

Salesforce Field Service Basics



SPEAKER

Ali Zakir

Service Cloud/FSL Specialist
AblyPro



Agenda

SALESFORCE FIELD SERVICE

- What is Salesforce Field Service Management
- Key Users
- Work Order Flow
- Dispatcher Console
- Mobile Application
- Data Model
- Core Objects
- Field Service – a Real-Time Demo



What is Field Service



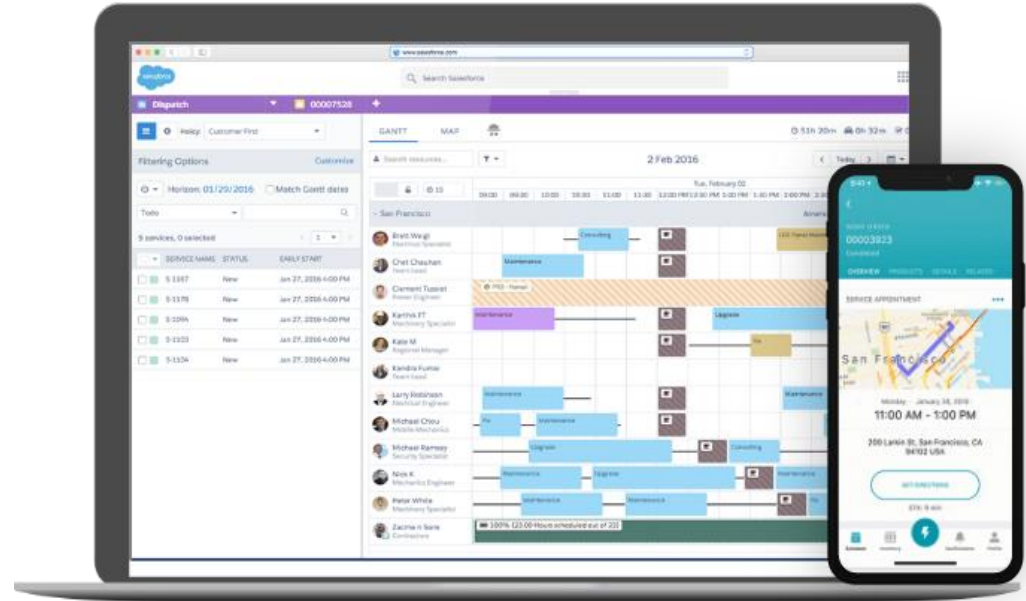
360 Connected Field Operation's
Agents, Dispatchers and Field technicians
work seamlessly together



Intelligent Scheduling
Service appointments to the right
technician with the right skills



Field Service App
Field technicians have visibility to accounts
and service appointments



Key Users



ADMIN

Configure Salesforce
and Field Service



SERVICE AGENT

Complete view of
customer accounts
and create work
orders.



DISPATCHER

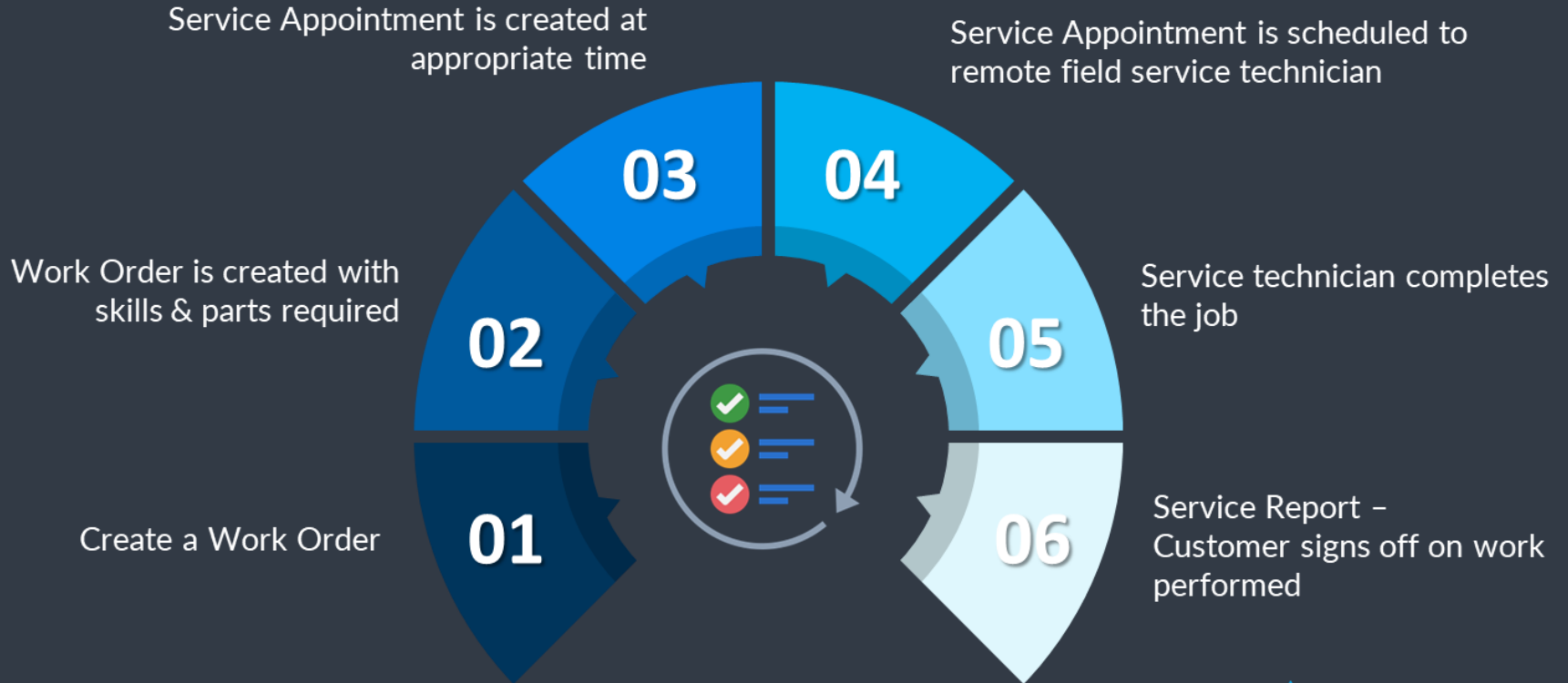
Real-time insight to
day-to-day field
operations. Schedule
service appointments
and technicians



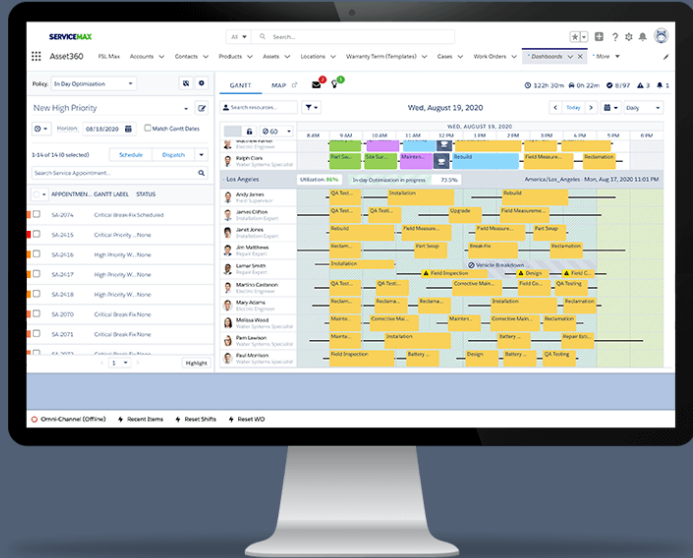
FIELD TECHNICIAN

Perform onsite
service quickly on
time and with access
to customer
information

Work Order Flow

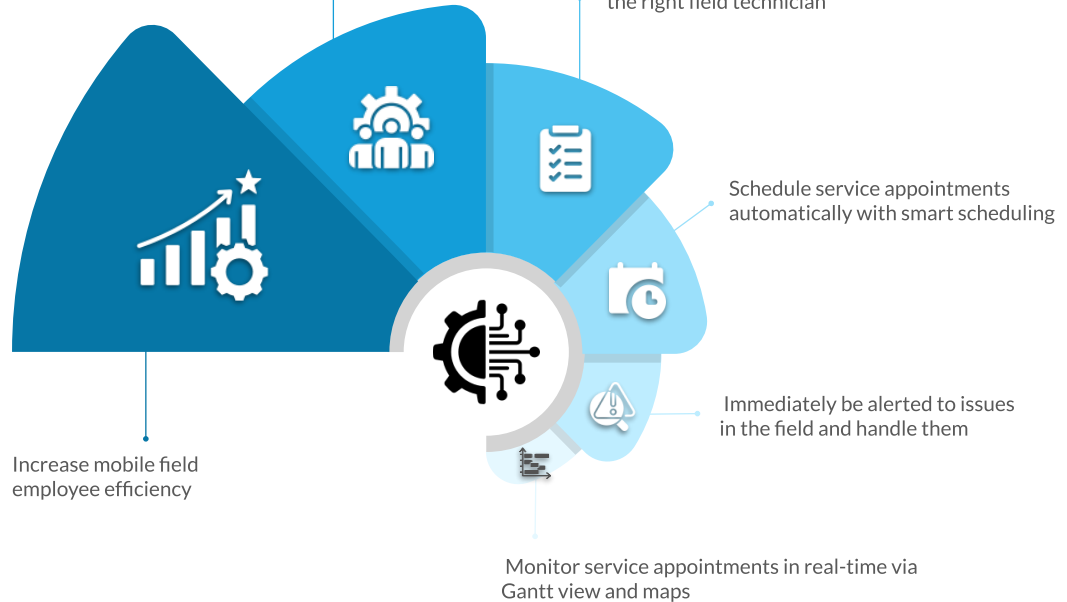


Dispatcher Console



Seamlessly manage and monitor service field technicians

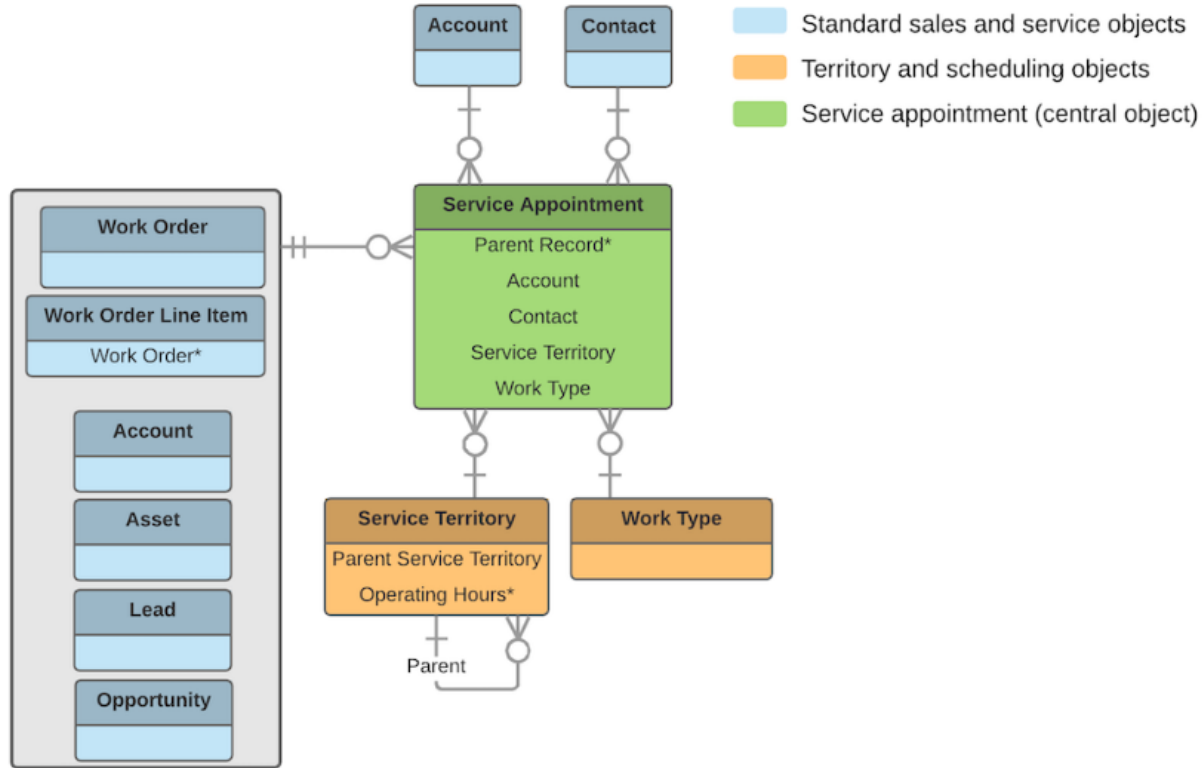
Ensure the right job is assigned to the right field technician



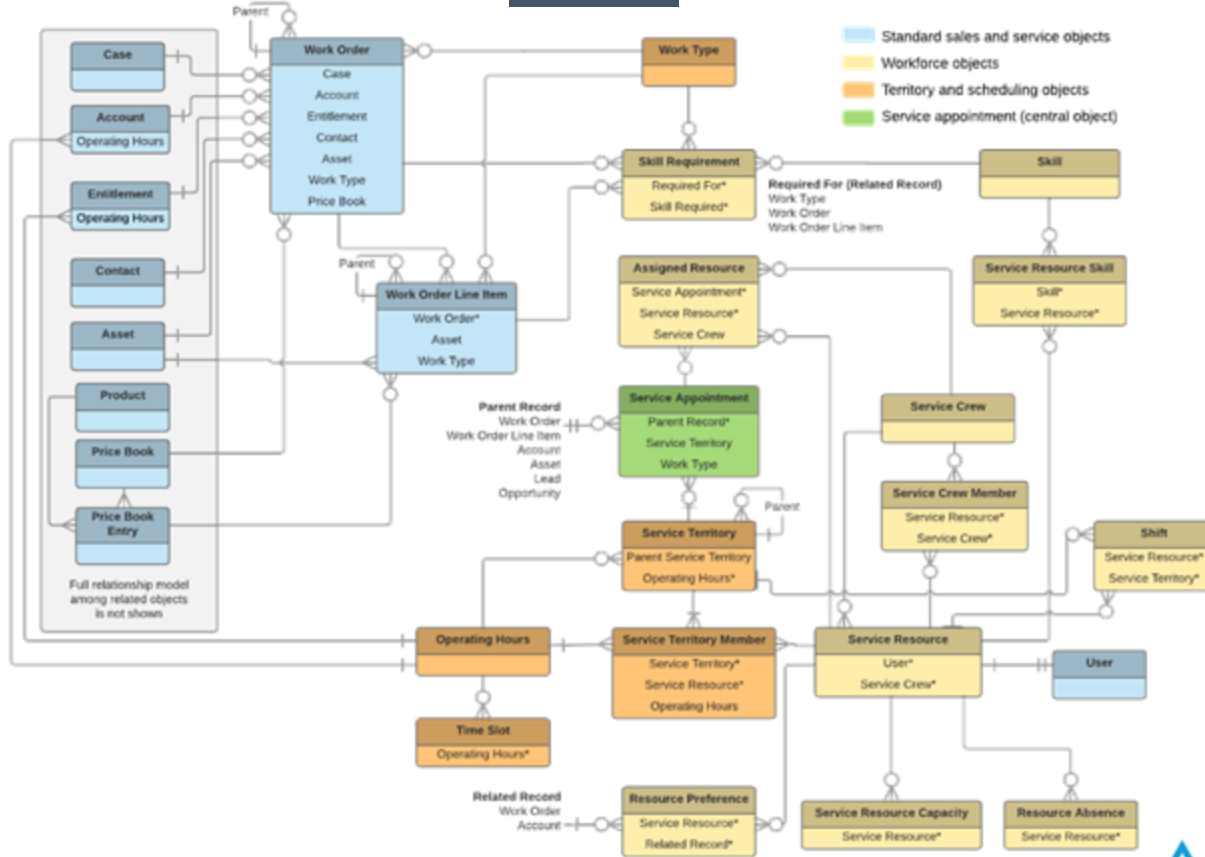
Technician – Field Service Mobile App



Field Service - Data Model



Field Service - Data Model



Core Objects

WORK ORDER

A collection of information for repairs, maintenance activities, and other service requests that require an onsite visit.

WORK TYPE

Templates for Work Order creation and define key parameters - appointment duration, skills and products required etc.

SERVICE TERRITORIES

Define regions in which field service work can be performed. Field Technicians and Dispatchers are defined within territories.

SKILLS

Specific skills are defined for each field resource. These skills are used to match the correct resource to the right job.

SERVICE APPOINTMENT

Represent field service visit to a customer site, providing scheduling and assignment details.

SERVICE RESOURCE

Mobile workers that are assigned to service appointments.

OPERATING HOURS

Assigned to territories, service territory members, and accounts to indicate when available for field service work.

Technician – Field Service Mobile App

Increase the efficiency and productivity of your remote field technicians with a dedicated field service mobile application. Manage service appointments, create and update records with offline first capability. Keep technician in know with push notification.



Field Service

Real-Time Demo



Contact Us

Salesforce Service Cloud & Field Service Success Consultant



Address

AblyPro
12410 Milestone Center Drive
Suite 600
Germantown, MD 20876

Phone & Email

240-259-3076
wecare@ablypro.com

Social Media

[Facebook.com/ablypro](https://www.facebook.com/ablypro)
[Twitter.com/ablypro](https://twitter.com/ablypro)
[Linkedin.com/company/ablypro](https://www.linkedin.com/company/ablypro)