

Implement Salesforce Field Service



OVERVIEW

In this expert-led class, you'll learn what's needed prior to setting up Salesforce Field Service, as well as the steps it takes to successfully implement it for your organization. Plus, you'll get hands on with an implementation. Discover how Salesforce Field Service can help your organization resolve field service calls faster and boost employee productivity in the field.

WHO SHOULD TAKE THIS COURSE?

This course is recommended for Implementation Consultants and Salesforce Administrators either working with, or for, organizations deploying Field Service Lightning. You should have a solid understanding of Salesforce Administrator functionality and concepts prior to attending this course.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Walk through the process of setting up Field Service Lightning.
- Explain Field Service Lightning and its components, capabilities, and data models.
- Know the right questions to ask prior to implementing Field Service Lightning.
- Utilize the Dispatcher Console.
- Understand how field technicians manage service appointments using the Field Service Lightning mobile app.



DURATION

- 3 days

DELIVERY FORMAT

- Classroom

AUDIENCE

Experienced Salesforce Administrators



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MODULES & TOPICS

Module 1: Course Orientation

- Course Introduction
- Certification Overview
- Field Service Definitions and Video

Module 2: AW Computing Overview

- Explain the Business Reason Why AW Computing Has Purchased FSL
- Describe the Framework for a FSL Project Team
- Reference Your Action Items for the Course

Module 3: FSL Overview

- Identify Field Service Management Challenges and Determine How FSL Can Overcome Those Challenges and Meet KPIs
- Describe What Connected Field Service Looks Like
- Complete Prerequisite Exercises
- Explain the Main Components, Capabilities, and the Data Model of FSL

Module 4: FSL Initial Configuration

- Identify the Features Within the Field Service Settings Tab
- Identify the Permission Sets We Assign to Each License, the Profiles and Permission Sets We Assign to Our Users, and Why We Do This
- Describe Geocoding and Data Integration Rules Within FSL
- Complete Prerequisite Exercises

Module 5: Plan for FSL

- Ask the Essential Questions Before Setting up FSL

Module 6: FSL Main Elements

- Set Up All FSL Main Elements
- Define Operating Hours
- Explain Service Territories
- Recognize the Importance of Required Skills
- Discuss How Work Orders Behave and Interact with Other Objects
- Explain the Service Resources Data Flow
- Describe the Field Service Location and Product Data Flow

Module 7: FSL Scheduling and Policies

- Complete All Exercises Related to FSL Scheduling and Policies
- Identify Work Rules and Service Objectives
- Identify Scheduling Policies Included in FSL
- Define the Difference Between the Service Appointment and Work Order

Module 8: FSL Contractors

- Complete All Exercises Related to Contractors
- Explain Capacity with Contractors and How to Give Contractors First Preference
- Describe the Service Appointment Lifecycle and Related Status Transitions

Module 9: Dispatcher Console

- Complete All Exercises Related to the Dispatcher Console
- Explore the Capabilities of the Dispatcher Console
- Book and Manage Service Appointments
- Track and Monitor Service Resources
- Describe the Schedule Optimization Model

Module 10: Mobile with Field Technicians

- Explain the Business Flow of a Case to Work Order to Service Appointment
- Identify the Key Tasks Performed by Each Field Service Role (Customer, Agent, Dispatcher, Field Tech, and Admin)
- Describe How Field Technicians Manage Their Service Appointments Using the FSL Mobile App
- Complete Reporting and Mobile Exercises

Module 11: Review and Resources

- Test Your Knowledge with FSL Review Questions
- Access FSL Resources



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