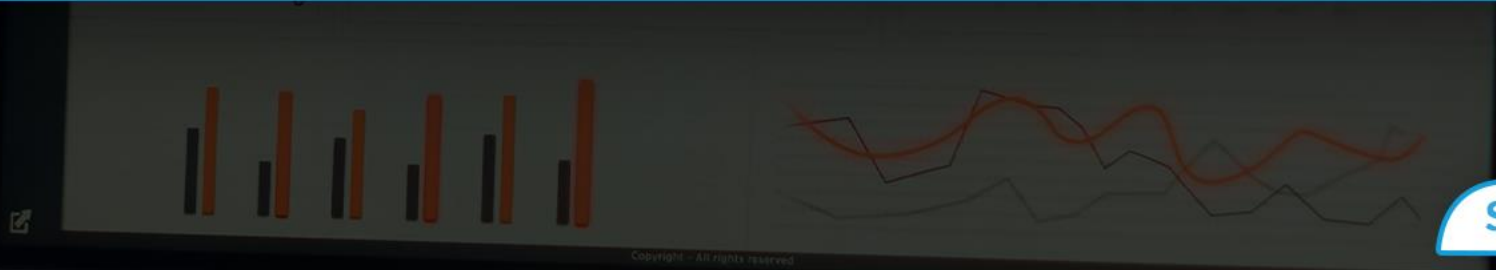




3 Easy-to-Use Salesforce Field Service Dashboards



SPEAKER

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3 EASY-TO-USE SALESFORCE

Field Service **Dashboards**

- Why Field Service Reports and Dashboards
- Importance of Reports and Dashboards
- 3 Field Service Dashboards to Optimize Service Operations



Agenda

Why Field Service Reports & Dashboards



360° View of Operations

Get a complete view of your service operations, allowing you to monitor technician activities, work order status, and resource allocation in real-time.



Technician Performance Analysis

Helps you analyze KPIs like first-time fix rate to identify trends, areas for improvement, and opportunities for operational excellence.



Data Visualization

Easily understand processed data in the form of graphs, charts, maps, or other visual representations as per your requirements.



Importance of Reports & Dashboards

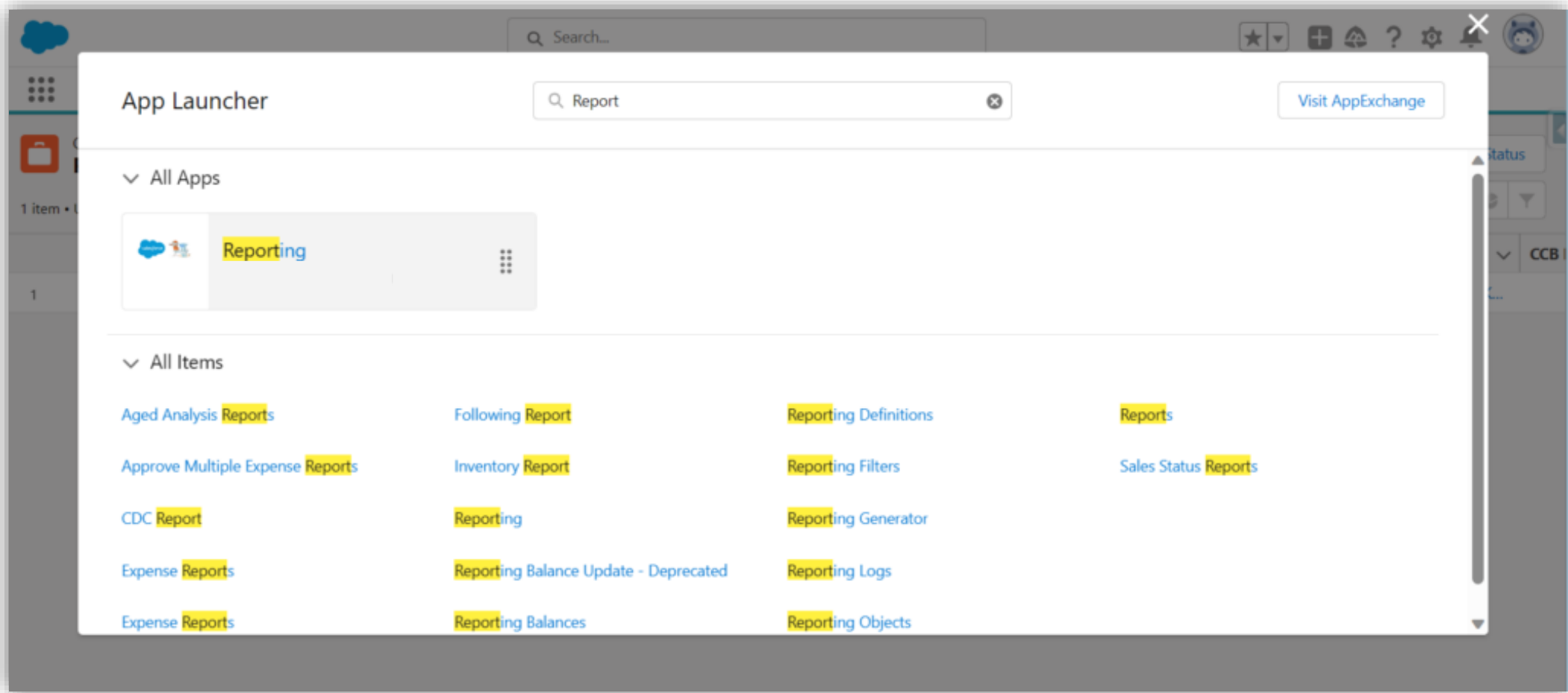


How to Create a Report in Field Service

Explained in 4 Easy Steps



Step #1: Create a New Report from App Launcher



Step #2: Choose Your Report Type

Create Report

Category

- Recently Used
- All**
- Accounts & Contacts
- Opportunities
- Forecasts
- Customer Support Reports
- Leads

Select a Report Type

Search: Case [x] Filter (0)

Report Type Name	Category
Opportunities with Order and Case Number	Custom
Cases	Standard
Cases and Work	Standard
Cases and Component	Standard
Cases and Sub Location	Standard
Cases and Component	Standard

Details

Cases
Standard Report Type

Start Report [v]

Details Fields

Created By You

Step #3: Filter Your Data & Select Columns/Fields

REPORT ▾
New Cases Report ✎ **Cases**

⏪ ⏩ Add Chart Save & Run Save ▾ Close Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Fields > **Outline** **Filters** 1

Groups
GROUP ROWS
Add group... 🔍

Columns ▾
Add column... 🔍
Case Owner ×
Account Name ×
Subject ×
Date/Time Opened ×
Age ×
Estimated Completion Date ×

	Case Owner	Account Name	Subject	Date/Time Opened	Age	Estimated Completion Date
1	Test Technician4	test customer	Test	4/13/2023 12:46 PM	2,181	-
2	Mohammed Gaus Khot	The TJX Companies Inc	Test	4/6/2023 8:29 AM	2,350	4/5/2023
3	Manish Kumar	Testing Insight Hilton	-	4/13/2023 2:38 AM	2,188	-
4	Shikhar Tyagi	Testing Insight Hilton	Account-	3/20/2023 12:35 PM	2,754	-
5	Hilton	Testing Insight Hilton	hilton	3/20/2023 1:14 PM	2,757	-
6	Yogita Baghel	-	testerty	4/3/2023 10:29 AM	2,423	-
7	Retail IN Test	Testing Insight Hilton	Test	3/24/2023 4:13 AM	2,670	-
8	Mohammed Gaus Khot	Testing Insight Hilton	Test	3/9/2023 10:37 AM	3,023	-
9	Santosh Yadav	Tesco	Address pulled in subject	3/10/2023 10:42 AM	2,996	-
10	Manish Kumar	Testing Insight Hilton	-	4/13/2023 1:48 AM	2,189	-
11	L1-TMS	Testing Insight Hilton	comm	3/20/2023 1:34 PM	2,756	-

Currency: USD ▾

Omni-Channel (Offline) » Macros ☰ Recent Items ⌚ History 📌 Useful Links

Step #4: Save & Run Your Report

REPORT ▾
New Cases Report Cases

⏪ ⏩ Add Chart Save & Run Save ▾ Close Run

✓ Previewing a limited number of records. Run the report to see everything. Update Preview Automatically ✓

Save Report

* Report Name
New Cases Report

Report Unique Name ⓘ
New_Cases_Report_Aiv

Report Description

Folder
Public Reports [Select Folder](#)

Cancel Save

Mohammed Gaus Khot	test customer	Test	4/11/2023 11:58 AM	2,230
Manish Kumar	Testing Insight Hilton	-	4/13/2023 2:45 AM	2,188
Hilton	-	Test	3/16/2023 9:18 AM	0 ▾

Row Counts Detail Rows Subtotals Grand Total Currency: USD ▾

Omni-Channel (Offline) » Macros Recent Items History Useful Links

Sample Report

Service Home Chatter Work Orders Service Appointments Service Resources Locations Buildings Waste Bins Route Restrictions

Work Order Line Item **00000001** [+ Follow](#) [Edit](#) [Create Service Report](#)

Work Order	Status	Start Date	End Date	Asset	Work Type
00000025	New				

Feed **Related**

Service Reports (1)

Service Report Name	Created By	Created Date
00000001_V1	pford	19/11/2020 17:21

[View All](#)

Details

Information

Work Order Line Item Number	00000001	Work Order	00000025
Status	New	Order	
Parent Work Order			

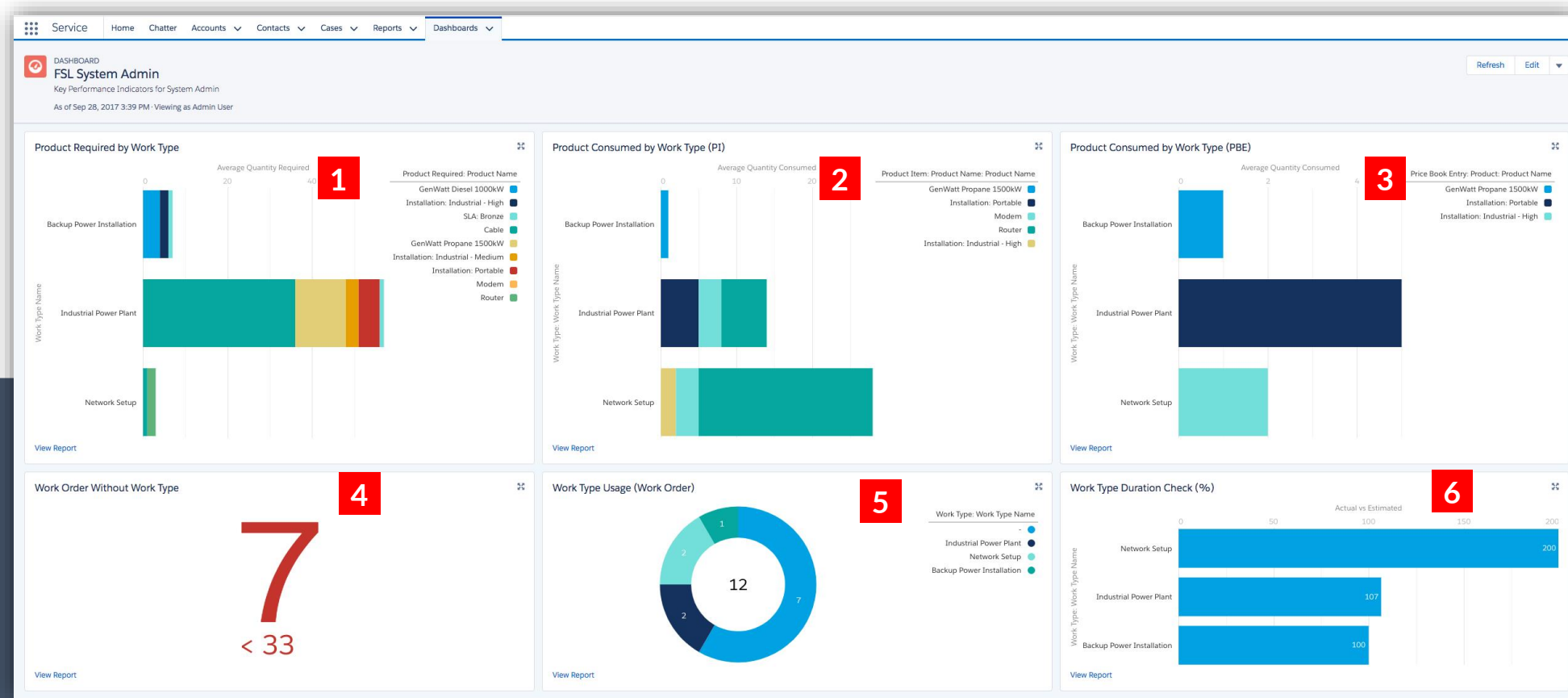
3 Field Service Dashboards to Optimize Service Operations



#1: System Administrator Dashboard

PURPOSE OF DASHBOARD

- ✓ Monitor the overall field service processes
- ✓ Identify areas of improvement
- ✓ Track the performance of field technicians



1. Product Required By Work Type
Helps admins in understanding product-work type connections.

2. Product Consumed By Work Type (PI)
Focuses on products used, mainly installed ones, monitoring utilization and inventory.

3. Product Consumed By Work Type (PBE)
Tracking product consumption, mainly consumed items.

4. Work Order Without Work Type
Identify & track work orders that are not categorized with a specific work type.

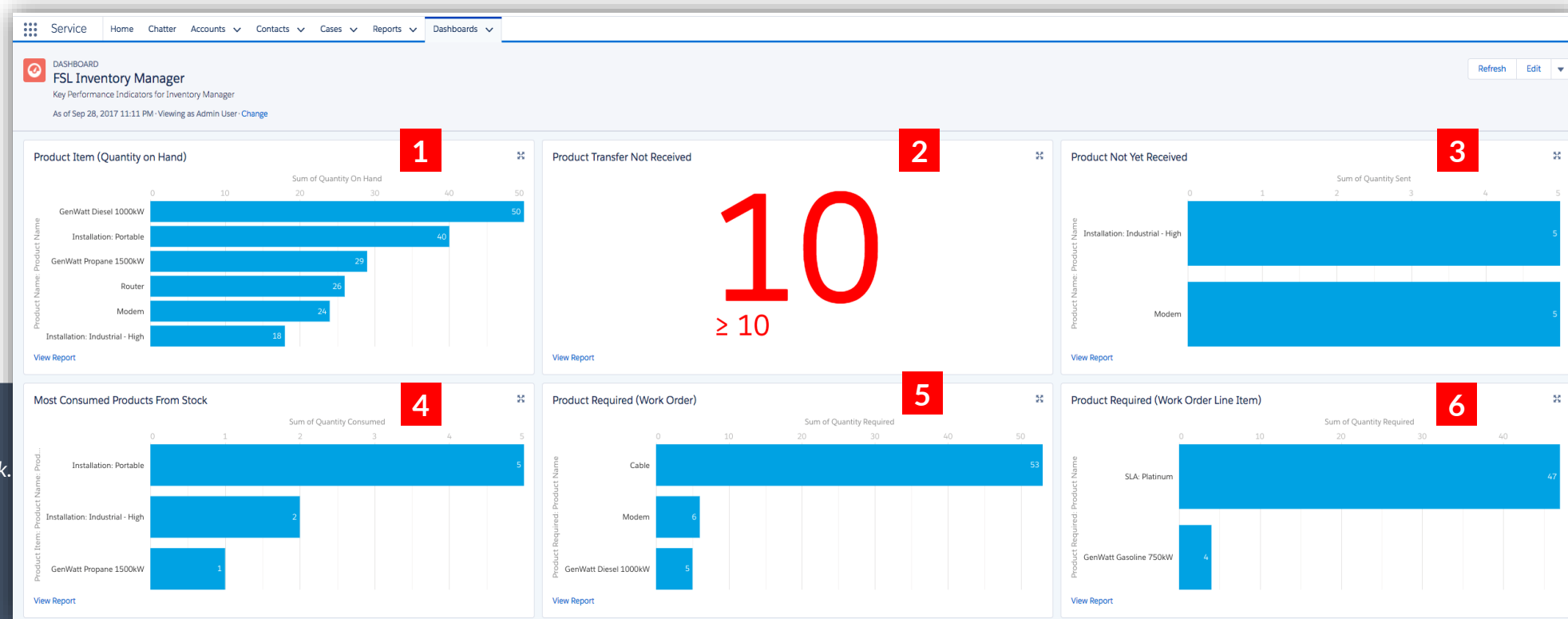
5. Work Type Usage (Work Order)
Analyzes work type distribution and effectiveness.

6. Work Type Duration Check (%)
Evaluates work type efficiency within work orders.

#2: Inventory Manager Dashboard

PURPOSE OF DASHBOARD

- ✓ Get instant visibility into inventory levels
- ✓ Ensure field technicians are equipped with the right tools
- ✓ Facilitates data-driven inventory management



1. Product Item (Quantity on Hand)
Shows current quantity of product items in stock.

2. Product Transfer Not Received
Identifies product transfers that haven't been received.

3. Product Not Yet Received
Lists products yet to be received.

4. Most Consumed Products from Stock
Identifies the most frequently used products from stock.

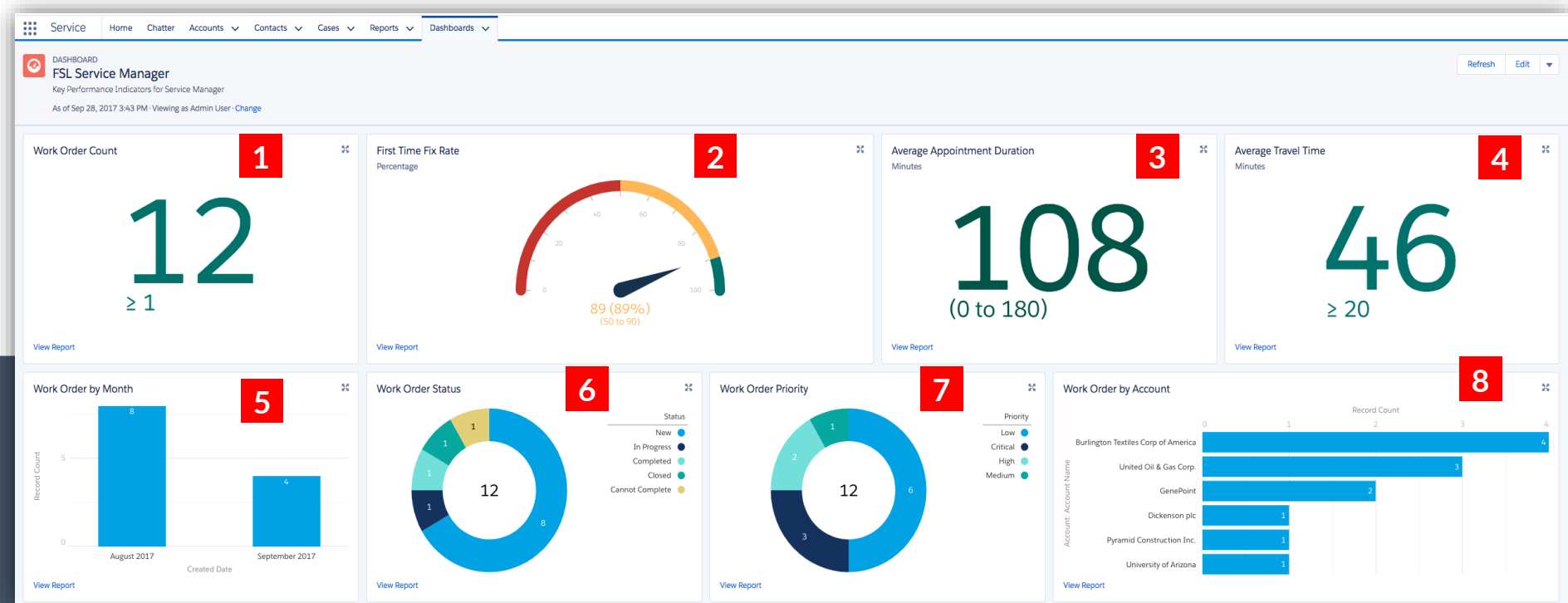
5. Product Required (Work Order)
Monitors products required for work orders.

6. Product Required (Work Order Line Item)
Tracks products needed for specific work order line items.

#3: Service Manager Dashboard

PURPOSE OF DASHBOARD

- ✓ Empowers managers to make informed decisions.
- ✓ Allows service managers to monitor field service teams.
- ✓ Recognize high-performing technicians.



1. Work Order Count

Tracks the total number of work orders, providing an overview of service volume.

2. First Time Fix Rate

Measures the % of work orders resolved on the first visit, indicating service efficiency.

3. Average Appointment Duration

Displays average time taken for appointments.

4. Average Travel Time

Displays the average travel time for field technicians.

5. Work Order By Month

Provides monthly breakdown of work orders.

6. Work Order Status

Provides insights into the current status of work orders.

7. Work Order Priority

Shows the priority of work orders.

8. Work Order by Account

Displays work orders by customer accounts.

Contact Us

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