



Material Transport App

User Guide



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Material Transport Overview

Material Transport: Salesforce native solution for visibility of your field operations.

In many industries, the material transport process is a critical part of ensuring efficient operations. Diabsolut has designed a material transport solution for any industry with capabilities and benefits for the operator, vendor, and driver. This digital tool can be utilized to streamline the material transport process, resulting in cost reduction, empowered field teams, and real-time visibility into work status and completion.

Overview of User Capabilities

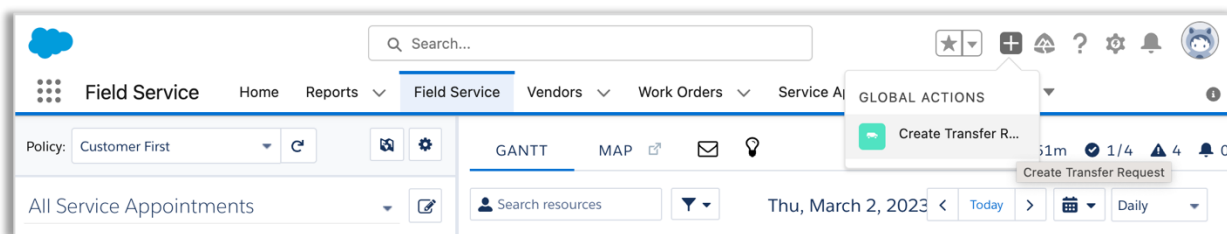
User	Roles and Capabilities
Operator	- Owns the Salesforce org. and may have administrative capabilities, but is not System Admin. - Is responsible for the Salesforce org and day-to-day operations. - Creates Locations, Work Types, and Recurring Work Order Configurations. - Has full visibility of all Vendors and transfer requests (Work Orders). - Has access to Create Transfer Request action to create transfer requests (Work Orders). - Monitors transfer requests after Vendor-Dispatch and Drivers complete work.
Vendor-Dispatcher	- Has controlled access to the Salesforce org. - Has access to the Field Service Console (Gantt) - Responsible for scheduling and dispatching Service Appointments to Driver resources.
Driver	- Has controlled access to the Salesforce org. through the Field Service Mobile App on a mobile device only. - Sees the Service Appointments that have been dispatched to them. - Uses the Field Service Mobile App to update work status and enter transfer information.

Creating a Material Transfer Request and Work Order Completion

Operator: Submits a Material Transfer Request to Vendor

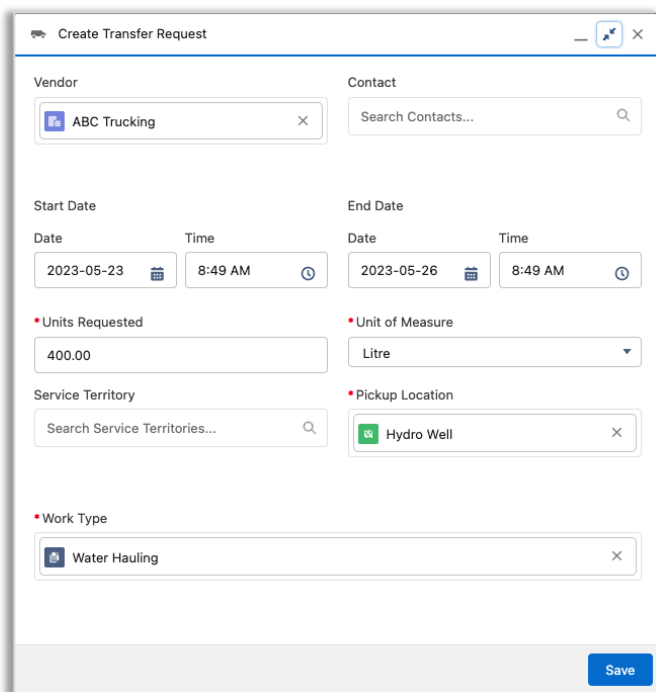
The Operator user is from the organization producing the material. They are responsible for the pickup location, work type, and material. They initiate the material transfer request to a selected Vendor using the Create Transfer Request global action.

1. Click the Global Actions icon and then select **Create Transfer Request**.



2. From the Create Transfer Request layout, enter your transfer request information:

- Select a **Vendor** and optionally a **Contact**.
- Select a **Start Date** and **End Date**.
Note: The End Date defaults to three days after Start Date.
- Enter **Units Requested** and **Unit of Measure**.
- Select a **Service Territory** (optional) and **Pickup Location**.
- Select a **Work Type**.



The screenshot shows the 'Create Transfer Request' form. The fields are as follows:

- Vendor:** ABC Trucking
- Contact:** Search Contacts...
- Start Date:** Date: 2023-05-23, Time: 8:49 AM
- End Date:** Date: 2023-05-26, Time: 8:49 AM
- Units Requested:** 400.00
- Unit of Measure:** Litre
- Service Territory:** Search Service Territories...
- Pickup Location:** Hydro Well
- Work Type:** Water Hauling

A 'Save' button is located at the bottom right of the form.

3. Click **Save**.
Once the Operator enters the details and saves, a Work Order is created for the selected Vendor. The Vendor will receive a notification in Salesforce and can then act on the Work Order.

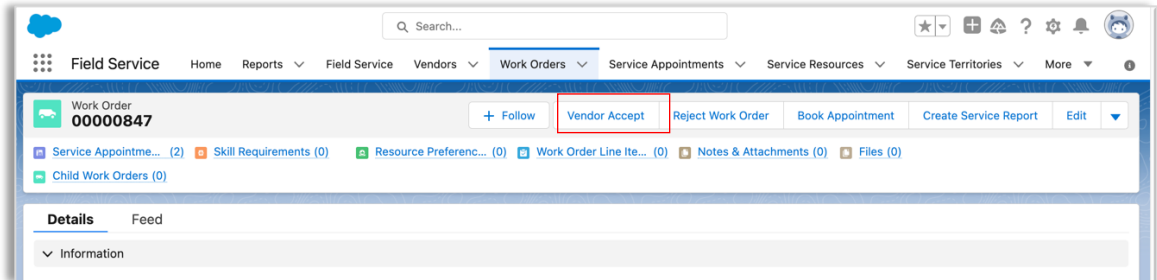
Vendor: Accepts or Rejects the Work Order

Once an Operator submits a transfer request to a Vendor, the Vendor receives a notification within the Salesforce org where they can review the Work Order and decide to Accept or Reject the Work Order.

Vendor Accepts a Work Order

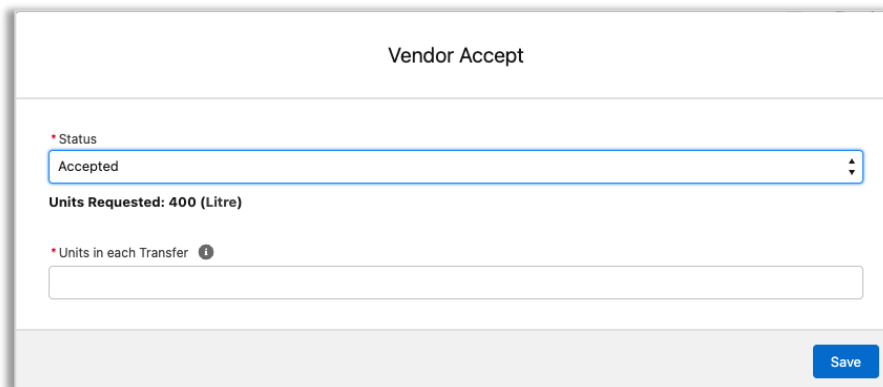
The Vendor accepts a Work Order, enters details, and then schedules and dispatches the Service Appointment(s) to Drivers.

1. Open the Work Order record and click the **Vendor Accept** button.



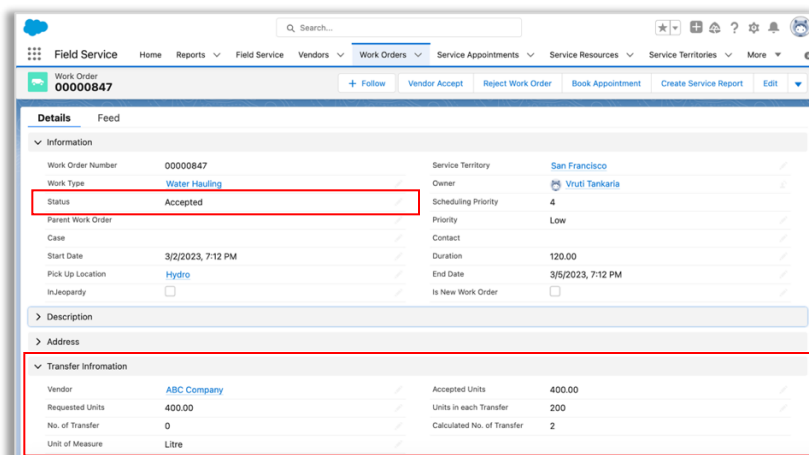
Clicking the Vendor Accept button displays the Vendor Accept screen and sets the Work Order status to Accepted.

2. In the **Vendor Accept** screen, enter a value for **Units in each Transfer**. This value is the number of units to be included in each transfer and is used to calculate the number of transfers required.



3. Click **Save**.
Upon save, the Work Order record is updated with the details in the Transfer Information section on the record page. The **Calculated No. of Transfer** field is automatically populated based on the value entered for **Units in each Transfer** and Units Requested value entered by the

Operator.

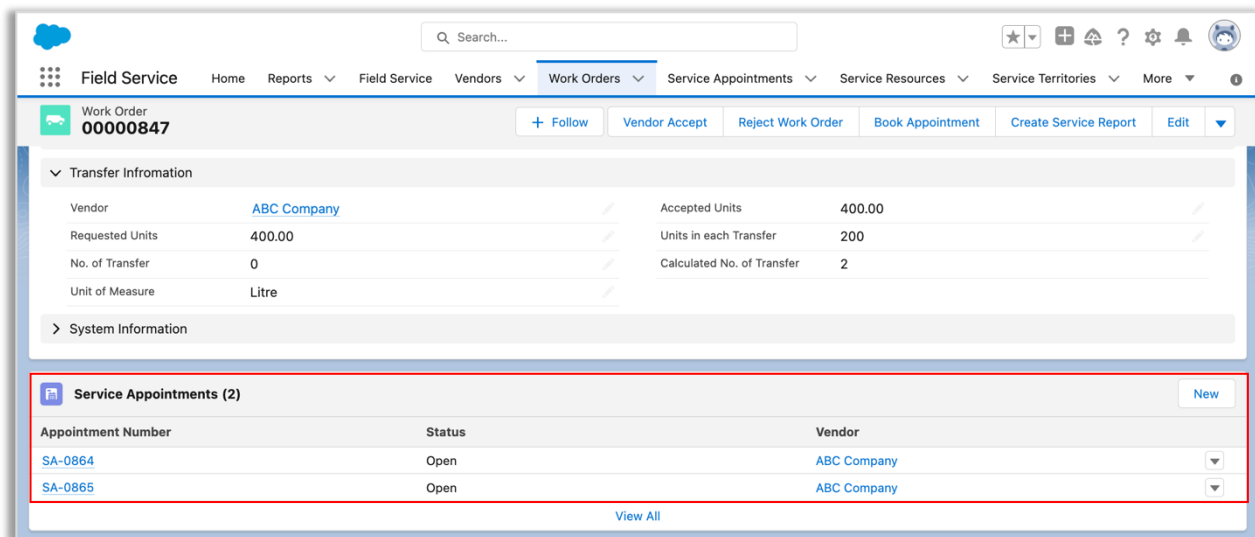


Details			
Information			
Work Order Number	00000847	Service Territory	San Francisco
Work Type	Water Hauling	Owner	Vruti Tankaria
Status	Accepted	Scheduling Priority	4
Parent Work Order		Priority	Low
Case		Contact	
Start Date	3/2/2023, 7:12 PM	Duration	120.00
Pick Up Location	Hydro	End Date	3/5/2023, 7:12 PM
InJeopardy	☐	Is New Work Order	☐
Description			
Address			
Transfer Information			
Vendor	ABC Company	Accepted Units	400.00
Requested Units	400.00	Units in each Transfer	200
No. of Transfer	0	Calculated No. of Transfer	2
Unit of Measure	Litre		

Once saved, Service Appointment(s) for the Work Order are automatically created. The number of Service Appointments created is equal to the Calculated No. of Transfer value.

The Service Appointment(s) can be accessed from the related list of the Work Order record page.

NOTE: Auto-generation of Service Appointments on accepted Work Orders is a custom setting that can be disabled. If this setting is disabled, then Service Appointments are not automatically created.



Transfer Information			
Vendor	ABC Company	Accepted Units	400.00
Requested Units	400.00	Units in each Transfer	200
No. of Transfer	0	Calculated No. of Transfer	2
Unit of Measure	Litre		
System Information			
Service Appointments (2)			
Appointment Number	Status	Vendor	
SA-0864	Open	ABC Company	
SA-0865	Open	ABC Company	
View All			

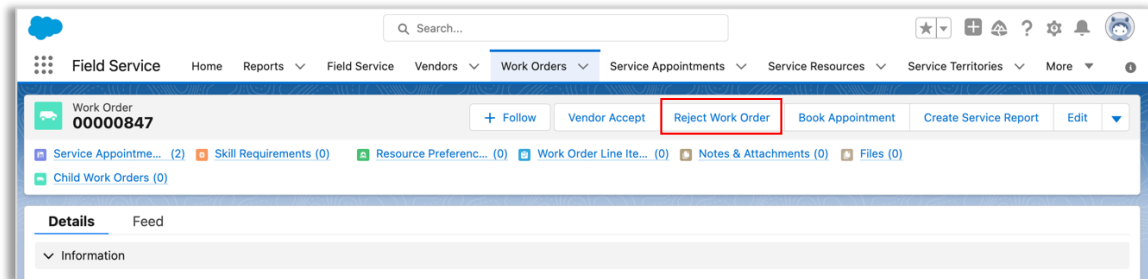
The **No. of Transfer** field is provided for cases when the Vendor needs to manually enter a value for the number of truckloads required to transfer the total Units Requested. Since the Calculated No. of Transfer value is auto calculated based on Units Requested and Units in each Transfer, and the field is not editable, having access to the No. of Transfer field allows the Vendor to manually control the number of truckloads, and consequently the number of Service Appointments generated, to complete a Work Order. Depending on your material transfer needs, and how your Work Order page layout is configured, the No. of Transfer field may not be available.

If the No. of Transfer field is the preferred method, in those cases, the Vendor Accept button must not be used to accept work orders. The Vendor Accept action button is a screen Flow that automatically sets Work Order status to Accepted and requires input for Units in each Transfer, upon Save, automatically enters a Calculated No. of Transfer value, and generates the equivalent number of Service Appointments.

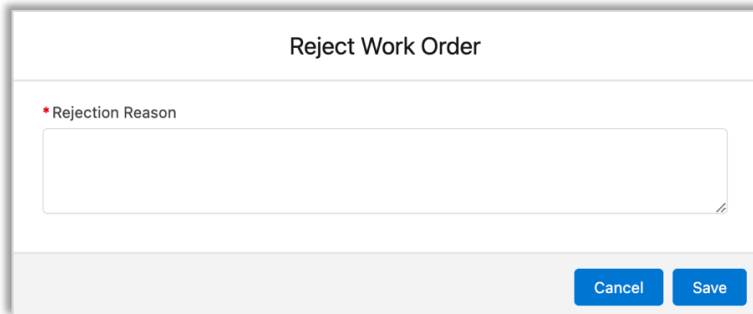
Vendor Rejects a Work Order

To reject a material transport request.

1. Open the Work Order record and click the **Reject Work Order** button.



2. From the Reject Work Order screen, enter a **Rejection Reason** and then click **Save**.

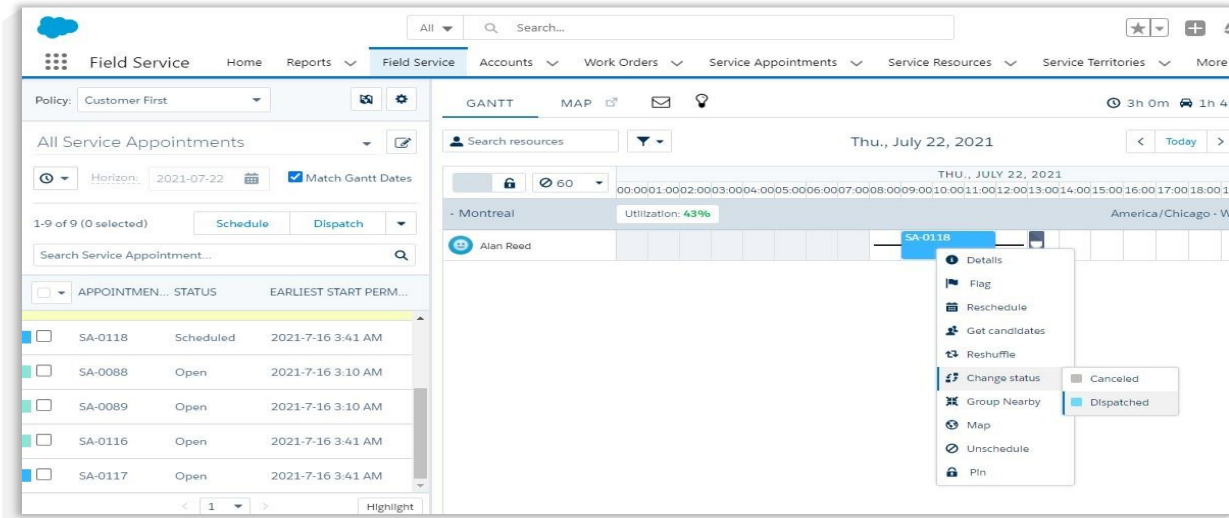


The screenshot shows a modal window titled 'Reject Work Order'. Inside the modal, there's a label 'Rejection Reason' with a red asterisk indicating it's a required field. Below the label is a large text input area. At the bottom right of the modal, there are two buttons: 'Cancel' and 'Save'.

Upon save, the Status of the Work Order is automatically updated to Rejected and the Operator receives a notification in the Salesforce org.

Vendor: Schedules and Dispatches Service Appointments

After the Work Order is accepted and the transfer information updated, the Vendor can now manually schedule the Service Appointment(s) on the Gantt in Field Service and dispatch to a Driver resource.



The screenshot displays the Field Service software interface. On the left, a sidebar shows the 'All Service Appointments' list with columns for APPOINTMENT ID, STATUS, and EARLIEST START PERM. The list includes appointments SA-0118 (Scheduled), SA-0088 (Open), SA-0089 (Open), SA-0116 (Open), and SA-0117 (Open). The main area shows a Gantt chart for Thursday, July 22, 2021, with a resource named Alan Reed. A context menu is open over the Gantt chart, showing options: Details, Flag, Reschedule, Get candidates, Reshuffle, Change status (with a sub-menu showing Canceled and Dispatched), Group Nearby, Map, Unschedule, and Pin.

Driver: Receives Service Appointment on Mobile and Updates Work Status

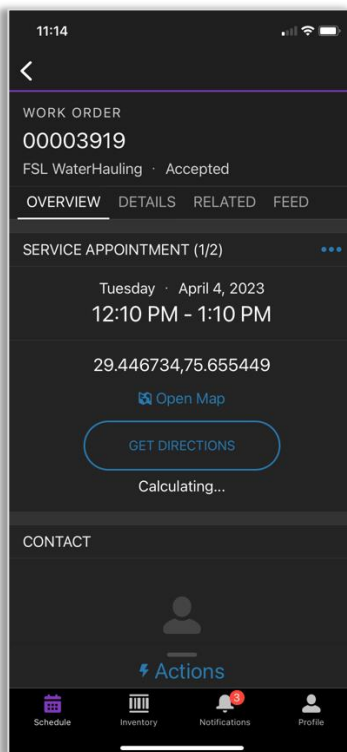
Once a Service Appointment is dispatched to a Driver, they receive a notification and can see the Service Appointment on their schedule in the Field Service Mobile App.

Within the Service Appointment, a Driver can access the parent Work Order details and change the Service Appointment status according to the stage of the Service Appointment lifecycle.

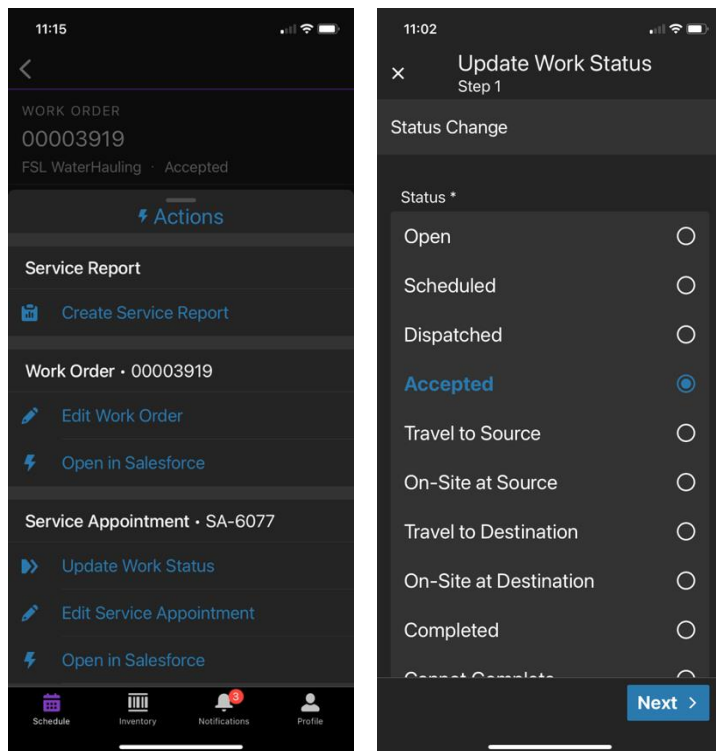
The Service Appointment record automatically updates on every status change with the relevant field details so that the Operator and Vendor-Dispatcher can stay informed on the status of all Service Appointment(s) from the office.

Accepts Service Appointment

From the home screen of the app, the Driver can view and access their Service Appointment(s) for the day. They can then tap a Service Appointment to view the details from the Overview screen.



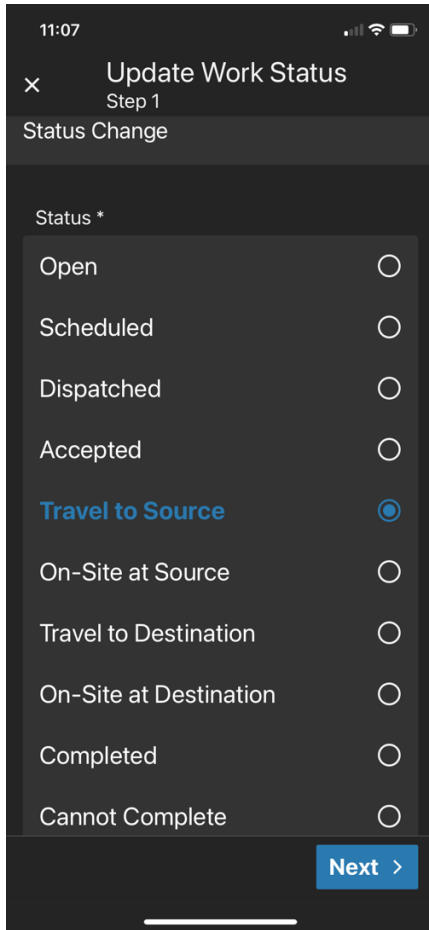
Once the Driver reviews the Service Appointment, they can update the status using **Update Work Status** from **Actions** and select **Accepted**.



The Service Appointment record will be automatically updated with the status.

Travel to Source

Once the Service Appointment is accepted and the Driver is ready to travel, they update the status to **Travel to Source**.



The screenshot shows a mobile application interface for updating work status. At the top, the status bar shows the time 11:07 and signal/battery icons. The app header includes a close button (X) and the title 'Update Work Status' with 'Step 1' below it. The main section is titled 'Status Change' and contains a list of status options, each with a radio button. The 'Travel to Source' option is selected, indicated by a blue dot in its radio button. At the bottom right, there is a blue button labeled 'Next >'.

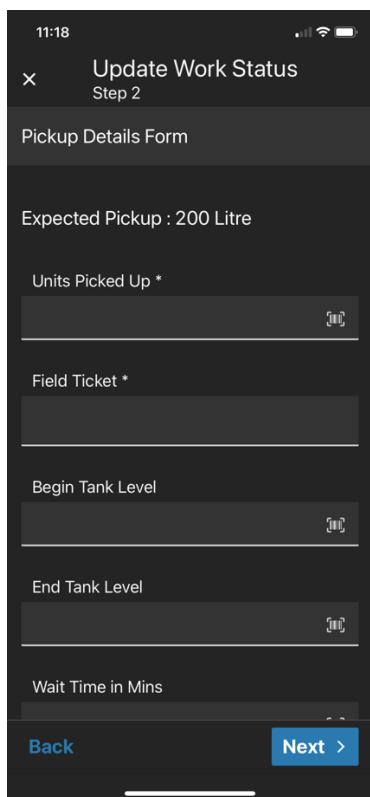
Status *	Selected
Open	☐
Scheduled	☐
Dispatched	☐
Accepted	☐
Travel to Source	☒
On-Site at Source	☐
Travel to Destination	☐
On-Site at Destination	☐
Completed	☐
Cannot Complete	☐

On-Site at Source

Once arrived on-site, the Driver changes their status to **On-Site at Source** and taps Next - the Pickup Details Form displays. The Driver must enter a value for **Units Picked Up**, and **Field Ticket**, and if applicable, values for:

- Begin Tank Level
- End Tank Level
- Wait Time in Minutes

Here, the Driver can also attach a photo of the source location to the Service Appointment.



11:18

Update Work Status
Step 2

Pickup Details Form

Expected Pickup : 200 Litre

Units Picked Up *

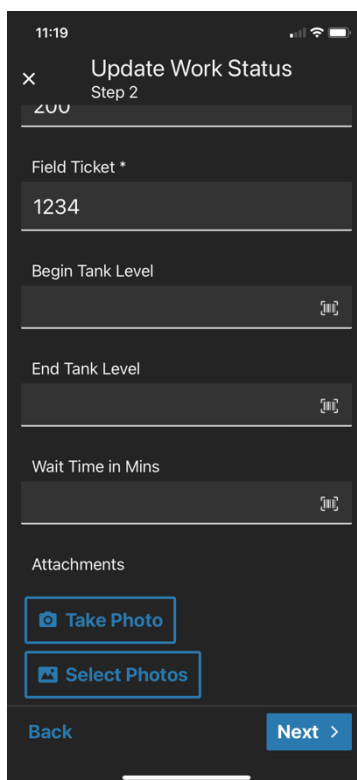
Field Ticket *

Begin Tank Level

End Tank Level

Wait Time in Mins

Back Next >



11:19

Update Work Status
Step 2

200

Field Ticket *

1234

Begin Tank Level

End Tank Level

Wait Time in Mins

Attachments

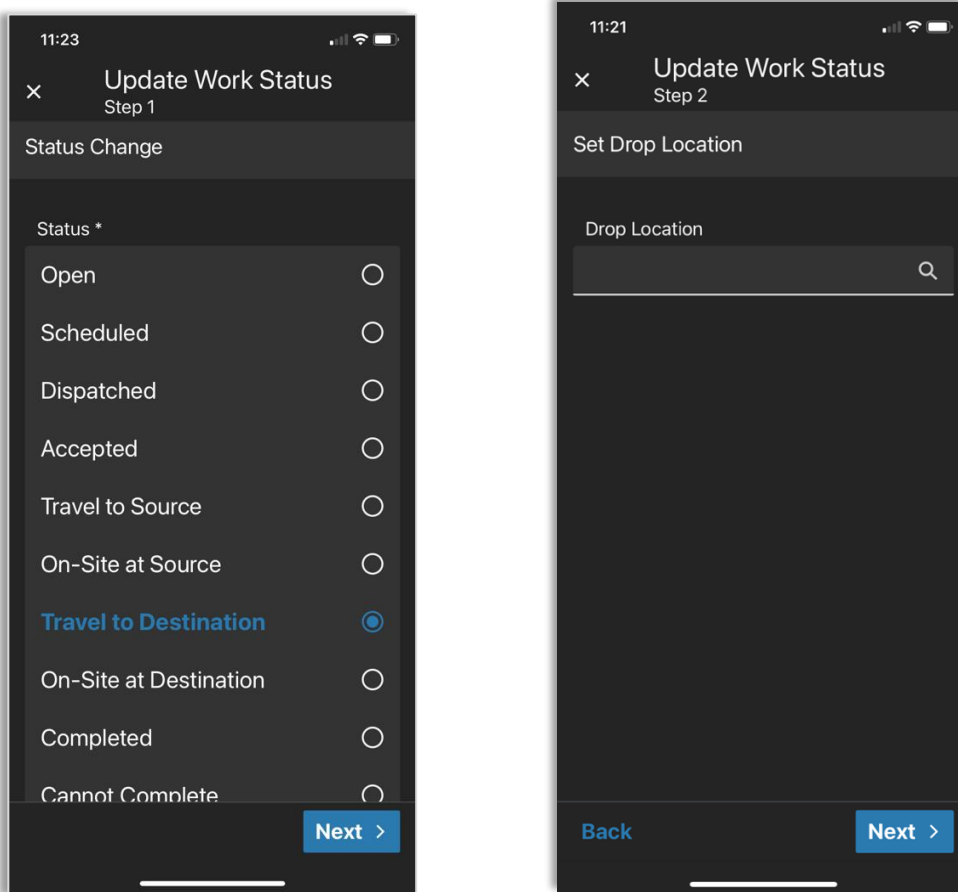
Take Photo

Select Photos

Back Next >

Travel to Destination

Once the Driver is ready to transition from the pickup location to the drop location, they update the status to **Travel to Destination** and select a **Drop Location**.



11:23

×

Update Work Status

Step 1

Status Change

Status *

Open

Scheduled

Dispatched

Accepted

Travel to Source

On-Site at Source

Travel to Destination

On-Site at Destination

Completed

Cannot Complete

Next >

11:21

×

Update Work Status

Step 2

Set Drop Location

Drop Location

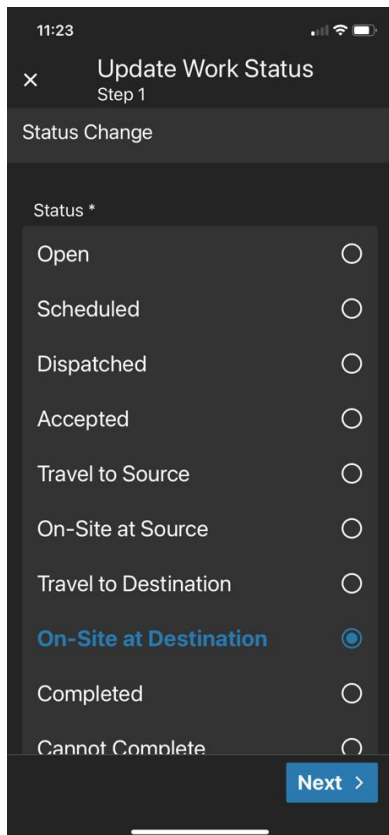
Back

Next >

On-Site at Destination

Once at destination location, the Driver changes their status to **On-Site at Destination** and enters details in the Disposal Form screen. The Driver must enter a value for **Units Disposed**, **Disposal Ticket #** and optionally, **Wait Time in Minutes**.

The Driver can also attach a photo to the Service Appointment.



11:23

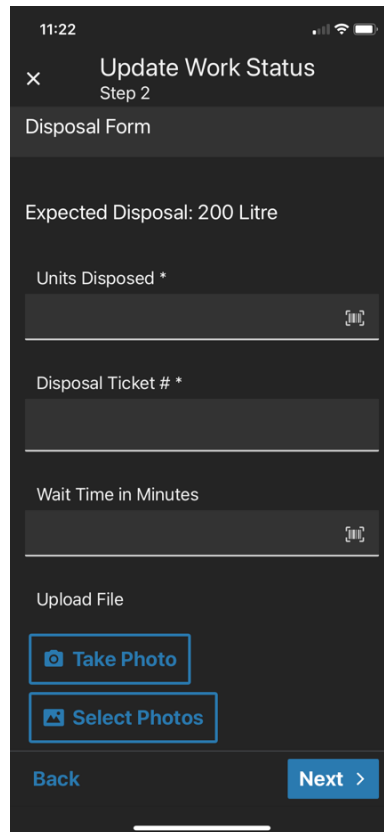
Update Work Status
Step 1

Status Change

Status *

- Open ☐
- Scheduled ☐
- Dispatched ☐
- Accepted ☐
- Travel to Source ☐
- On-Site at Source ☐
- Travel to Destination ☐
- On-Site at Destination** ☒
- Completed ☐
- Cannot Complete ☐

Next >



11:22

Update Work Status
Step 2

Disposal Form

Expected Disposal: 200 Litre

Units Disposed *

Disposal Ticket # *

Wait Time in Minutes

Upload File

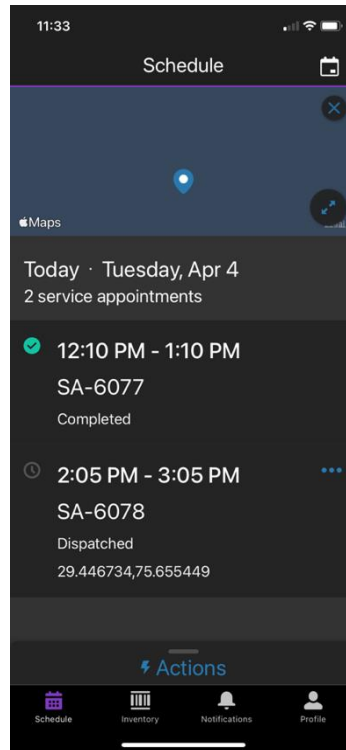
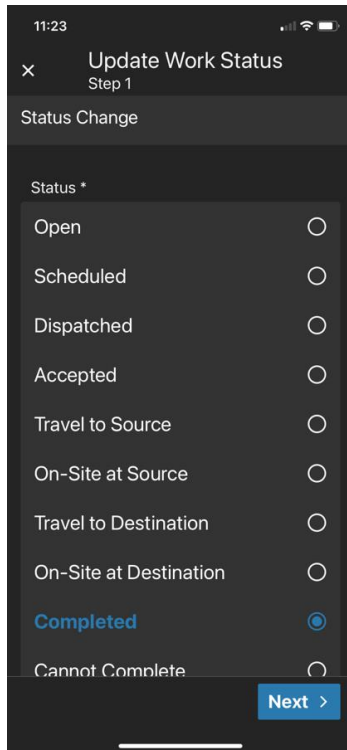
Take Photo

Select Photos

Back Next >

Completes Service Appointment

Once the Driver has disposed the units at the drop location, they set the Service Appointment status to **Completed**. The Service Appointment status shows as Completed on the Schedule screen for the Driver and the Service Appointment record is updated. Once all Service Appointments related to the parent Work Order are completed, the Work Order will automatically update to completed.



Driver Rejects Service Appointment

If a Driver cannot accept the Service Appointment, they can optionally select **Rejected** from the Update Work Status form.

After selecting Rejected, the Driver must enter a Rejection Reason. Upon save, the Vendor receives a notification, the Service Appointment status is automatically updated to Open, and the Rejection Reason field is updated with the text entered by the Driver. Also, the Service Appointment is removed from the Drivers schedule, and they can no longer access the Service Appointment.

NOTE: If the Driver receives an Upload Error when updating the status to Rejected, contact your Admin to ensure that the Status Transitions in Field Service Admin settings includes from Rejected to Open transition in the flow.

Vendor Modifies an Accepted Work Order

In cases where a Vendor has accepted a Work Order and Service Appointment(s) have been created, but they need to make changes to the transfer information, they may modify the Work Order and retrigger auto-creation of new Service Appointment(s) using the **Is New Work Order** checkbox field.

1. Open the accepted Work Order.
Note that the **Is New Order** checkbox field is unchecked. This checkbox is automatically set to false when a Work Order status is set to Accepted.
2. Locate the Service Appointment(s) in the Related List.
3. For each Service Appointment, select **Edit** and change the Status to **Canceled** or the Service Appointments can be deleted.
4. Update the transfer information as needed in the Work Order record.
5. Check the **Is New Work Order** checkbox.
6. Click **Save**.

Upon save, new Service Appointment(s) will be automatically created based on the updated information.