Start window, determine when the flow is triggered.
 - a. In Object, enter *Service Appointment*.
 - b. In Trigger the Flow When, select **A record is created**.
 - c. In Optimize the Flow for, select **Actions and Related Records**.
 - d. Click **Done**.
5. Add a Create Records element.
 - a. To add an element to the flow, hover over , and click .
 - b. Under Data, select **Create Records**.
 - c. Enter a name for the label. API Name is populated based on the label name.
 - d. For How to Set the Record Fields, select **Use separate resources, and literal values**.
 - e. For Object, select the custom object that you created for location-based actions.
 - f. For Action_Data__cc, enter the name of a quick action of type Flow, Lightning Web Component, or Create and Update Record.
 - g. For Action_Type__c, select **QuickAction**.
 - h. For Geofence_Trigger_Type__c, select **Enter** or **Exit**.
 - i. For Radius__c, enter the number of meters from a service appointment that triggers the action.
 - j. For ParentRecord__c, select **{!\$Record.Id}**.
 - k. For Name, enter the name of the quick action.
 - l. For OwnerId, select **{!\$User.Id}**.
 - m. Click **Done**.
6. Save and activate the flow.
7. Verify that the mobile workers have the required permissions to run flows.
 - a. From Setup, in the Quick Find box, enter *users*, and then select **Profiles**.
 - b. Edit the required profile.
 - c. From the General User Permissions section, select **Run Flows**.
 - d. Save your changes.

 **Example:** An electricity company wants its mobile workers to complete a security checklist before they start appointments. They create a flow that makes a suggested action pop up when the mobile worker is 50 meters away from a service appointment. The mobile worker can click **Let's Start** and go directly to the checklist.



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.

[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.

[Add the Field Service Mobile Widget \(Beta\)](#)

You can add the Field Service mobile widget along with the Field Service mobile app on iOS devices.

[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.

[Use Time Sheets in the Field Service Mobile App](#)

View time sheets, log working hours, and submit time sheets for approval on the go.

[Chatter in the Field Service Mobile App](#)

Collaborate on field service jobs using Chatter. Feed tracking must be enabled to display the Feed tab.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

[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.

[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.

[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. Or view work and absences together in the Schedule tab.

[View and Complete Work Plans on the Field Service Mobile App](#)

Front-line workers can use the Field Service mobile app to view and complete work plans. Using the Work Plans tab, they can complete assignments quickly and accurately.

[Automatic Status Change](#)

Receive in-app updates that notify you of automatic status changes.

[Manage Bundled Service Appointments on the Field Service Mobile App](#)

You can view and report your progress on one or more bundled service appointments.

SEE ALSO:

[Field Service Mobile App](#)

[Downloading the Field Service Connected App](#)

[Customize the Field Service Mobile 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.

1. To get the app, search for Field Service in the [Google Play Store](#) or the [iOS App Store](#) on your mobile device.
2. Open the app and log in. If prompted, create a passcode for an added level of security. If your Salesforce admin allows logins only through a company-specific login URL such as mycompany.my.salesforce.com, you must log in with a custom domain. To specify production or sandbox, click the gear icon in the top right of the login screen, 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, and then add a connection with the URL of your site. You can find the URL in Setup under Digital Experiences. If you're on an iOS device, omit https:// when entering the site URL.

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, see [Customize the Apex Login Controller](#).

3. When you open the app for the first time, you receive several device permission requests. Approve the requests to let the app:
 - Send you notifications.


EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

- Access your basic information.
- Always access your location, which is used in the app's mapping functionality and geolocation tracking for scheduling. Always means that your location is tracked when you're using the app and when it's running in the background. If the app isn't running in the background or you're logged out, your location isn't tracked.
- Access your camera.

 **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**).

SEE ALSO:


[Field Service Mobile App Requirements](#)

[Give Users Access to the Field Service Mobile App](#)

[Customize the Apex Login Controller](#)

Add the Field Service Mobile Widget (Beta)

You can add the Field Service mobile widget along with the Field Service mobile app on iOS devices.

 **Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

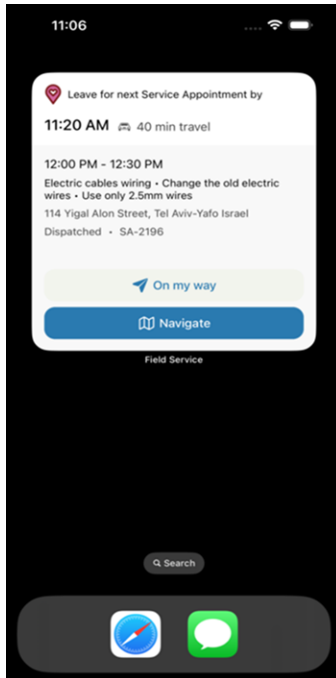
The widget shows the next service appointment on your home screen. You can see the appointment details and check when to head out to the appointment to make sure you're on time. You can also update the appointment's status from Dispatched to En Route and navigate to the location directly from the widget.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.



SEE ALSO:

[Apple Guide: How to add widgets on your iPhone](#)

[Set Up the Field Service Mobile Widget \(Beta\)](#)

[Verify the Widget](#)

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, 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.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

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.

Category	What Gets Primed
Key Objects (Service Appointments, Work Orders, Work Order Line Items, and Assets)	<p>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).</p> <p>All work orders, work order line items, or assets referenced by the primed service appointments are also primed.</p>
Other Objects	<p>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).</p> <p>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.</p>
Special Objects	<p>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.</p> <p>Note that the entire record for Product Items isn't cached.</p>
Related Lists	<p>If a record that is being primed is a Key Object:</p> <ul style="list-style-type: none"> Up to 25 records in the related list are fully primed, meaning their record details, associated quick actions, and other data is all downloaded. 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 varies based on how much data is stored in each one.

Category	What Gets Primed
	<p>This limit doesn't apply to the Articles related list, which has no limit.</p> <p>The related list fields are primed, but the metadata around them isn't primed.</p> <p>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.</p>
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 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. If the app is in the foreground or background when the mobile worker gets a notification, the service appointment is automatically primed. If the app isn't running, the service appointment and any associated records aren't updated and primed until the mobile worker opens the app and taps the notification.

Resolve Priming Errors

Priming errors occur but are relatively simple to solve. For example, a network error that occurs while records are loading stops the priming process. In this case, the user receives an error message prompting them to reconnect the network and try again. Priming can also stop when the server gets too many requests. In this case, the server returns a time when the user can retry their request.

Priming Considerations

Some settings don't necessarily impact priming but can affect data usage. Consider these settings when configuring your org.

Record Data Cache Time


- This setting controls how long cached data is valid.
- After this cache time expires, the app checks for updates on the next synchronization or when the record is accessed. Setting the record data cache time 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

Use Briefcase Builder to create and manage briefcases, which are sets of rules and filters that select records to prime for offline use. Briefcase Builder supports large volumes of records for offline priming, and it supports complex rules for selecting which records to prime. Connect a briefcase with the Field Service mobile app to scale up the data available to your users while offline.

-  **Note:** To use Briefcase Builder and access its full functionality, you must install the Field Service connected apps for both iOS and Android. Without the connected apps, Briefcase Builder doesn't work. Use this link to download the Field Service connected apps.

SEE ALSO:

[Offline Considerations in the Field Service Mobile App](#)

[Field Service Mobile App Considerations](#)

[Briefcase Builder](#)

[Downloading the Field Service Connected App](#)

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

To immediately refresh the flow metadata from the server, tap the **Flow Refresh** button.

To refresh all metadata from the server, tap the **Clear Cache Metadata** button. Note that this action does not touch customer data. (iOS only) To choose your favorite email app to send emails, tap **Profile**. In Email Client, tap to select your preferred app.

SEE ALSO:

- [Add a Profile Tab Background Image in the Field Service Mobile App](#)
- [Add a Profile Tab Background Image in the Field Service Mobile App](#)
- [Field Service Mobile App Considerations](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience


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

To access the Field Service mobile app, users need the Field Service Mobile user license.

Use Time Sheets in the Field Service Mobile App

View time sheets, log working hours, and submit time sheets for approval on the go.

To ensure that mobile workers can access time sheets on their mobile devices, make sure that you follow the setup steps in [Get Started with Field Service Time Sheets](#) on page 338.

1. To access mobile time sheets, tap **Profile**, then tap .
2. View your current time sheets or use the dropdown menu to view past time sheets. To view time sheet details, such as time sheet entries and related lists, tap **View Time Sheet**.
The Current Time Sheets list view shows time sheets that are within the current time period. Once the time period is over, time sheets are moved to the Past Time Sheets list view. For example, if your time period ends on Friday, a new time sheet appears in the Current Time Sheets list view on Monday.
3. To create time sheet entries, navigate to the time sheet overview screen. Then tap **+** next to a date in the time sheet, and enter the time sheet entry details.
4. To submit a time sheet, navigate to a current or past time sheet and tap **Submit**.

 **Note:** If the Salesforce admin hasn't set up an approval process, users don't see the Submit button.

Considerations and limitations for mobile time sheets:

- Only the time sheet owner has access to view, track, modify, or submit a time sheet. To provide that access to a different user, reassign ownership to the new user.
- Salesforce syncs time sheet data to the cache. If mobile users are offline, they can see time sheets that were previously viewed and cached. When they go back online and their device's time sheet data is out of sync with the server's data, they are prompted to review a new version of their time sheet. Users must be online to submit time sheets.
- To access mobile time sheets for the first time, users may need to log out and then log back in to the Field Service mobile app.
- The service resource must own the time sheet record for the time sheet icon to show on the Profile tab.
- After a user submits a time sheet, the status doesn't visually update from Unsubmitted to Pending. To view the updated status, refresh the screen.
- In the mobile app, the submitter can't choose an approver manually.
- To give the best performance and offline experience, users can't update time sheets that are pending or approved. If your workflow allows these changes, you can use a quick action or flow to update the status.

SEE ALSO:

[Create Time Sheet Templates](#)

[Get Started with Field Service Time Sheets](#)

[Create Time Sheet Templates](#)

[Time Sheet Fields](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) 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 time sheets and time sheet entries:

- Read on time sheets

To create, update, or delete time sheet entries:

- Edit on time sheets

To create time sheets:

- Create on time sheets

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**.

These object types are allowed to show the feed tab in the record detail page of the Field Service mobile app: Work Order, Work Order Line Item, Case, Service Appointment, Product, ProductRequest, ProductRequestLineItem, Asset.

 **Note:** admins can disable feed tracking for these objects and the app will respect the setting.

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.

SEE ALSO:

- [Customize Field Service Appointment Chatter Settings](#)
- [Customize Field Service Appointment Chatter Settings](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To customize fields tracked in feeds:

- [Customize Application](#)

To view the field tracking setup page:

- [View Setup and Configuration](#)

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.

A service report is translated in the language selected in the Service Report Language field on the associated work order. If that field is blank, the report uses the default language of the person generating the report. To add languages, in Settings, use Quick Find to search for Translation Language Settings. Click **Edit** next to the desired language, then click **Active**. To add a user as a translator for the language, select them from the available list and click **Add**, then **Save**.

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:

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To create or edit a Service Report Template:

- Customize Application

- 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.
- A service report language pick list shows all supported languages, not only the active ones.
- Although the picklist values aren't translated in service report previews, they're translated into the supported language when the service report is generated.
- The signature image doesn't appear when mobile workers create multiple service reports offline from the same record on the Field Service mobile app.

SEE ALSO:

[Create Field Service Customer Reports](#)

[Create Field Service Report Templates](#)

[Customer Signatures on Service Reports with a Flow](#)

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:

- Ensure you have Salesforce Knowledge set up in your org.
- 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.
- (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.
- Settings for optimized images are supported in files uploaded in mobile flows, but aren't applied to images uploaded in the Chatter Feed.

SEE ALSO:

- [Set Up Knowledge for Work Orders](#)
- [Field Service Mobile App Considerations](#)
- [Salesforce Knowledge](#)
- [Customize Work Order Settings for Field Service](#)
- [Set Up Knowledge for Work Orders](#)
- [Attach Knowledge Articles to Work Orders or Work Types](#)
- [Attach Knowledge Articles to Work Orders or Work Types](#)

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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


To access the Field Service mobile app, users need the Field Service Mobile user license.

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. Or view work and absences together in the Schedule tab.

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 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, you would enter `"Meeting, Training"`.
 4. To control how many resource absences are displayed in the app, set a date range in Field Service Mobile Settings.
 - a. From Setup, in the Quick Find box, enter `Field Service Mobile Settings`, then select **Field Service Mobile Settings**.
 - b. Edit the mobile setting configuration, then choose values for the **Future Days in the Date Picker** and **Past Days in the Date Picker** fields. For example, select 7 days in the past and 30 days in the future so workers can see absences in the prior week and the month ahead.
 5. Optionally, combine resource absences with the work items on the Schedule tab. Mobile workers get an integrated view of the schedule. Desktop users don't see absences added to Service Appointment list views.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

To access the Field Service mobile app, users need the Field Service Mobile user license.

USER PERMISSIONS

To view, create, edit, or delete resource absences:

- Read on service resources

To customize the page layout:

- Customize Application

To customize Field Service mobile settings:

- Customize Application

- a. From Setup, in the Quick Find box, enter *Field Service Mobile Settings*, then select **Field Service Mobile Settings**.
- b. Edit the configuration where you want to add absences to the schedule, and select **Display resource absences in the Schedule page**.
- c. Save your changes.

Managing Absences in the App

View and manage absences from the Absences card on the Profile tab. You see absences for the date range specified in Field Service Mobile Settings.

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

SEE ALSO:

[Create Service Resource Absences for Field Service](#)

[Service Resource Fields for Field Service](#)

[Create Service Resource Absences for Field Service](#)

View and Complete Work Plans on the Field Service Mobile App


Front-line workers can use the Field Service mobile app to view and complete work plans. Using the Work Plans tab, they can complete assignments quickly and accurately.

The Work Plans tab displays all the work plans associated with a work order and its related work order line items.


 **Note:** If a work order doesn't have related work plans, the Work Plans tab is hidden.

1. On the home screen of the Field Service app, tap a service appointment.
2. To view the work plans associated with your work order and all its related work order line items, tap the Work Plans tab. If the tab doesn't show right away, pull down to refresh the work order page.



Work plans associated with a work order are grouped and displayed first on the Work Plans tab. Work plans associated with work order line items are grouped by their parent work order line item and displayed at the bottom of the Work Plans tab. The work order line item ID is displayed in the work plan header.

 **Note:** You can view the work plans and work steps associated with a work order and its work order line items using the work order's Related tab. You can also view work plans related to work order line items from the Work Plans tab on the work order line item's page.

3. Expand a work plan to view its details and its associated work steps.
4. On the work plan, view the progress of the work plan on the progress ring. The progress ring is updated based on the real-time progress of the work plan.
5. To edit or view the details of a work plan, tap the overflow menu of the work plan.
6. On the work step, view the status of a step on the step's status icon. You can also view different fields associated with the step.




 **Note:** If more than one field is displayed for a work step and the text in the first field is long, the second field doesn't display.

7. To view the details page of a work step, tap the name of the step. Here, you can find the description and other information related to the step.
8. To edit the information on the work step detail page, tap the overflow menu of a work step, and select **Edit Work Step**. From the overflow menu, you can also mark a step Not Applicable or Complete.

 **Note:** If you don't have permission to edit a work plan, a lock icon  is displayed for all its associated work steps. The lock icon indicates that you can view these steps but you can't update the status or other fields on the step.

9. To mark a work step's status completed, tap the gray circle next to the work step name, or select **Complete** on the work step's overflow menu.

If the step is a simple instruction such as "Put on your safety gear", we mark the step's status as completed. If the step includes a quick action or a field service mobile flow, selecting **Complete** starts it.

 **Note:** If a step includes a quick action or flow, an action icon  is displayed next to the status icon. The action icon indicates that an action or flow starts after tapping **Complete**. If a step's quick action or flow fails to load, an error icon  is displayed next to the status icon.

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 and update work plans:

- Read and Update permissions on the work plans object

To run flows associated with work steps:

- Run Flows permission or the Flow User field enabled on the user detail page AND View Setup and Configuration

When a flow or quick action is completed, we change the status of the work step to Complete. Completed work steps remain on the work plan record. To let mobile workers manually override work step autocompletion, from Setup, go to Work Plans. Select **Manually update a work steps status when flows are launched**. Work steps default to autocomplete when this setting isn't selected.

-  **Note:** Tapping a completed work step relaunches the quick action or flow associated with that step. Tapping a completed work step with no associated quick action or flow resets the status of that step to New.

10. You can set different statuses to a work step by tapping the overflow menu of the step and selecting **Edit Work Step**.

-  **Note:** To edit a work step, turn on **Enable Full Edit on Records** under Field Service Mobile Settings.

On the Status section of the details page, select the relevant status, and tap **Save**.

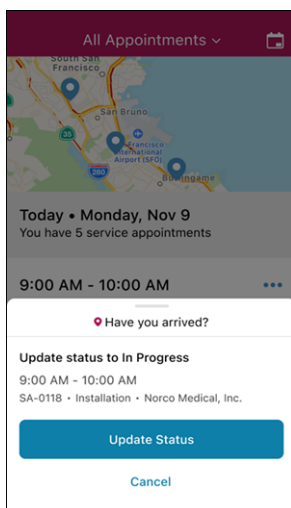
SEE ALSO:

- [Create Field Service Work Plans](#)
- [View and Complete Work Plans](#)
- [Quick Actions](#)
- [Flows](#)

Automatic Status Change

Receive in-app updates that notify you of automatic status changes.

- When you're within the time frame and the area of your appointment, update the appointment's status according to the mode your company uses for status updates.
 - Manual—A prompt appears to suggest a status update. To accept the suggestion, click **Update Status**. To update the status later, click **Cancel**.



- Timed—A prompt appears to suggest a status update, and the progress bar indicates the time that remains before the status is updated. To accept the suggestion, click **Update Status**. To update the status later, click **Cancel**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

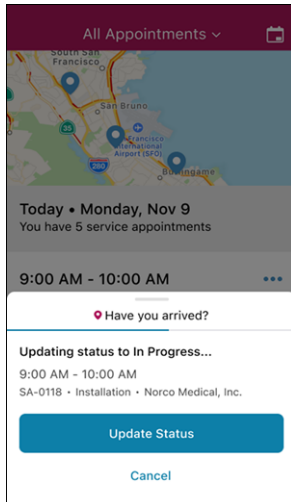
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.

To access the Field Service mobile app, users need the Field Service Mobile user license.

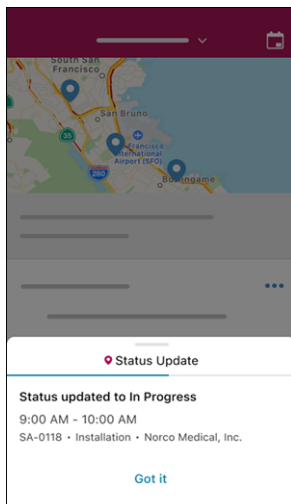
USER PERMISSIONS

To change statuses:

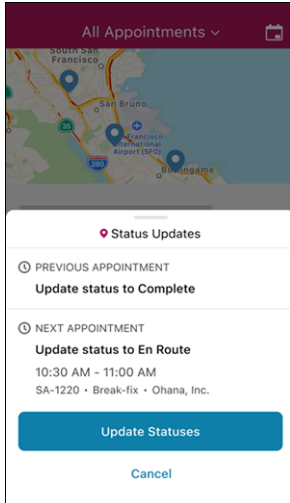
- Field Service Mobile License



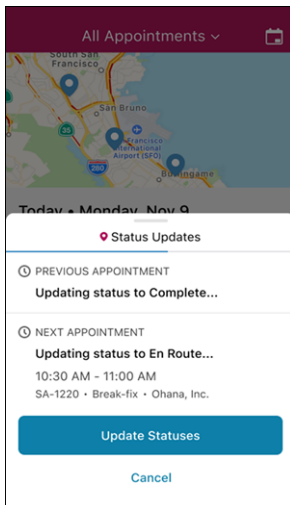
- Automatic—A prompt appears to notify you that the status was updated.



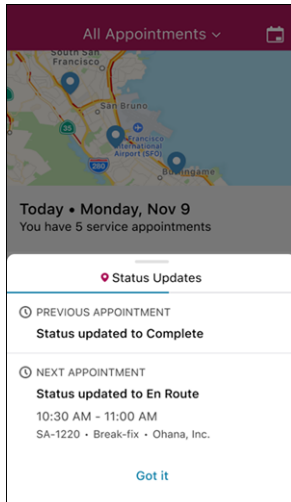
2. When you leave the area of the service appointment, update the appointment's status according to the mode your company uses for status updates.
 - Manual—A prompt appears to suggest status updates for your previous and next appointments. To accept the suggestions, click **Update Statuses**. To update the statuses later, click **Cancel**.



- **Timed**—A prompt appears to suggest status updates for your previous and next appointments. The progress bar indicates the time that remains before the statuses are updated. To accept the suggestions, click **Update Statuses**. To update the statuses later, click **Cancel**.



- **Automatic**—A prompt appears to notify you that the statuses of your previous and next appointments were updated.



3. Your service appointment statuses are updated until you finish work for the day.

Consider these points when you're using Automatic Status Change.

- If you're on your way to your next service appointment outside of the time frame, you're prompted to update your status manually.
- If you're offline when you update a status, the change is synced when you're back online.
- The prompts appear only if the app is open. When the app is closed, the updates appear as notifications.

SEE ALSO:

[Set Up Automatic Status Change](#)

[Set Up Automatic Status Change](#)


Manage Bundled Service Appointments on the Field Service Mobile App

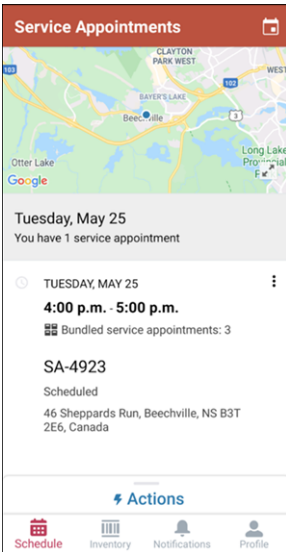
You can view and report your progress on one or more bundled service appointments.

Watch the video to see how grouping short appointments at nearby or same-site locations to create a bundle helps you and your customers.

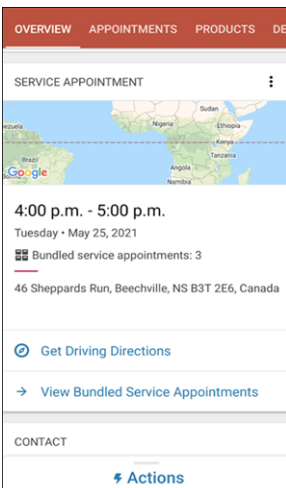
 [Watch a video](#)

1. In the Field Service mobile app, tap **Schedule**.

Bundles have the bundle icon  .



2. Tap a bundle.



3. Tap **View Bundled Service Appointments**, or open the **APPOINTMENTS** tab.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

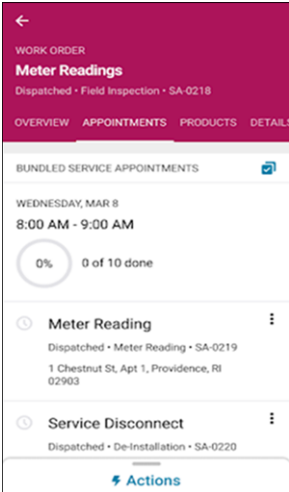
The Field Service core features, managed package, and mobile app are available in **Enterprise**, **Unlimited**, and **Developer** Editions.


To access the Field Service mobile app, users need the Field Service Mobile user license.


USER PERMISSIONS

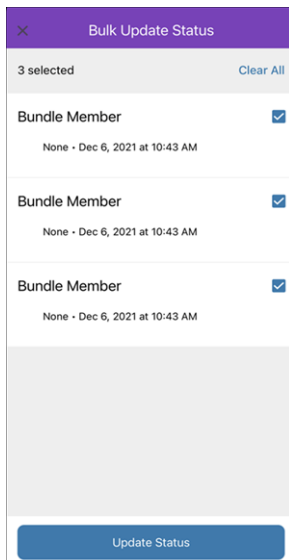
To manage bundles in the Field Service mobile app:

- Field Service Mobile License
- Field Service Recourse Permissions



 **Note:** The fields shown for each bundled service appointment are based on the fields selected in the Bundle Member Service Appointments related list search layout on the Service Appointment object.

4. Edit a single bundled service appointment to update the status, or update multiple appointments together.
 - a. Tap .
 - b. Select the bundled service appointments, and tap **Update Status**.



- c. Select the new status, and tap **Save**.

