

# Material Transport App

## Use Cases

Version 3.3

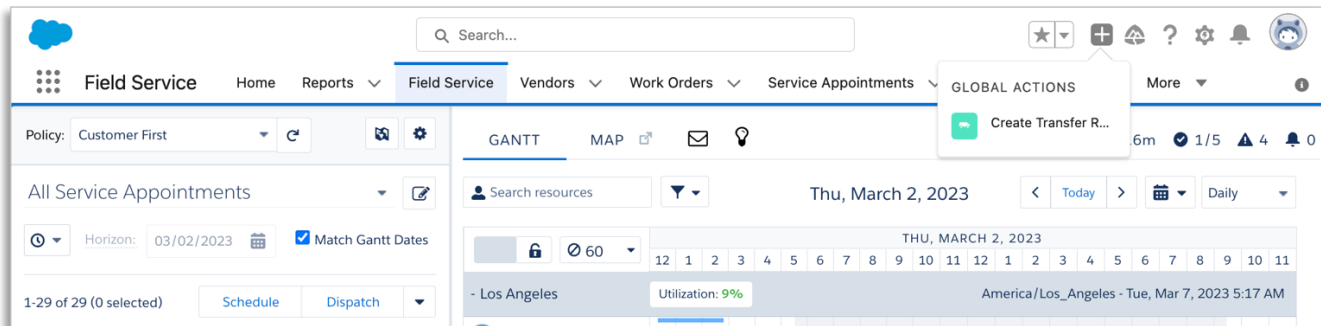


## Use Case 1

### Creating a Work Order / Material Transfer Request via Global Actions

1. As the **Operator** - The user can create a Work Order record from Global Actions by selecting "Create Transfer Request".

\*Please note that this option is only available to an Operator and is not available for Vendors.



2. The **Operator** selects a Vendor, Contact, Units Requested, Unit of Measure (Litre, Gallon, Barrel, or Tonne), Work Type, Service Territory, and Pickup Location.

A screenshot of the 'Create Transfer Request' form. The form contains the following fields: Vendor (ABC Trucking), Contact (John Doe), Start Date (2023-05-25, 9:19 AM), End Date (2023-05-28, 9:19 AM), Units Requested (400.00), Unit of Measure (Litre), Service Territory (Search Service Territories...), Work Type (Water Hauling), and Pickup Location (Well 123). A 'Save' button is located at the bottom right.

3. As the **Vendor** - The user can accept the Work Order using the Vendor Accept button on the Work Order record page.

The Status is automatically changed to Accepted and the Vendor must enter the transfer information – Accepted Units and Units in each Transfer.

Field Service Home Reports Field Service Vendors Work Orders Service Appointments Service Resources Service Territories Operating Hours

Work Order 00000853

+ Follow Vendor Accept Reject Work Order Book Appointment Create Service Report Edit

Owner: Vruti Tankaria Case: Status: Accepted Start Date: 3/6/2023, 6:26 PM End Date: 3/9/2023, 6:26 PM Subject:

Related List Quick Links: Service Appointments (2) Skill Requirements (0) Resource Preferences (1) Work Order Line Items (0) Notes & Attachments (0) Files (0) Child Work Orders (0)

Details Feed

Vendor Accept

\* Status: Accepted

Units Requested: 400 (Litre)

\* Accepted Units: 400

\* Units in each Transfer: 200

Next

The Transfer Information section in the Work Order record displays the material transfer details from the Vendor Accept screen. The Calculated No. of Transfer field is automatically populated from the values entered.

\*\* Note that the Vendor can override the calculated value by entering a value in the No. of Transfer field. In this case, Calculated No. of Transfer value will update to equal to the No. of Transfer value.

Field Service Home Reports Field Service Vendors Work Orders Service Appointments

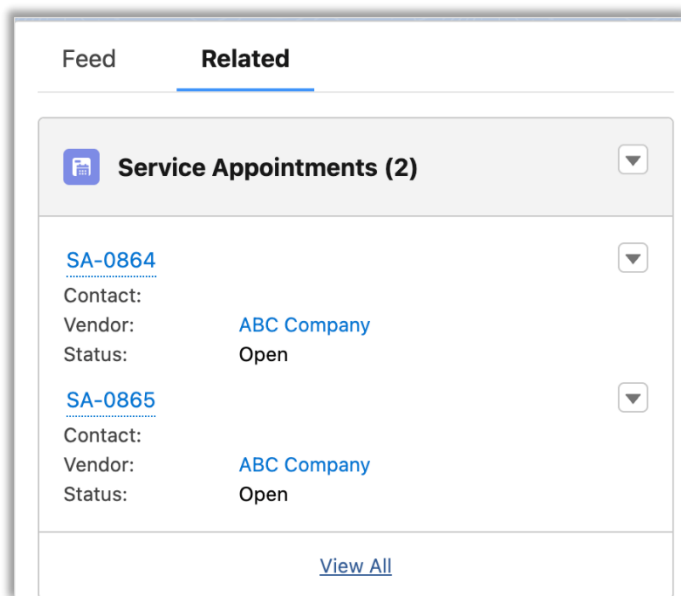
Work Order 00000847

Transfer Information

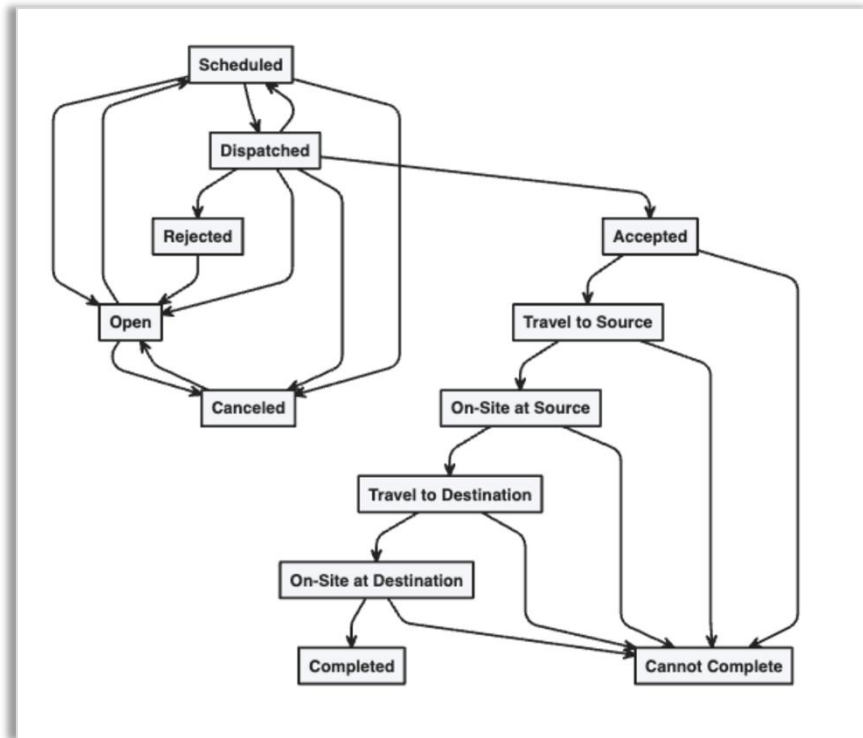
|                 |             |                            |        |
|-----------------|-------------|----------------------------|--------|
| Vendor          | ABC Company | Accepted Units             | 400.00 |
| Requested Units | 400.00      | Units in each Transfer     | 200    |
| No. of Transfer | 0           | Calculated No. of Transfer | 2      |
| Unit of Measure | Litre       |                            |        |

4. Once the Work Order is Accepted, Service Appointment(s) are created equal to the **Calculated No. of Transfer** value from the details entered by the Vendor.

The Service Appointment(s) are available in the related list of the Work Order record page as shown below.



5. The Status transition workflow for the Material Transport Service Appointment (Pick up and Drop off with Travel) looks like the following flow:



6. The Service Appointments can then be scheduled on the Gantt and dispatched to the correct Service Resource/Driver via drag and drop.

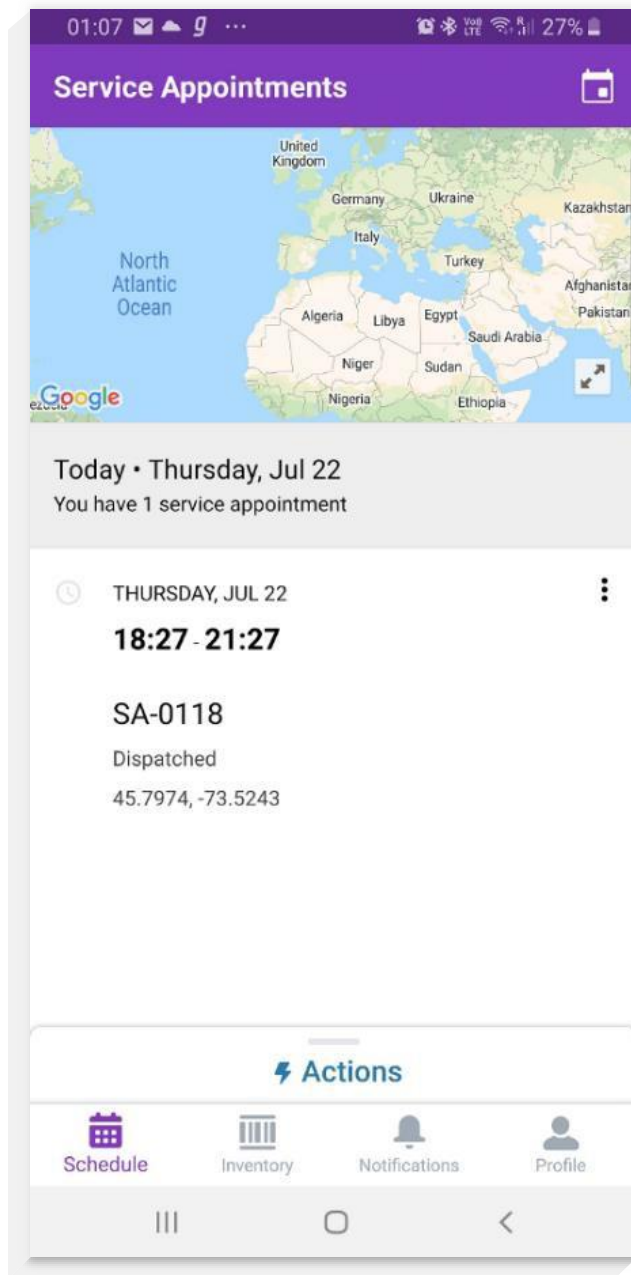
\*Please note that optimization has not been enabled for this Use Case.

The screenshot displays the Field Service software interface. On the left, a sidebar contains a list of service appointments. 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 like Details, Flag, Reschedule, Get candidates, Reshuffle, Change status, Group Nearby, Map, Unschedule, and Pin. The 'Change status' option is selected, and a sub-menu shows 'Canceled' and 'Dispatched' options.

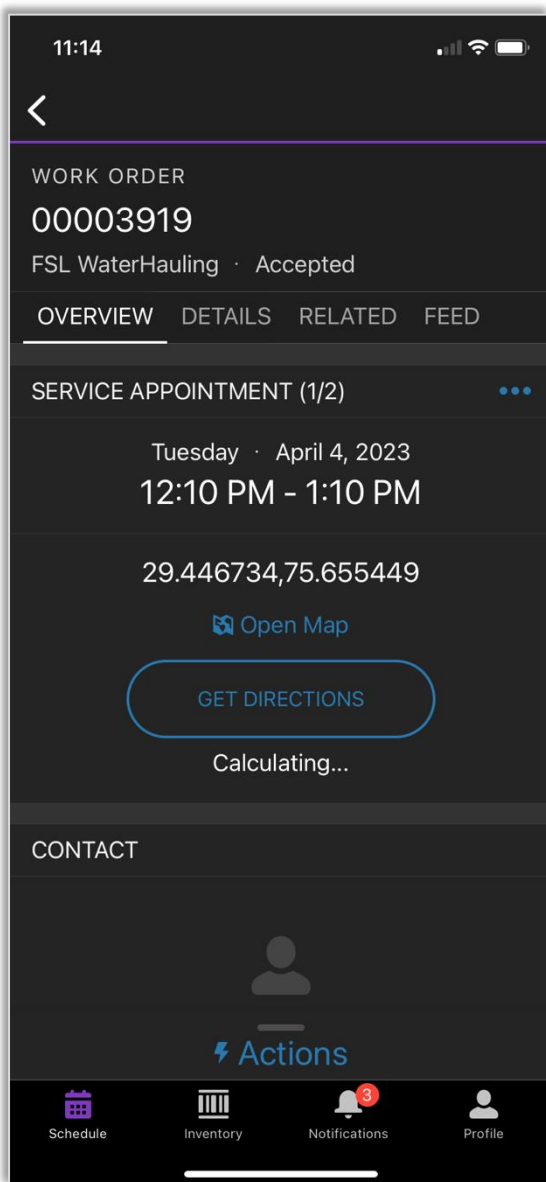
**Service Appointments List:**

| APPOINTMEN...                    | STATUS    | EARLIEST START PERM... |
|----------------------------------|-----------|------------------------|
| <input type="checkbox"/> SA-0118 | Scheduled | 2021-7-16 3:41 AM      |
| <input type="checkbox"/> SA-0088 | Open      | 2021-7-16 3:10 AM      |
| <input type="checkbox"/> SA-0089 | Open      | 2021-7-16 3:10 AM      |
| <input type="checkbox"/> SA-0116 | Open      | 2021-7-16 3:41 AM      |
| <input type="checkbox"/> SA-0117 | Open      | 2021-7-16 3:41 AM      |

7. The Service Resource/Driver can see the Service Appointment on the Field Service Mobile App.



8. Once the Service Appointment is opened, it will show the parent Work Order details.



9. Click on the Service Appointment to open and see all the Service Appointment details.

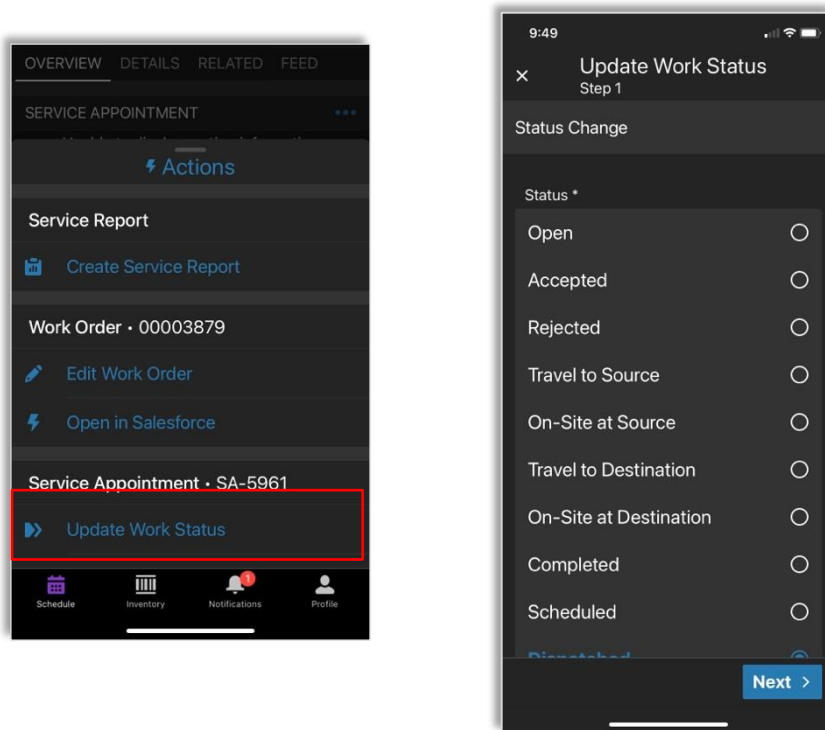
The screenshot shows a mobile application interface for a Service Appointment. At the top, there is a purple header bar with a back arrow, the title 'SERVICE APPOINTMENT', and the ID 'SA-0118'. Below the header, the text 'Ankur Rai - ABC Company - 00000048' is displayed. A tab bar below the header has 'DETAILS' and 'RELATED' options, with 'DETAILS' being the active tab. The main content area is a list of fields with their values: Appointment Number (SA-0118), Service Territory (Montreal), CallID (OCC-SA-0118), Internal SLR Geolocation (Latitude) (45.797995), Internal SLR Geolocation (Longitude) (-73.523510), Parent Record (00000048), Status (Dispatched), Parent Record Type (WorkOrder), Status Category (Dispatched), Description, Contact, Rejection Reason, and Driver Comments. At the bottom, there is a button labeled 'Actions' with a lightning bolt icon.

|                                      |             |
|--------------------------------------|-------------|
| Appointment Number                   | SA-0118     |
| Service Territory                    | Montreal    |
| CallID                               | OCC-SA-0118 |
| Internal SLR Geolocation (Latitude)  | 45.797995   |
| Internal SLR Geolocation (Longitude) | -73.523510  |
| Parent Record                        | 00000048    |
| Status                               | Dispatched  |
| Parent Record Type                   | WorkOrder   |
| Status Category                      | Dispatched  |
| Description                          |             |
| Contact                              |             |
| Rejection Reason                     |             |
| Driver Comments                      |             |

Actions

10. The Service Resource/Driver can update the Service Appointment status by going to Actions and selecting Update Work Status.

The Driver will use this Action to update their status for each status transition through the lifecycle of the Service Appointment.



11. After all Service Appointment(s) for the Work Order are complete, the Work Order status will automatically change to complete.

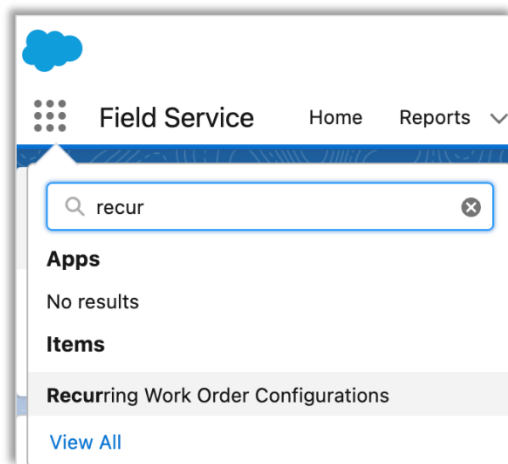
## Use Case 2

### Creating and Scheduling a Recurring Work Order

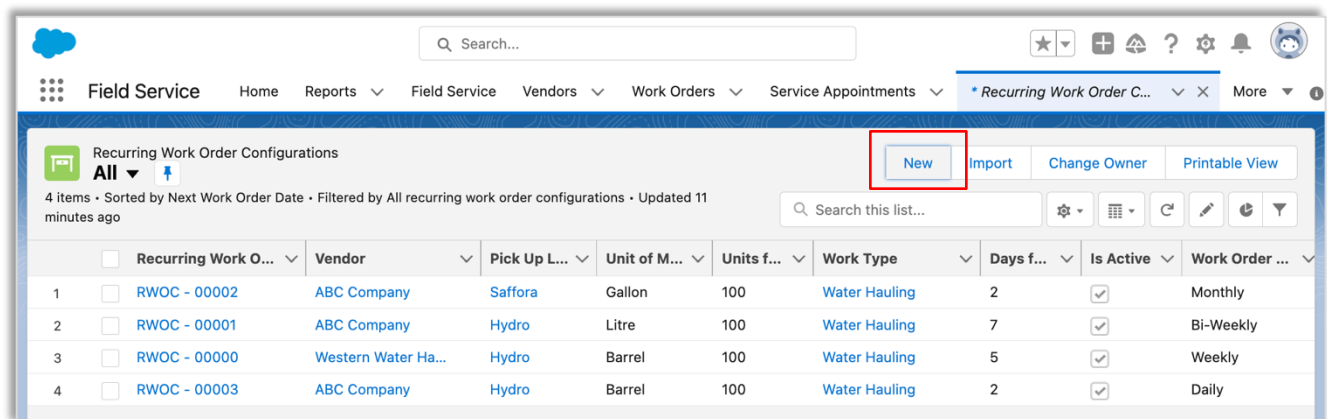
1. As the **Operator** - A Work Order can be created to perform Material Transport jobs on a recurring basis with a defined frequency using the Recurring Work Order Configuration object.

To create a Recurring Work Order Configuration record:

- a. Go to App Launcher and open Recurring Work Order Configurations.



- b. From the Recurring Work Order Configuration list view, click the New button.



- c.** The Operator enters their Recurring Work Order details - specifying the Vendor, Work Type, Pickup Location, Unit of Measure, Units for Transfer, No. of Days to Complete the Work Order, Work Order Frequency, and Next Work Order Date.

The Recurring Work Order Configuration record must be set to **Is Active** to execute the job.

New Recurring Work Order Configuration

Information

Recurring Work Order Configuration

Vendor

ABC Trucking

X

Work Type

Water Hauling

X

Pickup Location

Well 123

X

Unit of Measure

Litre

Units for Transfer

400

Work Order Frequency

Weekly

No. of Days to Complete

5

Next Work Order Date

2023-06-02

Owner

Gillian Florence

Is Active

☒

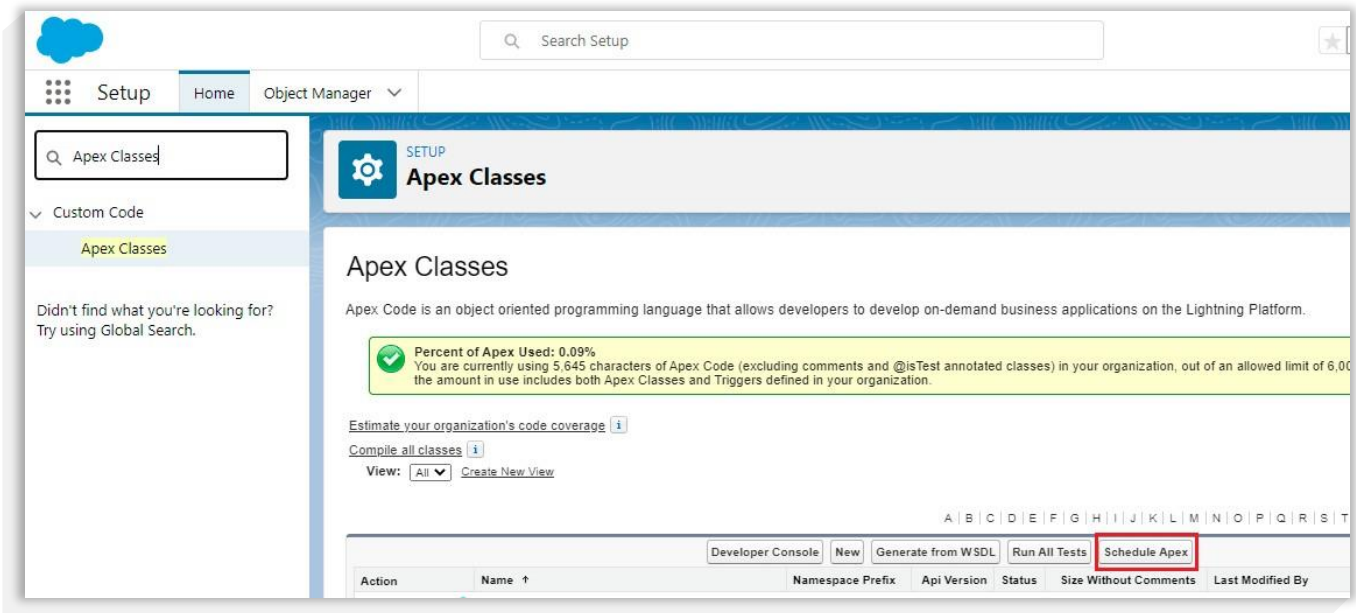
Cancel

Save & New

Save

2. An Apex Class needs to be scheduled to execute for the active Recurring Work Orders to get created.

a. Go to Setup → Apex Classes → Click Schedule Apex.



b. Provide a Job Name, click the find icon and select CreateRecurringWorkOrderSch. Schedule the execution frequency to Weekly and select every day of the week.

