



Material Transport Solution for Salesforce Field Service

Installation and Configuration Guide



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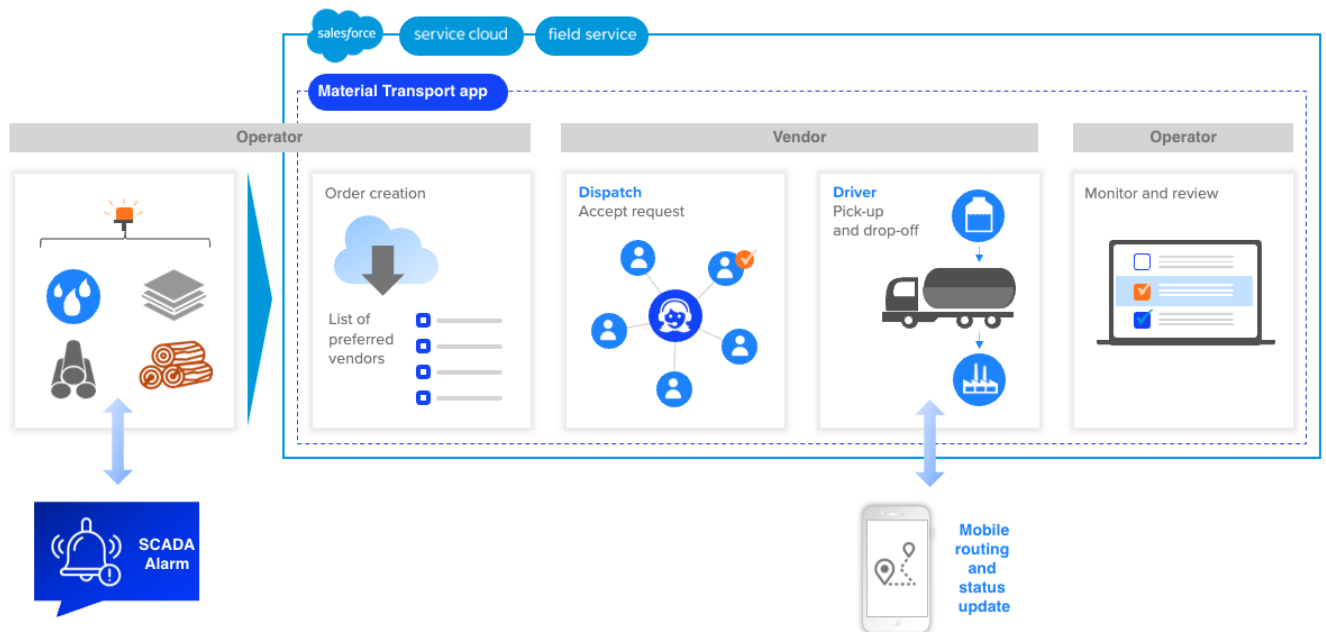
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Introduction

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

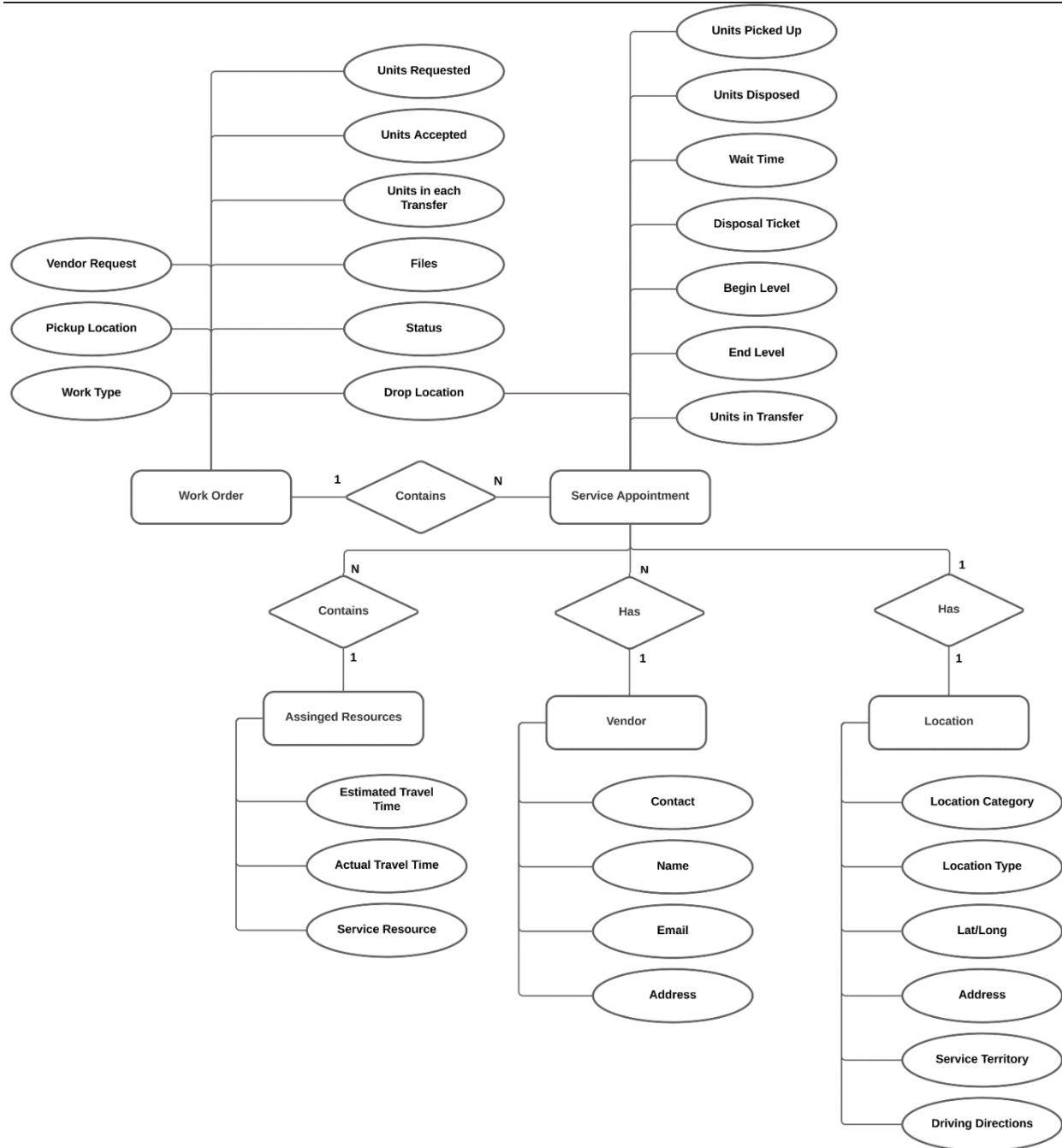
In many industries, the material transport process is a critical part of ensuring efficient operations. Diabsolut has designed a material transport solution with capabilities and benefits for the Operator, Vendor, and Driver. This digital tool can be utilized to streamline the material transport process,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

Solution Workflow



Architecture

Data Model



Metadata

Standard Objects with Custom Fields

The Location, Work Order, and Service Appointment standard objects are used in the Material Transport App solution. With the package installed, custom fields and page layouts are added to these standard objects.

Location Object

The Location object is used to manage the pickup location and the drop location that are involved in the material transport process.

The **Location Category** custom picklist field is provided to be able to select Pickup Location or Drop Location for a Location record. The value is used during the material transfer request process.

Work Order Object

The following custom fields are added to the Work Order object.

Calculated No. of Transfer – displays value from calculation of Units Accepted and Units in each Transfer.

IsMaterialTransport – a picklist field used to identify a Work Order record type for Material Transport purposes or a Work Order for other purposes. Options: True/False. This value is leveraged in code, triggers, and flows to ensure that only work orders and their child service appointments that are set for material transport use will trigger workflows and automations within the Material Transport App.

NOTE: If you are creating Work Order record types, within the record type configuration, this picklist field value must be edited so that the default value of either True or False is set according to the record type needs. If the Work Order is for material transport use, the default should be set to True. In this case whenever a Work Order is created with that record type, the record is automatically flagged as a Material Transport work order.

Is New Work Order – a checkbox field that is automatically set to false when a new Work Order is accepted, and Service Appointment(s) are generated. This checkbox field can be used to re-trigger the auto-creation of Service Appointment(s).

No. of Transfer – this field can be used by the Vendor to manually enter a value instead of using the Calculated No. of Transfer value that is auto calculated from the input of Units in each Transfer.

Pickup Location – this is a lookup field to Location object records where Location Category is equal to Pickup Location.

Pickup Location Direction Notes – long text area field used by Vendor to enter notes about pickup location. The details will be available to the driver on the Field Service Mobile App.

Rejection Reason – text field used by Vendor if rejecting a material transfer (Work Order) request. The Vendor must enter a rejection reason in this field.

Units Accepted – used by the Vendor to enter the number of units accepted for a material transfer request.

Units Requested – displays the number of units requested by the Operator for a material transfer request.

Units in each Transfer – used by the Vendor to enter the number of units in each transfer when accepting a Work Order.

Unit of Measure – this is a picklist field used to select a relevant unit for the material being transported. The Operator selects a value when creating a transfer request. Unit of Measure options: Litre, Barrel, Gallon, and Tonne. The field can be customized by adding or removing value options.

[Service Appointment Object](#)

The following custom fields are added to the Service Appointment object.

Drop Location - this is a lookup field to Location object records where Location Category is equal to Drop Location.

Pickup Location – displays the pickup location from the Work Order.

Units Accepted – displays the number of units accepted by the Vendor from the Work Order. This value is automatically equal to Units Requested.

Units Requested – displays the number of units requested by the Operator from the initial transfer request.

Units in Transfer – displays the number of units in transfer for the Service Appointment based on the Units in each Transfer entered by the Vendor and the Units Requested from the Work Order.

Units Picked Up – displays the value entered by the Driver of the number of units picked up for the Service Appointment.

Units Disposed – displays the value entered by the Driver for the number of units disposed for the Service Appointment.

Page Layouts

Page Layouts for Work Order, Service Appointment, and Location are provided with the Material Transport App. These Page Layouts are configured with standard fields as well as the Material Transport custom fields. These page layouts must be assigned to the appropriate profiles for the Operator, Vendor, and Driver users within your organization. These page layouts can also be customized to suit your organization's needs and workflows.

Work Order

Material Transport Layout page layout – includes the Transfer Information section with the following fields:

- Vendor (Lookup field to Account)
- Units Accepted
- Units Requested
- Units in each Transfer
- Calculated No. of Transfer
- No. of Transfer

Service Appointment

Material Transport Layout page layout – includes the Transfer Information section with the following fields:

- Vendor (Lookup field to Account)
- Pickup Location
- Units Accepted
- Units Requested
- Units in Transfer

Location

Material Transport Layout page layout - includes the **Location Category** custom picklist field, **Address** lookup field as well as the Pickup Location Details section configured with **Service Territory** and **Driving Directions** fields.

NOTE: The Material Transport App is a managed package and future updates will also update the included page layouts in the package. The updates will maintain any customization you have done to these page layouts. You can add/remove fields that are included in the package, your organization's own custom fields, or any standard field.

Record Types

The **Material Transport** Work Order record type is provided with the app. This record type is configured with the IsMaterialTransport picklist default value set to True and is configured to use the Material Transport page layout. The IsMaterialTransport value is leveraged in code and flows to ensure that only Work Orders that have IsMaterialTransport value set to True will trigger workflows and automations within the Material Transport App.

The **Material Transport** Service Appointment record type is also included with the app. This record type is configured to use the **Material Transport Layout** Service Appointment page layout.

Custom Object

The **Recurring Work Order Configuration** custom object is included and can be used to create work order configuration records with pre-defined work order details. With active configuration records, and the provided Apex class scheduled, work orders can be automatically created on a recurring basis.

Apex Classes

CreateRecurringWorkOrderSch -used for scheduling recurring work orders.

RecurringWOConfigTriggerHandler - checks the Work Order Record Type value in the Recurring Work Order Configuration record for matches with record types in the Work Order object. If an invalid record type is entered, then an error displays.

Validation Rules

Several Objects and Flows have validation rules. These validation rules can be modified to suit your organizations needs and workflows.

Work Order Object

Accepted_Units_Validation – ensures a Vendor enters a value for Units Accepted equal to Units Requested. This validation rule can be modified if allowing a Vendor to accept less units than requested is needed. In this case, a child Work Order will be automatically created for the remaining units.

Start_Date_should_not_be_in_past - prevents user from entering a Start Date earlier than today.

Location Object

ServiceTerritory_for_PickupLocation – prevents user from saving record if Service Territory is blank and Location Category is equal to Pickup Location.

Service_Territory_Validation – prevents user from saving record if Service Territory is not blank and Location Category is equal to Drop Location.

Update Work Status Flow

Disposal Form Screen | Units Disposed input – when a Driver changes the status of a Service Appointment on the Field Service Mobile App to On-Site at Destination, a screen displays to enter disposal details. A validation rule prevents the Driver from entering a value for Units Disposed greater than expected units.

Global Action

The **Create Transfer Request** global quick action is included with the Material Transport App. This global quick action allows the Operator to initiate a material transport request and enter the transfer details from the global actions menu. A new publisher layout must be created with this global quick action and assigned to the profile(s) used by operator users or users who will create material transport Work Orders.

This global quick action is configured to create a Material Transport record type Work Order.

NOTE: Ensure that the profile(s) that have access to the **Create Transfer Request** global quick action, are also assigned the Material Transport record type. If the Material Transport Work Order record type is not assigned to the user's profile, then the Create Transfer Request global quick action will not be available in the global actions menu, even if the global quick action is assigned to the profile.

Flows

There are several flows included with the Material Transport App that carry out various automation processes and provide UI interactions to help users complete tasks more efficiently.

NOTE: The flows included in the Material Transport App are configured to only run where the **IsMaterialTransport** picklist value is set to True for Work Orders. The Material Transport Work Order record type is included with the app with the IsMaterialTransport default value set to True. You may create additional Work Order record types and configure this picklist value accordingly.

Diab Capture Image – a Field Service Mobile screen flow that provides Drivers with the ability to capture an image from the Field Service Mobile App and updates the Service Appointment record with the image file(s). Users are allowed to upload multiple files. Accepted file formats: .jpg,.png,.pdf, .heif

NOTE: This flow is a template and must be cloned and then added as an App Extension in Field Service Mobile App Settings.

Handle Service Appointment Before – an autolaunched flow that is triggered when a Service Appointment is created or updated (no entry conditions). This flow runs *before* the record is saved to

the database. This flow checks the value of the IsMaterialTransport field of the parent Work Order. If IsMaterialTransport = True, then a decision element evaluates the Status field value.

This flow updates the Gantt Color field based on the status of the Service Appointment and completes the following actions:

- Copies the Drop Location, and Latitude and Longitude when a Drop Location is selected in the Field Service Mobile App.
- Sets the Actual Start Date when Status is updated to Accepted (or other In Progress category).
- Sets the Actual End Date when Status is updated to Cannot Complete or Completed.

Handle Work Order Before – an autolaunched flow that runs when a Work Order record type with the IsMaterialTransport picklist value set to True is created or updated. This flow updates Work Order fields and completes the following actions:

- Updates the Location and Service Territory fields for the Work Order from the Location record (Pickup Location category).
- Sets the InJeopardy field to true if Units Accepted < Units Requested.
NOTE: This only occurs if the validation rule is modified to allow accepting units less than units requested.

Notification - Driver Reject SA – an autolaunched flow that runs *after* the record is saved to the database and is triggered when a Service Appointment record is updated, with entry conditions: Status field = Rejected.

This flow checks the value of the IsMaterialTransport field of the parent work order, if equals True, then a custom notification is sent to the \$Record > Vendor > Owner Id of the Service Appointment and updates the Service Appointment record Status field to Open. Also, if the Is Excluded field of the assigned service resource for the service appointment is False, then a Resource Preference record is created related to the work order, the Service Resource record is then updated with Is Excluded set to true.

NOTE: If the Vendor/Account field is empty, then a notification is not sent.

Notification – Vendor Get when Wo Created – an autolaunched flow that is triggered when a Work Order is created, with entry conditions: IsMaterialTransport field = True AND AccountID field Is Null = False, then a custom notification is sent to \$Record > Vendor > Owner ID of the Work Order. The Custom Notification Type record, Vendor_Notification is used.

Notification – When Vendor Reject WO – an autolaunched flow that is triggered when a Work Order record is updated, with entry conditions: OwnerId Is Null = False AND IsMaterialTransport field = True AND Status field = Rejected, then sends a custom notification to \$Record > Owner ID (User) > User ID of the Work Order. The Custom Notification Type record, Vendor_Notification is used.

Set Service Appointment Record Type – an autolaunched flow that is triggered when a Service Appointment is created (no entry conditions). This flow sets the Service Appointment record type to Material Transport if its parent Work Order has IsMaterialTransport value set to True.

This flow overrides any default Service Appointment record type set for the profile to ensure that service appointments that are created from the Vendor Accept screen flow are created as Material Transport record types.

Update Work Status – a Field Service Mobile flow used by Drivers on the Field Service Mobile App to update the Service Appointment status as they transition through the service appointment lifecycle. The Service Appointment record is automatically updated on each status change as well as related field values. As part of the configuration steps, this Flow must be added to the Field Service Mobile App as an App Extension and as an Action for Service Appointments. Refer to [Add Flow for Service Appointment Updates](#)

A default outcome path is included to support any other Service Appointment statuses that you may add and use in your service appointment lifecycle. If the value is added to the Status field and the Status Transition is configured, and the Driver can see and select the value, then the Service Appointment record will be updated with the selected status. You can modify the Picklist Choice Set in the Flow to suit your organization's needs.

No other actions are configured for the Default Outcome path. If additional actions are required to support your business processes, such as sending notifications or field updates, the copied version of the Update Work Status Flow can be modified to support your processes.

NOTE: This Flow supports Service Appointment record updates and status updates for Material Transport Work Order/Service Appointments only. You will need to create a Field Service Mobile Flow and add the action to the Field Service Mobile App as an App Extension to support other Service Appointment status transitions and workflows.

Vendor Accept Flow – a screen flow that allows a Vendor to accept a Work Order from the record page. This flow is configured on the Vendor Accept quick action for Work Order object. The UI allows the user to enter Units in each Transfer and quickly set the Work Order status to Accepted. Upon saving, the corresponding number of Service Appointments are automatically created.

NOTE: The Vendor Accept action button should be configured in the Work Order lightning record page to only be visible when a Work Order is status = New AND IsMaterialTransport = True.

Refer to [Configure Work Order Lightning Record Page](#).

Custom Settings

The **General Setting** custom setting is included with the Material Transport App. This custom setting provides the ability to enable/disable the following automatic actions within the material transport workflow:

- Service Appointments are automatically created when a Work Order is accepted.
- Work Orders are automatically completed when all Service Appointments are completed.
- Work Order Line Items are automatically completed when all Service Appointments are completed.

Custom Labels

Invalid Work Order Recordtype – this custom label is used for the error message that displays if, while a user is creating a Recurring Work Order Configuration record, they enter an invalid Work Order record type (API name) in the Work Order Record Type field. The error message that displays can be modified using this custom label.

Current custom label: Work Order Record type value is not a valid record type in work order object.

Custom Notifications

Driver Notification – configuration for push notification to Driver on Field Service Mobile App when a Service Appointment has been dispatched.

Vendor Notification – configuration for push notification to Vendor on desktop when a Work Order has been assigned.

Installation

Prerequisites

Before installing the Material Transport App, ensure that the following prerequisites are met.

Prerequisite	Details
Salesforce Edition	Professional, Enterprise, or Unlimited
Field Service add-on license	Salesforce Field Service add-on license, or one Salesforce Field Service Plus license is required to download and use the Material Transport App. Contact your Salesforce Account Executive to enable Field Service add-on license.
Field Service enabled	With a Field Service add-on license, ensure that Field Service is enabled before installing the Field Service Managed package. To verify, locate Field Service Settings from Setup. If Field Service is not enabled, the Field Service managed package will not install. NOTE If you don't have a Field Service add-on license, you will just see an option to enable Work Orders, which is on by default. You must have the option to enable Field Service. Refer to Salesforce help document: Enable Field Service
Field Service Managed Package installed	Salesforce Field Service Managed Package must be installed in the same Salesforce org that the Material Transport App will be installed. Click this link to install the managed package: Field Service Package Installation Hub.

To install the Material Transport App:

1. Go to Material Transport in AppExchange.
2. Click **Get It Now**.
3. Login to the Salesforce org where you want to install the app.
4. Select **Install for All Users** and then click **Install**. The installation may take a while. Check your email for confirmation that the installation was successful.
5. Once the installation is complete, go to Setup and confirm the installation in **Installed Packages**.

Once you have confirmed a successful installation, you can proceed to configuring your org by following the procedures outlined in the next section.

Configuration

After installing the Material Transport App, you must complete the following configuration procedures for the features to function within your workflows for Operator, Vendor-Dispatcher, and Driver users.

- [Assign Licenses](#)
Assign Permission Set Licenses and Package Licenses to users.
- [Add Global Action](#)
Create a Publisher Layout and add a Global Action which will be used by the Operator to submit transfer requests to a Vendor.
- [Add Status Values](#)
New status values must be added to the Status field for the Work Order and Service Appointment objects.
- [Set Field-Level Security](#)
Field level security must be set on Vendor profiles for several Work Order custom fields.
- [Configure and Assign Page Layouts](#)
Configure and assign page layouts for Work Order, Service Appointment, and Location objects.
- [Configure Work Order Lightning Record Page](#)
Flow and record update actions are provided with the installation. These Actions need to be added and configured in the Highlights Panel on the Work Order lightning record page.
- [Create Location Records](#)
Create Location records that include a Location Category as either Pickup Location or Drop Location.
- [Create Work Type Records](#)
Create relevant Work Types for your organization's material transport uses. A Work Type is selected when a transfer request is created.
- [Configuration for Specific Use Cases](#)
Information, setup, and considerations on how to configure your org for specific use cases.
- [Configure for Field Service Mobile App](#)
The **Update Work Status** Flow is included and is used to help Drivers complete a Service Appointment on the Field Service Mobile App.
- [Configure Status Transitions](#)
Your desired Service Appointment status transitions must be configured in Field Service Settings.
- [Configure Recurring Work Orders](#)
The Material Transport App includes capabilities that supports recurring work orders with pre-defined details. Enabling this feature is optional.

NOTE: This section provides steps that the Salesforce admin should follow and use as a guideline to ensure that the Material Transport App is accessible within the org. The steps are documented from the perspective that the Material Transport App is implemented on a baseline Salesforce Field Service setup with no additional configuration. The configuration shown in these procedures may not be the same for your org.

Sharing Settings

The following org sharing settings are recommended to grant the level of access required for users to effectively use the Material Transport App.

- **Service Appointment:** Public Read Only
- **Work Order:** Public Read Only

NOTE: If Service Appointment is set to Private, an error will occur when the Driver sets the status of a Service Appointment to Rejected. When a Service Appointment that is dispatched to a Driver is set to Rejected, the following actions are triggered:

- Access to the Service Appointment record is removed from the dispatched service resource.
- A trigger runs to check if the parent Work Order has additional Service Appointments, and if they are completed, and if any child work orders are also completed, then the parent work order status is updated to completed.

When the driver rejects the service appointment, the service appointment access is removed from the driver, but the trigger runs in the context of the current user to query the service appointment and parent work order. If the Service Appointment sharing settings is Private, then in this scenario, no data will be found due to record access, and a run-time error will be thrown by the trigger.

For this process to function, the Service Appointment must be set to Public Read Only.

Assign Licenses

Field Service Permission Set Licenses and Permission Sets

Ensure that users in your org are assigned the appropriate Field Service Permission Set Licenses and Permission Sets as outlined in table below.

Refer to Salesforce help documentation:

[Field Service Permission Set Licenses](#)

[Assign Permissions](#)

User	Permission Set License	Permission Set
Operator / Producer	Field Service Standard	Field Service Admin License Field Service Admin Permissions
Vendor - Dispatcher	Field Service Dispatcher	Field Service Agent License Field Service Agent Permissions Field Service Dispatcher License Field Service Dispatcher Permissions
Drivers	Field Service Mobile Field Service Scheduling	Field Service Mobile License Field Service Resource License Field Service Resource Permissions

Assign Package Licenses

The Material Transport App is a licensed managed package. Once the package is installed, you need to assign a package license to each of the users within your organization that need access to the App functionality, including Operator, Vendor-Dispatcher, and Driver users.

1. From Setup, enter installed packages in the Quick Find box, and select **Installed Packages**.
2. Click **Manage Licenses** next to the Material Transport package.

SETUP Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "in Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

[Visit AppExchange »](#)

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppE
Uninstall Manage Licenses	FSL	Salesforce	240.0.45	FSL	Active	Unlimited	0	☐	Does not Expire	10/13/2022, 4:01 PM	☐	2	7	50	Not F
Uninstall	Salesforce Connected App	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A	N/A	N/A	10/13/2022, 4:01 PM	☒	0	0	0	Not F
Uninstall	Salesforce Field Service App Package	Salesforce	1.52	sf_fieldservice	Free	N/A	N/A	N/A	N/A	5/24/2023, 6:46 PM	☒	0	0	0	Not F
Uninstall Manage Licenses	Field Service Appointment Assistant	Salesforce	242.0	FSAA	Active	Unlimited	0	☐	Does not Expire	10/13/2022, 4:01 PM	☐	0	0	0	Pass
Uninstall Manage Licenses	Material Transport	Diabsolut O&G dev	3.1	diab_wh	Active	5	2	☐	Does not Expire	5/30/2023, 7:51 PM	☐	0	3	6	Pass

- From the Package Manager page click **Add Users**.

SETUP Package Manager

Package Details
Material Transport
[Back to Previous Page](#) [Help for this Page](#)

[Enable for Platform Integrations](#)

Package Name	Material Transport	Publisher	Diabsolut O&G dev
Status	Active	Allowed Licenses	5
Expiration Date	Does not Expire	Used Licenses	2
Enabled for Platform Integrations	☐		

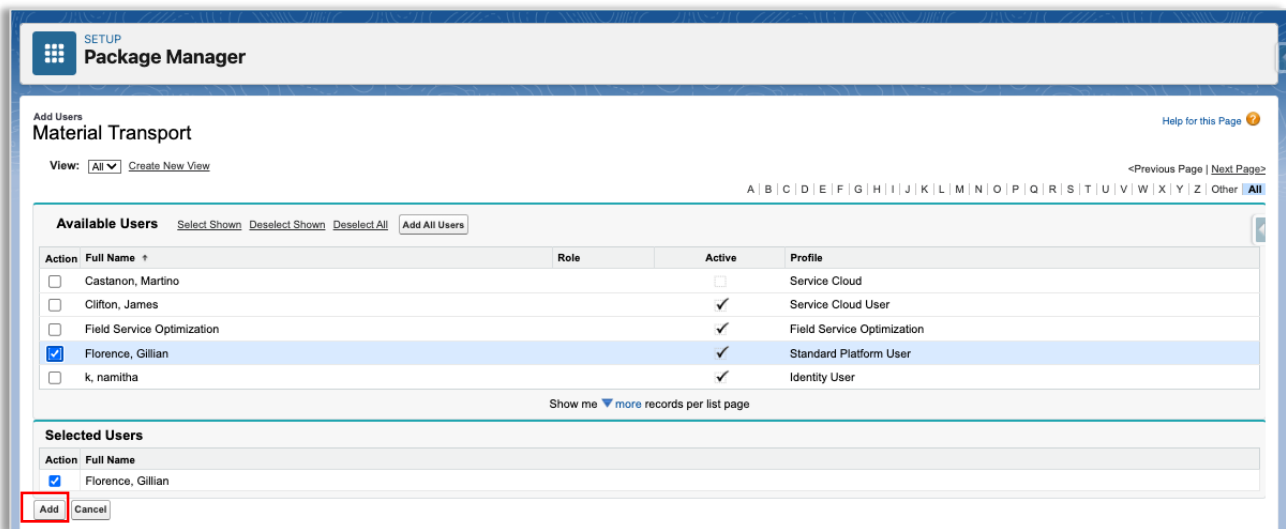
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | [All](#)

Licensed Users [Add Users](#) [Remove Multiple Users](#)

Action	Full Name ↑	Role	Active	Profile
Remove	Reed, Alan	Eastern Sales Team	✓	Water Hauling
Remove	Tankaria, Vrutli		✓	System Administrator

- Locate the users in the Available Users list and use the checkboxes to select. The selected users will show in the Selected Users section.

- Once you have selected all the users you want to assign licenses to, click **Add**.



SETUP Package Manager

Add Users
Material Transport

View: All [Create New View](#)

<Previous Page | [Next Page](#)>

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | [All](#)

Available Users [Select Shown](#) [Deselect Shown](#) [Deselect All](#) [Add All Users](#)

Action	Full Name ↑	Role	Active	Profile
☐	Castanon, Martino		☐	Service Cloud
☐	Clifton, James		☒	Service Cloud User
☐	Field Service Optimization		☒	Field Service Optimization
☒	Florence, Gillian		☒	Standard Platform User
☐	k, namitha		☒	Identity User

Show me [more records per list page](#)

Selected Users

Action: Full Name

☒ Florence, Gillian

[Add](#) [Cancel](#)

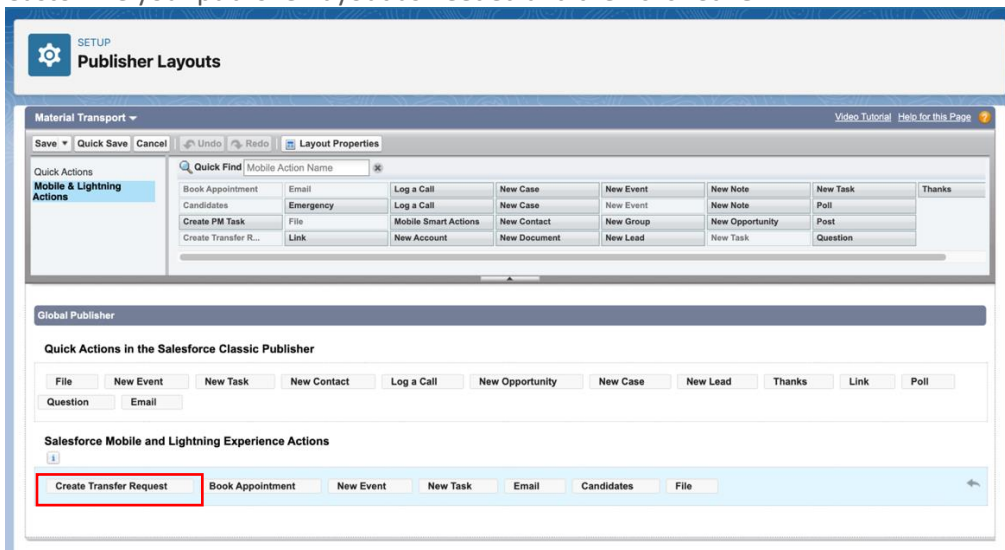
NOTE: Users within your organization that do not have a package license assigned will not be able to access any custom fields or be able to run any Flows associated with the Material Transport App - Flows will fail, even for System Administrator users.

Add Global Action

The Material Transport App includes the **Create Transfer Request** global quick action. This global quick action must be added to a publisher layout and assigned to the profile used by Operators, who will use this global quick action to submit transfer requests to a Vendor/Account.

First, create a new publisher layout and add the **Create Transfer Request** global quick action.

1. From Setup, enter publisher layouts in the Quick Find box, then select **Publisher Layouts**.
2. From the Global Publisher Layout page, click **New**.
3. In the **Existing Publisher Layout** dropdown select Global Layout.
4. Enter a Publisher Layout Name and click **Save**.
5. From the palette, click **Mobile & Lightning Actions** and move **Create Transfer Request** global quick action to Salesforce Mobile and Lightning Experience Actions area.
6. Customize your publisher layout as needed and then click **Save**.



SETUP Publisher Layouts

Material Transport

Save Quick Save Cancel Undo Redo Layout Properties

Quick Actions

Mobile & Lightning Actions

Quick Find Mobile Action Name

Book Appointment	Email	Log a Call	New Case	New Event	New Note	New Task	Thanks
Candidates	Emergency	Log a Call	New Case	New Event	New Note	Poll	
Create PM Task	File	Mobile Smart Actions	New Contact	New Group	New Opportunity	Post	
Create Transfer R...	Link	New Account	New Document	New Lead	New Task	Question	

Global Publisher

Quick Actions in the Salesforce Classic Publisher

File New Event New Task New Contact Log a Call New Opportunity New Case New Lead Thanks Link Poll

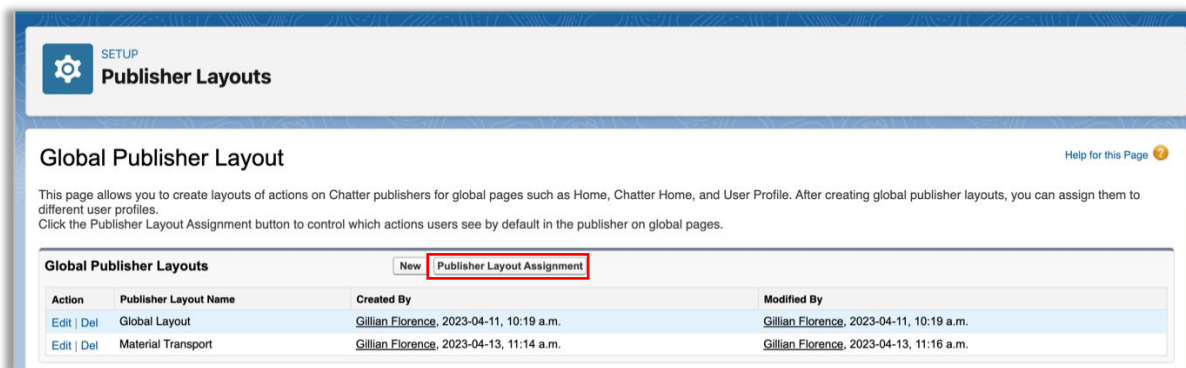
Question Email

Salesforce Mobile and Lightning Experience Actions

Create Transfer Request Book Appointment New Event New Task Email Candidates File

Next, assign the new global publisher layout to the profile assigned to your Operators.

1. From the Global Publisher Layout page, click **Publisher Layout Assignment**.



SETUP Publisher Layouts

Global Publisher Layout

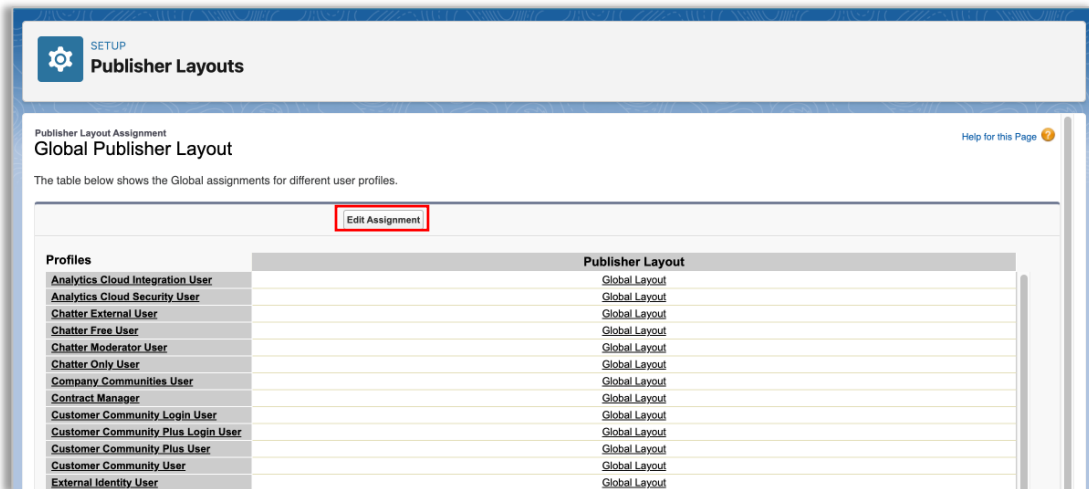
Help for this Page

This page allows you to create layouts of actions on Chatter publishers for global pages such as Home, Chatter Home, and User Profile. After creating global publisher layouts, you can assign them to different user profiles. Click the Publisher Layout Assignment button to control which actions users see by default in the publisher on global pages.

Global Publisher Layouts New Publisher Layout Assignment

Action	Publisher Layout Name	Created By	Modified By
Edit Del	Global Layout	Gillian Florence, 2023-04-11, 10:19 a.m.	Gillian Florence, 2023-04-11, 10:19 a.m.
Edit Del	Material Transport	Gillian Florence, 2023-04-13, 11:14 a.m.	Gillian Florence, 2023-04-13, 11:16 a.m.

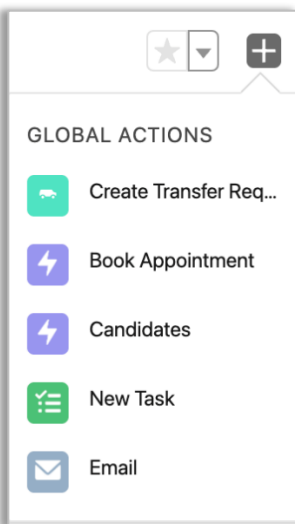
2. Click **Edit Assignment**.



3. Select the profile assigned to Operators and any other profiles that require access to the Create Transfer Request global quick action.
4. In the **Publisher Layout To Use** dropdown, select the new global publisher layout that you created and click **Save**.

The Create Transfer Request global quick action will now be available for the user from the Global Actions menu.

NOTE: Ensure that the profile(s) that have access to the **Create Transfer Request** global quick action, are also assigned the Material Transport Work Order record type. If the Material Transport Work Order record type is not assigned to the user's profile, then the Create Transfer Request global quick action will not be available in the global actions menu, even if the global quick action is assigned to the profile.



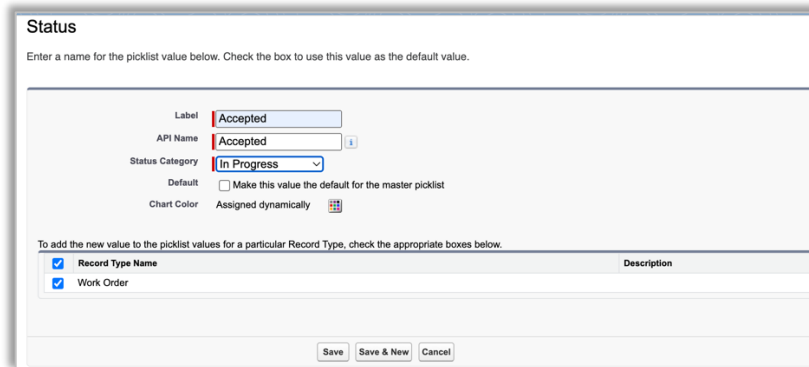
Add Status Values

To support the material transport workflow, new values must be added to the Status field for the Work Order and Service Appointment objects.

Work Order Status Values

First, add **Accepted** status value to Work Order.

1. In Setup, click **Object Manager** and select **Work Order**.
2. Select **Fields & Relationships** and then click **Status**.
3. From the Status Picklist Values section, click **New** and enter details:
 - a. **Label:** enter Accepted.
 - b. **API Name:** enter Accepted.
 - c. **Status Category:** select In Progress.
4. Select the appropriate **Work Order** record type(s) and click **Save**.



Status

Enter a name for the picklist value below. Check the box to use this value as the default value.

Label:

API Name:

Status Category:

Default: ☐ Make this value the default for the master picklist

Chart Color: ☐ Assigned dynamically

To add the new value to the picklist values for a particular Record Type, check the appropriate boxes below.

Record Type Name	Description
☒ Work Order	

Save Save & New Cancel

Next, add **Rejected** status value to Work Order.

1. From Setup, click **Object Manager** and select **Work Order**.
2. Select **Fields & Relationships** and then click **Status**.
3. From the Status Picklist Values section, click **New** and enter details:
 - a. **Label:** enter Rejected.
 - b. **API Name:** enter Rejected.
 - c. **Status Category:** select New.

4. Select the appropriate **Work Order** record types and click **Save**.

Status

Enter a name for the picklist value below. Check the box to use this value as the default value.

Label

API Name

Status Category

Default

☐ Make this value the default for the master picklist

Chart Color

☐ Assigned dynamically

To add the new value to the picklist values for a particular Record Type, check the appropriate boxes below.

	Record Type Name	Description
☒	Work Order	

Review the Status Picklist Values for Work Order. If no other customization for Status has been added since your initial SFS installation, the Status Picklist Values for Work Order will be as shown in the following image. Ensure to reorder the Statuses so that they are presented to users in a logical order for ease of use.

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Work Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Validation Rules

No validation rules defined.

Status Picklist Values

Action	Values	API Name	Status Category	Default	Chart Colors
Edit Deactivate	New	New	New	☒	Assigned dynamically
Edit Del Deactivate	In Progress	In Progress	In Progress	☐	Assigned dynamically
Edit Del Deactivate	On Hold	On Hold	On Hold	☐	Assigned dynamically
Edit Del Deactivate	Completed	Completed	Completed	☐	Assigned dynamically
Edit Del Deactivate	Closed	Closed	Closed	☐	Assigned dynamically
Edit Del Deactivate	Cannot Complete	Cannot Complete	Cannot Complete	☐	Assigned dynamically
Edit Del Deactivate	Canceled	Canceled	Canceled	☐	Assigned dynamically
Edit Del Deactivate	Accepted	Accepted	In Progress	☐	Assigned dynamically
Edit Del Deactivate	Rejected	Rejected	New	☐	Assigned dynamically

Inactive Values

No Inactive Values values defined.

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Service Appointment Status Values

1. From Setup, click **Object Manager** and select **Service Appointment**.
2. Click **Fields & Relationships** and then click **Status** field.
3. In the Status Picklist Values section, click **New**.
4. Add **Status Picklist Values** as shown in the following table.
5. Ensure to select the Service Appointment record type(s) accordingly.
6. Verify if Open status exists. If Open status does not exist, add Open or rename None to Open if None is not used in your current workflows.
7. Ensure to reorder the Statuses so that they are presented to users in a logical order for ease of use.

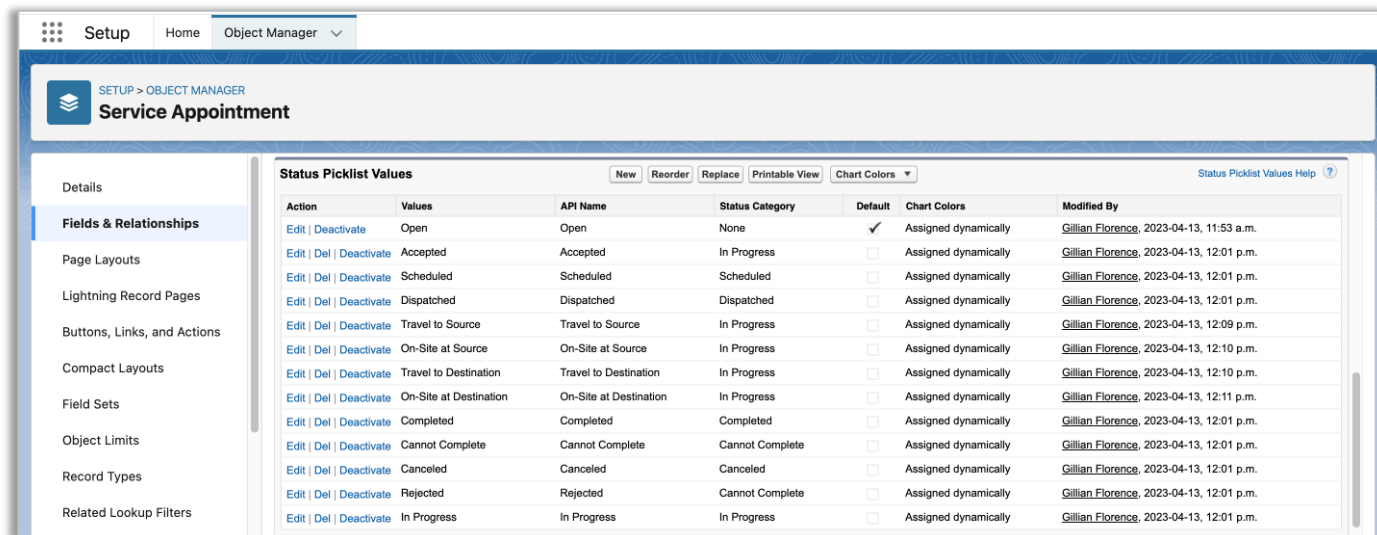
NOTE

- The status values and the order that you set will be presented to Drivers when they tap **Update Work Status** from Actions in the Field Service Mobile App. It is recommended to order the statuses to match the status transitions for efficiency and usability.
- Upon initial status value creation, you must use the Label and API Name as provided. Later, you may edit the status Label to something else that suits your organizations workflow, but the API Name MUST maintain as indicated. These API names are used in the provided Update Work Status Flow.

Label	API Name	Status Category	Default
Open	Open	None	Checked
Accepted	Accepted	In Progress	Unchecked
Rejected	Rejected	Cannot Complete	Unchecked
Travel to Source	Travel to Source	In Progress	Unchecked
On-Site at Source	On-Site at Source	In Progress	Unchecked
Travel to Destination	Travel to Destination	In Progress	Unchecked
On-Site at Destination	On-Site at Destination	In Progress	Unchecked

Review the Status Picklist Values.

If no other customization for Status has been configured since your initial SFS installation, the Status Picklist Values for Service Appointment will be as shown in the following image.



The screenshot shows the 'Service Appointment' configuration page under 'Object Manager'. The 'Status Picklist Values' table is displayed with the following data:

Action	Values	API Name	Status Category	Default	Chart Colors	Modified By
Edit Del Deactivate	Open	Open	None	☒	Assigned dynamically	Gillian Florence, 2023-04-13, 11:53 a.m.
Edit Del Deactivate	Accepted	Accepted	In Progress	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:01 p.m.
Edit Del Deactivate	Scheduled	Scheduled	Scheduled	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:01 p.m.
Edit Del Deactivate	Dispatched	Dispatched	Dispatched	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:01 p.m.
Edit Del Deactivate	Travel to Source	Travel to Source	In Progress	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:09 p.m.
Edit Del Deactivate	On-Site at Source	On-Site at Source	In Progress	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:10 p.m.
Edit Del Deactivate	Travel to Destination	Travel to Destination	In Progress	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:10 p.m.
Edit Del Deactivate	On-Site at Destination	On-Site at Destination	In Progress	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:11 p.m.
Edit Del Deactivate	Completed	Completed	Completed	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:01 p.m.
Edit Del Deactivate	Cannot Complete	Cannot Complete	Cannot Complete	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:01 p.m.
Edit Del Deactivate	Canceled	Canceled	Canceled	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:01 p.m.
Edit Del Deactivate	Rejected	Rejected	Cannot Complete	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:01 p.m.
Edit Del Deactivate	In Progress	In Progress	In Progress	☐	Assigned dynamically	Gillian Florence, 2023-04-13, 12:01 p.m.

The Service Appointment status values that you add will be shown to the Driver when accessing the Update Work Status action in the Field Service Mobile App.

The Update Work Status flow is used by Drivers to update the Service Appointment status as they transition through the lifecycle of the Service Appointment. The Service Appointment record is automatically updated on each status change as well as related field values - as long as the Status Transition is permitted - ensure to [configure the appropriate Status Transitions](#) in Field Service Settings in Field Service Admin to support your Service Appointment lifecycle.

Set Field-Level Security

The Material Transport App includes several custom fields for Work Order. You must set field-level security to Visible on **Units Accepted**, **No. of Transfer**, and **Units in each Transfer** for the profile assigned to Vendor/Dispatchers to ensure they can edit these fields.

First, set field-level security for **Units Accepted**.

1. From Setup, click **Object Manager** and select **Work Order**.
2. Click **Fields & Relationships** and click **Units Accepted**.
3. Click **Set Field-Level Security**.
4. Locate the profile assigned to your Vendor/Dispatchers and enable the checkbox in the Visible column.
5. Click **Save**.

Next, set field-level security for **No. of Transfer**.

1. From Fields & Relationships, click **No. of Transfer**.
2. Click **Set Field-Level Security**.
3. Locate the profile assigned to your Vendor/Dispatchers and then enable the checkbox in the Visible column.
4. Click **Save**.

Finally, set field-level security for **Units in each Transfer**.

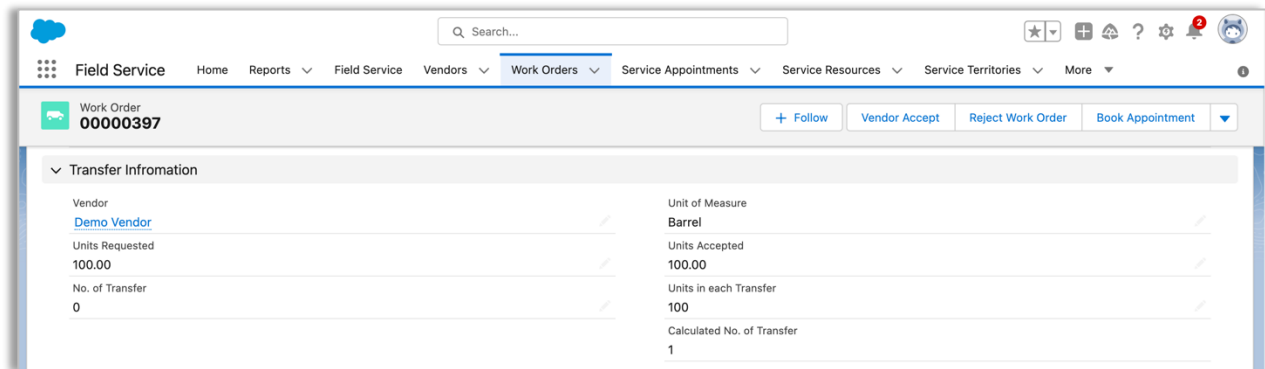
1. From Fields & Relationships, click **Units in each Transfer**.
2. Click **Set Field-Level Security**.
3. Locate the profile assigned to your Vendor/Dispatchers and then enable the checkbox in the Visible column.
4. Click **Save**.

Configure and Assign Page Layouts

The page layouts for Work Order, Service Appointment, and Location object are provided with the installation. These page layouts include custom fields and need to be configured and customized to suit your needs. Once modified, the page layouts must be assigned to the appropriate profiles. Associated record types are also included.

Work Order Page Layout

The **Material Transport Layout** page layout for Work Order is included with the Material Transport App. This page layout and the corresponding Work Order Lightning Record page needs to be configured and customized for your needs and then assigned to the profile used by Vendor-Dispatcher users.



Field Service Home Reports Field Service Vendors Work Orders Service Appointments Service Resources Service Territories More

Work Order 00000397 + Follow Vendor Accept Reject Work Order Book Appointment

Transfer Information

Vendor	Demo Vendor	Unit of Measure	Barrel
Units Requested	100.00	Units Accepted	100.00
No. of Transfer	0	Units in each Transfer	100
		Calculated No. of Transfer	1

The provided **Material Transport Layout** page layout includes the **Pickup Location** field as well as the **Transfer Information** section with the following fields:

- Vendor
- Units Accepted
- Units Requested
- Units in each Transfer
- Calculated No. of Transfer
- Unit of Measure
- No. of Transfer*

Setup Home Object Manager

SETUP > OBJECT MANAGER
Work Order

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List View Button Layout

Triggers

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

Section	Address	Business Hours	Created By	Duration	Entitlement Proce...	InJeopardy	Is Linked To Serv
Blank Space	Asset	Calculated No. of...	Created Date	Duration Type	Entitlement Proce...	Is Closed	Is New Work Ord
Account	Asset Warranty	Case	Description	End Date	Generated from ma...	Is Fill In Candidate	Last Modified By
Actual Truckloads	Assigned Date	Contact	Discount	Entitlement	Grand Total	Is Linked To Main...	Last Modified Dat

Information

Work Order Number	GEN-2004-001234	Owner	Sample Text
Work Type	Sample Text	Service Territory	Sample Text
Status	Sample Text	Pickup Location	Sample Text
Parent Work Order	Sample Text	Scheduling Priority	72,177
Start Date	2023-04-11, 7:21 p.m.	End Date	2023-04-11, 7:21 p.m.
InJeopardy	✓	Duration	425.64
Is New Work Order	✓	Priority	Sample Text
Rejection Reason	Sample Text	Contact	Sample Text

Description

Subject	Sample Text
Description	Sample Text
Pickup Location Direction	Sample Text
Notes	

Setup Home Object Manager

SETUP > OBJECT MANAGER
Work Order

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Related Lookup Filters

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

Section	Address	Business Hours	Created By	Duration	Entitlement Proce...	InJeopardy	Is Linked To Serv
Blank Space	Asset	Calculated No. of...	Created Date	Duration Type	Entitlement Proce...	Is Closed	Is New Work Ord
Account	Asset Warranty	Case	Description	End Date	Generated from ma...	Is Fill In Candidate	Last Modified By
Actual Truckloads	Assigned Date	Contact	Discount	Entitlement	Grand Total	Is Linked To Main...	Last Modified Dat

Address

Address Suite 300, The Landmark @ One Market
San Francisco CA 94105
US

Transfer Information

Account	Sample Text	Unit of Measure	Sample Text
Units Requested	123.99	Units Accepted	569.81
No. of Transfer	48,958	Units in each Transfer	52,170
		Calculated No. of Transfer	57,731

*The **No. of Transfer** field is provided for cases when a 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 the 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. If this capability is not needed, then ensure to remove the No. of Transfer field from the page layout.

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

First, customize **Material Transport Layout** page layout to your organization's needs and then assign to the profile assigned to Vendor-Dispatcher.

1. From Setup, click **Object Manager** and select **Work Order**.
2. Click **Page Layouts**.
3. From the Page Layouts list, click **Page Layout Assignment**.
4. Click **Edit Assignment**.
5. Select the profiles assigned to Vendor-Dispatchers.
6. In the Page Layout To Use dropdown, select **Material Transport Layout**.
7. Click **Save**.

Service Appointment Page Layout

The **Material Transport Layout** page layout for Service Appointment is provided with the Material Transport App. This page layout is configured with the following fields included in the **General Information** section:

- Units Picked Up
- Field Ticket
- Begin Tank Lvl
- End Tank Lvl
- Pickup Location
- Wait Time
- Units Disposed
- Disposal Ticket
- Drop Location
- Wait Time at Drop

The Transfer Information section is also included with the following fields:

- Account (Vendor)
- Units Accepted
- Units Requested
- Units in Transfer

First, customize **Material Transport Layout** page layout to your organization's needs and then assign the **Material Transport Layout** page layout to the profiles assigned to Vendor/Dispatcher and Drivers.

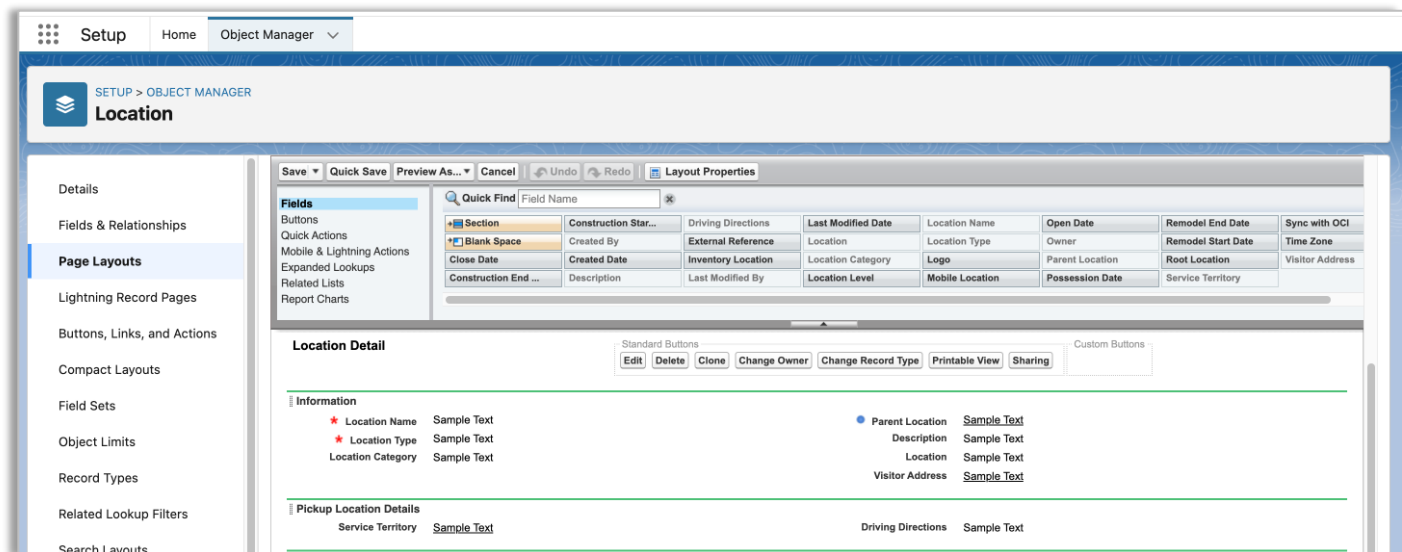
1. From Setup, click **Object Manager** and select **Service Appointment**.
2. Click **Page Layouts**.
3. From the Page Layouts list, click **Page Layout Assignment**.
4. Click **Edit Assignment**.
5. Select the profiles assigned to Vendor-Dispatchers and Drivers.
6. In Page Layout To Use dropdown, select **Material Transport Layout**.
7. Click **Save**.

Location Page Layout

The **Material Transport Layout** page layout for Location object is provided with the Material Transport App. This page layout is configured with the **Location Category** custom picklist field and **Address** field (Lookup to VisitorAddressId).

The **Pickup Location Details** section is also included in the page layout, configured with **Service Territory** and **Driving Directions** fields.

The **Material Transport Layout** page layout must be assigned to user profiles that will be creating Location records, or alternatively, you can modify your existing Location page layout and add the **Location Category** field and the **Address** field, as well as create a Pickup Location Details section with **Service Territory** and **Driving Directions** fields to your own Location page layout.



The screenshot shows the Salesforce Setup interface for the **Location** object. The left sidebar contains navigation options: Details, Fields & Relationships, **Page Layouts** (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

The main content area displays the **Location** object page layout configuration. At the top, there are tabs for **Save**, **Quick Save**, **Preview As...**, **Cancel**, **Undo**, **Redo**, and **Layout Properties**. Below these is a **Fields** section with a search bar and a list of fields including: Section, Blank Space, Construction Start Date, Created By, Close Date, Created Date, Construction End Date, Driving Directions, External Reference, Inventory Location, Last Modified By, Last Modified Date, Location, Location Category, Location Level, Location Name, Location Type, Logo, Mobile Location, Open Date, Owner, Parent Location, Possession Date, Remodel End Date, Remodel Start Date, Service Territory, Sync with OCI, Time Zone, and Visitor Address.

The **Location Detail** section is visible, showing standard buttons (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing) and custom buttons. Below this, the **Information** section displays fields like Location Name, Location Type, Location Category, Parent Location, Description, Location, Visitor Address, and Service Territory, each with a sample text value.

The **Pickup Location Details** section is also visible, showing fields like Service Territory and Driving Directions, each with a sample text value.

Configure Work Order Lightning Record Page

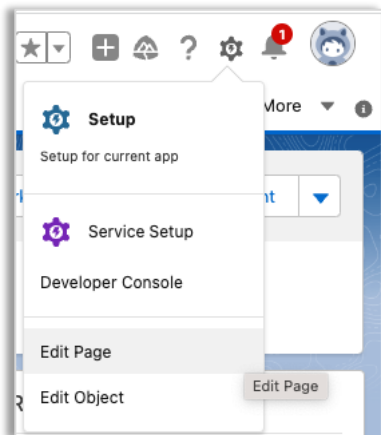
The **Vendor Accept** action (type: Flow) and **Reject Work Order** action (type: update record) are provided with the Material Transport App. These actions need to be added and configured in the highlights panel on the Work Order lightning record page.

Before adding the actions in the highlights panel, ensure that the Work Order page is upgraded to use dynamic actions.

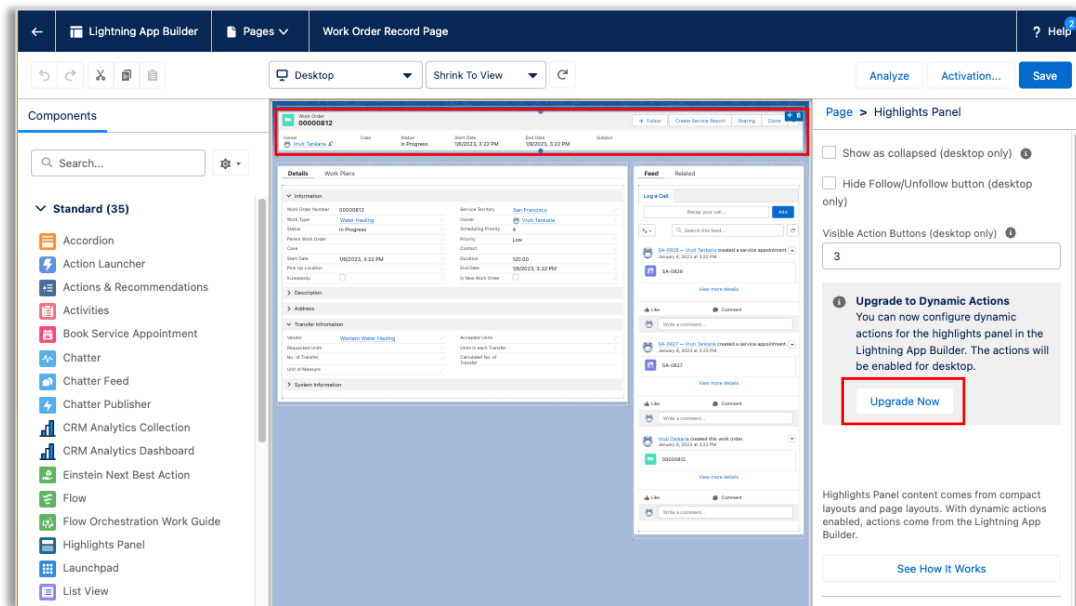
NOTE: If the Upgrade to Dynamic Actions information box displays when the highlights panel is selected, then you need to complete the upgrade. If the information box does not display, then the page is already upgraded.

To edit the default Work Order record page in Lightning App Builder.

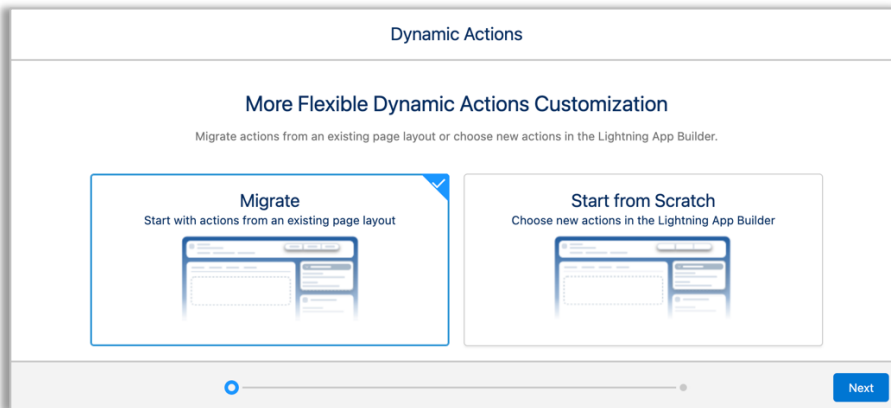
1. Open an existing Work Order.
2. From the Work Order record page, click the gear icon and select **Edit Page**.



3. Click the highlights panel, if the Dynamic Actions information box displays, click **Upgrade Now**.



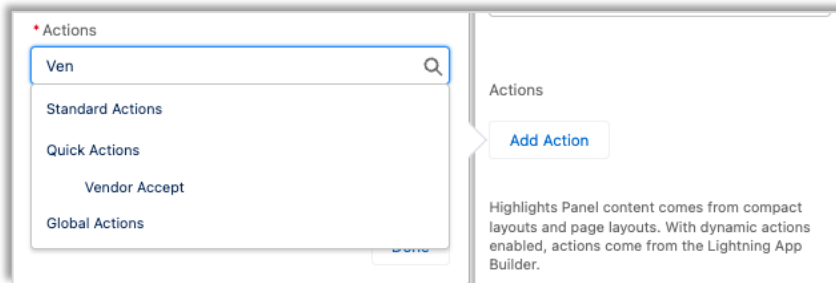
4. Select **Migrate** and then click **Next**.



5. Select **Material Transport Layout** page layout as the source for dynamic actions.

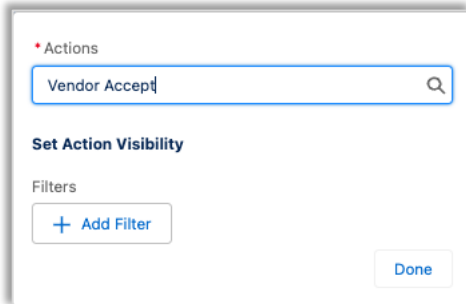
Next, add the **Vendor Accept** quick action and configure its visibility to ensure that the action only displays for Work Orders with Status = New AND IsMaterialTransport = True.

1. From the Highlights Panel configuration pane, click **Add Action** and then search and select **Vendor Accept**.



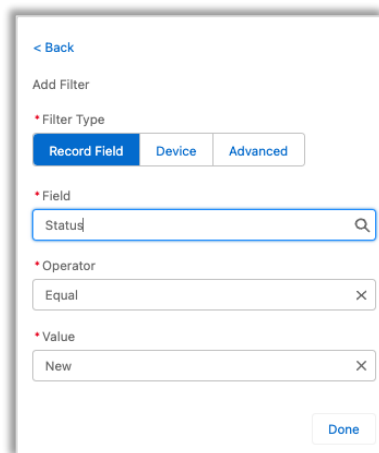
The screenshot shows the 'Highlights Panel configuration pane'. On the left, there's a search bar with 'Ven' entered. Below it, a list of actions is shown: 'Standard Actions', 'Quick Actions', 'Vendor Accept', and 'Global Actions'. On the right, there's a button labeled 'Add Action' and a text box that says 'Highlights Panel content comes from compact layouts and page layouts. With dynamic actions enabled, actions come from the Lightning App Builder.'

2. Under Set Action Visibility, click **Add Filter**.



The screenshot shows the 'Set Action Visibility' configuration pane. At the top, there's a search bar with 'Vendor Accept' entered. Below it, there's a section labeled 'Set Action Visibility' with a button labeled '+ Add Filter'. At the bottom right, there's a 'Done' button.

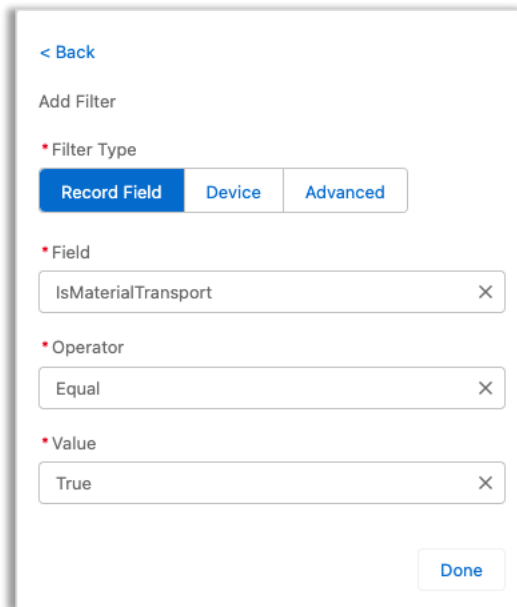
3. Configure the following details.
 - a. **Filter Type:** Record Field
 - b. **Field:** Status
 - c. **Operator:** Equal
 - d. **Value:** New



The screenshot shows the 'Add Filter' configuration pane. At the top, there's a '< Back' button. Below it, there's a section labeled 'Add Filter'. Under 'Filter Type', there are three buttons: 'Record Field' (selected), 'Device', and 'Advanced'. Under 'Field', there's a search bar with 'Status' entered. Under 'Operator', there's a dropdown menu with 'Equal' selected. Under 'Value', there's a search bar with 'New' entered. At the bottom right, there's a 'Done' button.

4. Click **Done**.
5. Click **Add Filter** and configure the following details:

- a. **Filter Type:** Record Field
- b. **Field:** IsMaterialTransport
- c. **Operator:** Equal
- d. **Value:** True



< Back

Add Filter

* Filter Type

Record Field Device Advanced

* Field

IsMaterialTransport X

* Operator

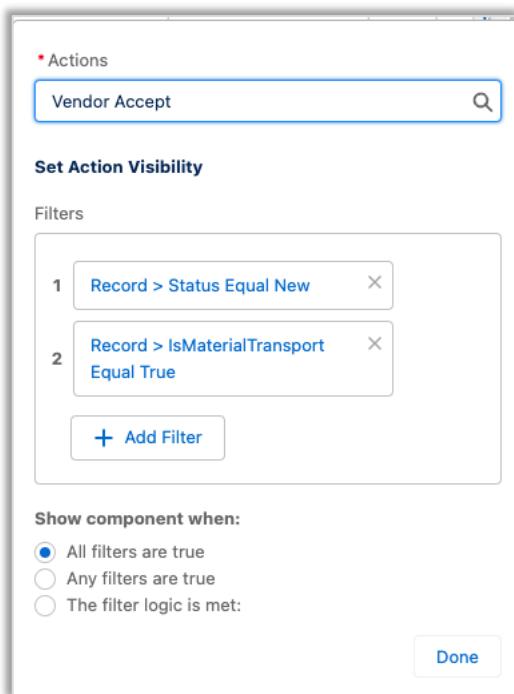
Equal X

* Value

True X

Done

6. Click **Done**, review settings and click **Done** to save.



* Actions

Vendor Accept

Set Action Visibility

Filters

1 Record > Status Equal New X

2 Record > IsMaterialTransport Equal True X

+ Add Filter

Show component when:

☒ All filters are true

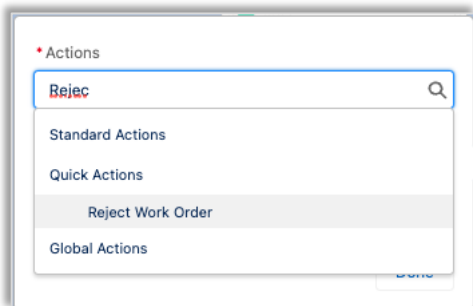
☐ Any filters are true

☐ The filter logic is met:

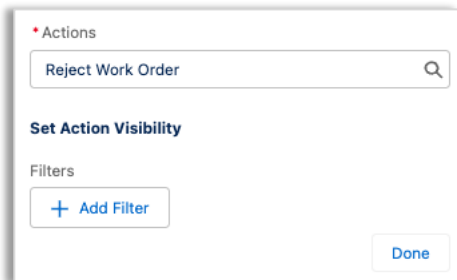
Done

Next, add the **Reject Work Order** quick action and set its visibility for Work Orders with Status = New.

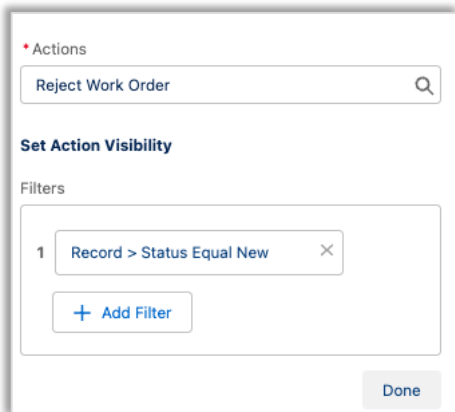
1. From the highlights panel configuration pane, click **Add Action** and then search and select **Reject Work Order**.



2. Under Set Action Visibility, click **Add Filter**.



3. Configure the following details.
 - a. **Filter Type:** Record Field
 - b. **Field:** Status
 - c. **Operator:** Equal
 - d. **Value:** New
4. Click **Done**, review settings and click **Done**.



5. Continue to add and remove desired actions to the Work Order lightning record page.
6. Add and arrange lightning page components and customize the lightning record page to suit your organization's needs.

7. Activate the record page for the desired assignment level (org default, App default, or App, record type, and profile)

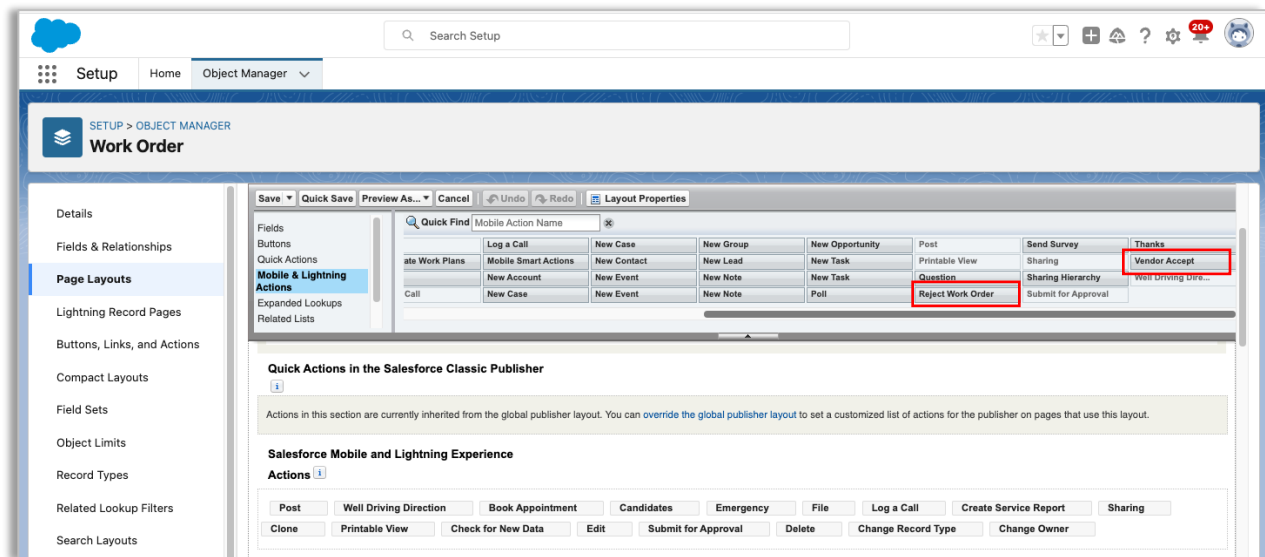
NOTE: If you have Feed Tracking enabled for Work Order, you must ensure that these custom action buttons are not added to the page layout. There is a known issue with Feed Tracking and custom quick actions, where If these actions are added to the page layout from the palette, the actions appear in Feed on the record page. These actions must only be added using Lightning App Builder with dynamic actions enabled (as instructed above).

Refer to Salesforce issue: <https://salesforce.stackexchange.com/questions/231633/why-are-lightning-actions-for-case-object-showing-in-feed>

Ensure that the custom quick actions are removed from the Work Order page layout.

1. From Setup, click **Object Manager**, and select **Work Order**.
2. Click **Page Layouts**.
3. Open Material Transport Layout page layout.
4. From the page layout palette, click **Mobile & Lightning Actions**.
5. Verify that the Vendor Accept and Reject Work Order quick actions are in the palette and NOT added to Salesforce Mobile and Lightning Experience Actions area.

If these custom quick actions are found in the Salesforce Mobile and Lightning Experience Actions area, they must be moved back to the palette.

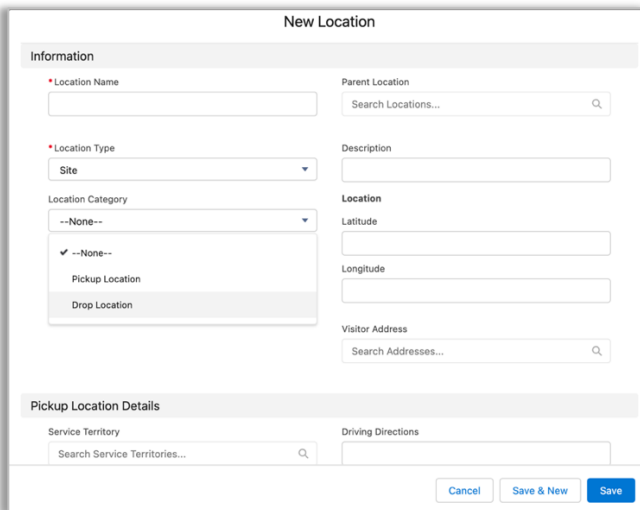


Create Location Records

With the Material Transport App installed, you can create Location records that include a Location Category. The Location Category field allows you to create a Location record as either Pickup Location or Drop Location along with the Location Type.

1. Open the Locations tab and click **New**.
2. Enter a Location Name.
3. In **Location Category**, select Pickup Location or Drop Location.
4. Select a Location Type.
5. Enter Latitude and Longitude for location or use the Address field to add location details.

NOTE: If adding a new address, you must first save the new Location record, then return to the record and select the record as the Parent Location when adding/creating the new address.



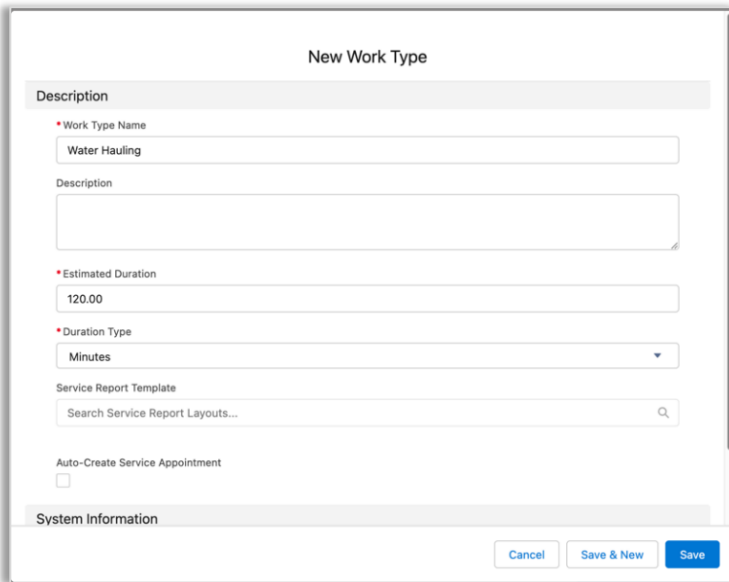
NOTE: If Pickup Location is selected as Location Category, a Service Territory value is required. If Drop Location is selected as a Location Category, then Service Territory must be empty.

Create Work Type Records

Create relevant Work Types for your organization's material transport uses. A Work Type is selected when a material transfer request (Work Order) is created.

1. From App Launcher, find and open **Work Types**.
2. From the Work Types list page, click **New**.
3. Enter field details according to your organization's needs.
 - a. Work Type Name.
 - b. Estimated Duration.
 - c. Duration Type.
4. Ensure that **Auto-Create Service Appointment** is unchecked and click **Save**.

NOTE: If this option is checked, an extra Service Appointment will be created when a vendor accepts a work order. Automation for Service Appointment creation when setting work order status to Accepted and filling in fields is provided with the Material Transport App.



New Work Type

Description

• Work Type Name
Water Hauling

Description

• Estimated Duration
120.00

• Duration Type
Minutes

Service Report Template
Search Service Report Layouts...

Auto-Create Service Appointment
☐

System Information

Cancel Save & New Save

Create Work Order Record Types

The Material Transport App includes a Work Order record type labeled Material Transport as well as a Service Appointment record type labeled Material Transport.

In cases where you need to support additional or different work order record types and page layouts for either material transport purposes or non-material transport purposes, you must configure each record type with the IsMaterialTransport picklist field to either True or False as a default according to the use case.

If the Work Order is for material transport use, the default is set to True so that whenever a Work Order is created with that record type, the record is automatically flagged as a Material Transport work order.

NOTE: We recommend setting the field level security on the IsMaterialTransport field to read-only or not visible for most profiles so that users cannot edit the picklist value in a record. Also, we recommend to not display the field on page layouts.

Create Record Type for Material Transport Purposes

Create and configure a Work Order record type for material transport purposes.

1. From Setup, click **Object Manager** and select **Work Order**.
2. Click **Record Types**.
3. From the Record Types list, click **New**.
4. Enter details:
 - a. Select an existing record type.
 - b. Record Type Label.
 - c. Record Type Name.
 - d. Description.
5. Select the profiles to make the record type available for and click **Next**.
6. Assign page layouts for profiles and click **Save**.
7. From the **Picklists Available for Editing** section, click **Edit** next to the IsMaterialTransport field.

Picklists Available for Editing	
Action	Field
Edit	IsMaterialTransport
Edit	Priority
Edit	Status
Edit	Unit of Measure

8. Set Default to **True**.

Record Type Edit
IsMaterialTransport

General Properties

Field Label	IsMaterialTransport
Record Type	Material Transport

Picklist Values

Select an item from the Available Values list and add it to the Selected Values list to include it as a picklist value for this Record Type. Note that removing an item from the picklist does not remove it from any existing records. Finally, select a default picklist value for this Record Type.

Available Values

Selected Values

--None--

False
True

Add

Remove

Default

True

Save Cancel

Create Record Type for Non-Material Transport Purposes

Create and configure a Work Order record type for non-material transport purposes.

1. From Setup, click **Object Manager** and select **Work Order**.
2. Click **Record Types**.
3. From the Record Types list, click **New**.
4. Enter details:
 - a. Select an existing record type.
 - b. Record Type Label.
 - c. Record Type Name.
 - d. Description.
5. Select the profiles to make the record type available for and click **Next**.
6. Assign page layouts for profiles and click **Save**.
7. From the **Picklists Available for Editing** section, click **Edit** for the IsMaterialTransport field.

Picklists Available for Editing	
Action	Field
Edit	IsMaterialTransport
Edit	Priority
Edit	Status
Edit	Unit of Measure

8. Set Default to **False**.

Record Type Edit
IsMaterialTransport

General Properties	
Field Label	IsMaterialTransport
Record Type	Non Material Transport Work Order

Picklist Values

Select an item from the Available Values list and add it to the Selected Values list to include it as a picklist value for this Record Type. Note that removing an item from the picklist does not remove it from any existing records. Finally, select a default picklist value for this Record Type.

Available Values		Selected Values
--None--		False
	Add	True
	Remove	

Default: False

Save Cancel

Information for Specific Use Cases

This section provides information for setup and considerations for the following use cases and scenarios that may need to be supported in your org:

- User only needs to create Work Orders and Service Appointments for material transport purposes.
- User only needs to create Work Orders and Service Appointments for non-material transport purposes.
- User needs to be able to create Work Orders and Service Appointments for both material transport and non-material transport purposes.

User only needs to create Work Orders and Service Appointments for material transport purposes

For users within your organization that will be creating Field Service Work Orders and Service Appointments for material transport purposes only, review the information below to configure your org for this scenario.

Setup:

- Only -Master- (OOTB field service) and Material Transport (from package install) are available to assign to user profiles, or other custom Work Order record types are created, depending on your scenario.
- Assign only the Material Transport Work Order record type to the profile of the user that will create Work Orders using the **Create Transfer Request** global quick action.

NOTE: Without any other record types created, this means they cannot have -Master- assigned and therefore, cannot create other Work Order record types. The Material Transport record type is the only assigned record type and is the default.

- Assign the Material Transport Service Appointment record type to the profile of user that will be accepting the Work Order and generating Service Appointments using the Vendor Accept quick action.

NOTE: The profile of the user that will be reviewing material transport work orders and actioning on Vendor Accept to auto-generate the Service Appointments can have any Service Appointment record type assigned and set as their default. The **Set Service Appointment Record Type** flow is provided to ensure that the Service Appointments generated use the Material Transport record type and associated page layout.

Considerations:

- A Work Order that is created using the Create Transfer Request global quick action will always be Material Transport record type.
- A Work Order that is created from the list view (New button) will always be a Material Transport record type.
- A Service Appointment that is created from the Vendor Accept quick action will always be a Material Transport record type.
- A Service Appointment that is created from the related list of the Work Order will always be a Material Transport record type.

User only needs to create Work Orders and Service Appointments for non-material transport purposes

For users within your organization that will be creating Field Service Work Orders and Service Appointments for non-material transport purposes only, review the information below to configure your org for this scenario.

Setup:

- Only -Master- (OOTB field service) and Material Transport (from package install) are available, or other custom Work Order record types are created depending on your scenario.
- Assign the -Master- record type for Work Order and Service Appointment. (Or other custom record type) to the user's profile.

NOTE: If -Master- is assigned, without any other record types created, the profile cannot have Material Transport assigned and therefore, cannot create Material Transport Work Order record types.

- Ensure that Material Transport record type is not assigned to the profile.

- Assign the FSL Work Order Layout and FSL Service Appointment Layout page layout to the - Master- record type. (Or another custom page layout)

Considerations:

- Users creating non-material transport Work Orders, can continue to do so with the OOTB - Master- Work Order record type (or other custom record type) assigned to their profile as the default, and create work orders using the New action from the Work Order list view.
- If Material Transport record type is not assigned to a profile, users with that profile will not see the Create Transfer Request global quick action, even if the global quick action is assigned to their profile.
- All Work Orders are created with IsMaterialTransport = False, therefore any triggers, code, automations, and flows provided with the Material Transport package should not impact these Work Orders and Service Appointments.

User needs to create Work Orders and Service Appointments for both material transport and non-material transport purposes

For users within your organization that will be creating material transport work orders, as well as other field service work orders for non-material transport purposes, review the information below to configure your org for this scenario.

Setup:

- Create a “non-material transport” (label with preferred name) record type for Work Order, configuring the IsMaterialTransport picklist default value to False.
- Create a “non-material transport” (label with preferred name) record type for Service Appointment.
- Assign the Material Transport Work Order record type (provided with Material Transport App install) and the new, custom “non-material transport” work order record type to the profile(s) that will be creating these Work Orders and Service Appointments.

NOTE: This means that -Master- record type can no longer be assigned.

- Assign the Material Transport Service Appointment record type (provided with app package) and the new, custom “non-material transport” Service Appointment record type to the profile(s) that will be creating these Service Appointments.

NOTE: This means that -Master- can no longer be assigned/used.

- Assign the FSL Work Order page layout or any other page layout to your custom non-material transport record type for the profile(s).

- Assign the FSL Service Appointment page layout or any other page layout to your custom non-material transport record type for the profile(s).

Considerations:

- Creating a Work Order using the Create Transfer Request global quick action will always create a Work Order as Material Transport record type and use the Material Transport Layout page layout.
- Creating a Service Appointment from a Work Order that has IsMaterialTransport = True, will always create a Service Appointment that is the Material Transport record type.

NOTE: The flow, **Set Service Appointment Record Type** is provided to handle this scenario and to ensure that if the parent Work Order has IsMaterialTransport = True, then the child Service Appointment record type is set to Material Transport, not matter what the default is set to for the profile. If you want to create additional Material Transport record types (IsMaterialTransport = True), for Work Orders and corresponding Service Appointments, then this flow can be copied and modified to support your business processes.

Configure for Field Service Mobile App

Before your mobile users can access and use the Field Service Mobile App effectively, ensure that the **Field Service Connected App** is installed in your org.

The Field Service Connected App is different from the actual Field Service mobile App, but equally important. The connected app provides push notifications, geolocation services, and other app settings related to service report generation and app customization.

Refer to Salesforce help document: [Download the Field Service Connected App.](#)

To setup for Field Service Mobile App use, the following tasks must be completed:

- Add the **Update Work Status** flow as an App Extension.
- Add the **Diab Capture Image** flow as an App Extension
- Enable '**Run Flows**' user permission for profiles assigned to Drivers/Technicians.
- Ensure Notifications are enabled.

NOTE: Even with notifications enabled, a service resource will NOT receive push notifications for Service Appointments if the Field Service Connected App is not installed in your org.

Connect Update Work Status Flow to Field Service Mobile App

The **Update Work Status** flow is included with the Material Transport App. This flow is a Field Service Mobile template flow and is used by Drivers to update the Service Appointment status as they transition through the lifecycle of the service appointment. The Service Appointment record is updated on each status change as well as related field updates.

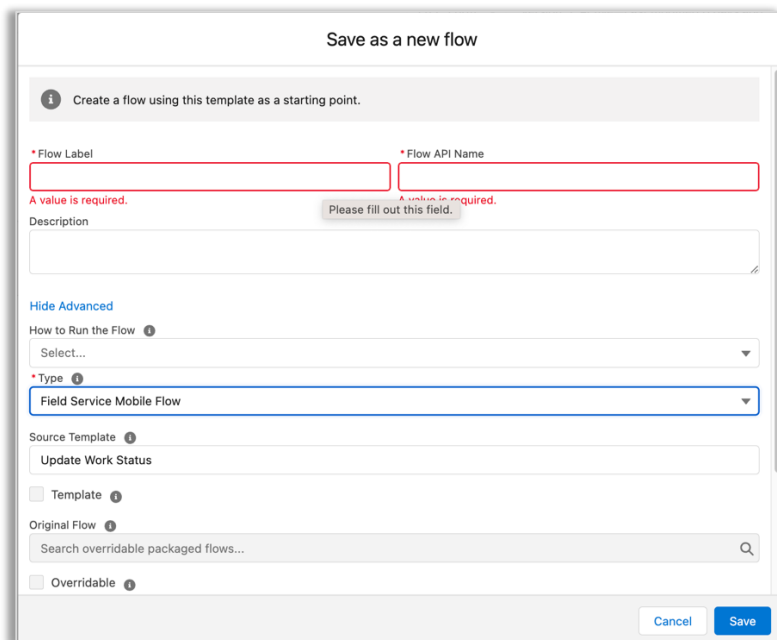
A default outcome path is also included to support any service appointment statuses that you add and use in your service appointment lifecycle. If the value is added to the status field and the Status Transition is configured, then the Driver can see and select the value. The Service Appointment record will be updated with the selected status.

No other actions are configured for this Default Outcome path. If additional actions or paths are required to support your business processes, such as sending notifications or field updates, the copied version of the Update Work Status flow can be modified to suit your needs.

The **Update Work Status** flow must be added as an App Extension to the Field Service Mobile App.

First, create a copy of the provided flow template. The copied flow is then connected to the app as an App Extension.

1. From Setup, enter flows in the Quick Find box, then select **Flows**.
2. In the All Flows list, click **Update Work Status** to open the flow in Flow Builder.
3. From Flow Builder, click **Save As**.
4. Enter a Flow Label and Flow API Name. e.g., Update Work Status Copy

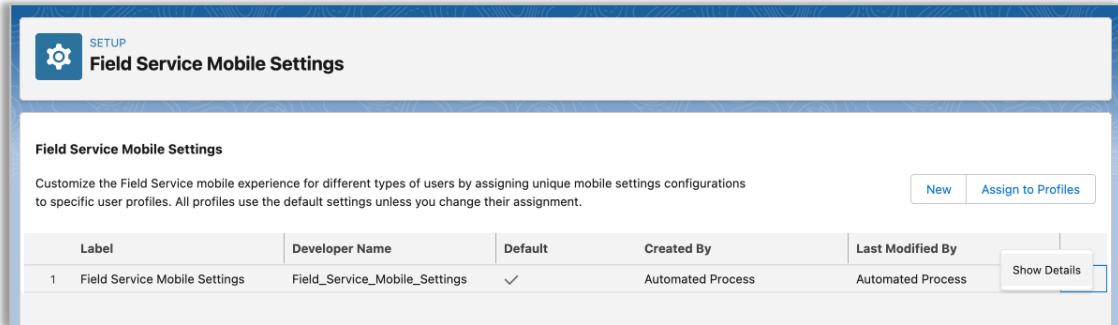


5. Click **Save**.
6. In Flow Builder, ensure to click **Save** and then **Activate**.

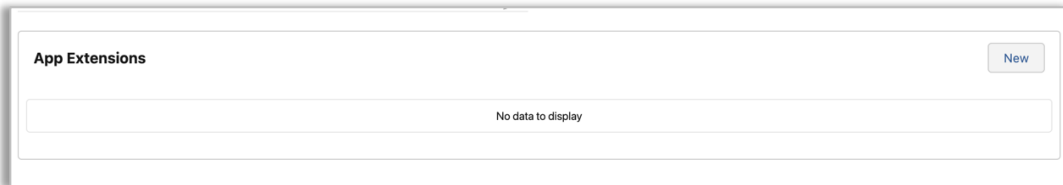
Next, create the App Extension that connects the flow to the Field Service Mobile App.

1. From Setup, enter field service mobile settings in the Quick Find box, then select **Field Service Mobile Settings**.

2. From the Field Service Mobile Settings list, next to the mobile settings configuration that you want to create an app extension for, click the arrow and select **Show Details**.



3. In the App Extensions section (scroll to bottom of page), click **New**.



4. In the New App Extension dialog, fill in the details:
 - a. **Label:** *Enter a preferred label*
NOTE: This label will display to users in the Field Service Mobile App in Actions list for the Drivers to update the work status. Ensure that the label is user-friendly and suits your business processes.
 - b. **Type:** select Flow
 - c. **Name:** enter an API name for the app extension.
 - d. **Launch Value:** the API name of the copied flow.
 - e. **Scoped to Object Types:** ServiceAppointment (must be Service Appointment API name).
 - f. **Installation URL:** *leave blank*.

Edit App Extension

Information

* Field Service Mobile Settings

Field Service Mobile Settings

* Label

Update Work Status

* Type

Flow ▼

* Name

Update_Work_Status_Copy

* Launch Value

Update_Work_Status_Copy

Scoped To Object Types

ServiceAppointment

Installation URL

Cancel

Save

NOTE: Only the user profiles assigned to the mobile settings configuration you select will have access to this flow. To manage user profile assignments, click **Manage Assignments** on the Field Service Mobile Settings page.

Enable 'Run Flows' User Permission

For Drivers to be able to run the Update Work Status flow from the Field Service Mobile App, ensure that the **Run Flows** permission is enabled for the profile.

1. From Setup, enter Profiles in the Quick Find box and then select **Profiles**.
2. From the Profiles list, locate the driver's profile and click **Edit**.
3. Under General User Permissions, enable **Run Flows**.
4. Save changes.

Configure Notifications for Service Appointments to Service Resource Users

Ensure that the following options are enabled in Field Service Settings from Setup:

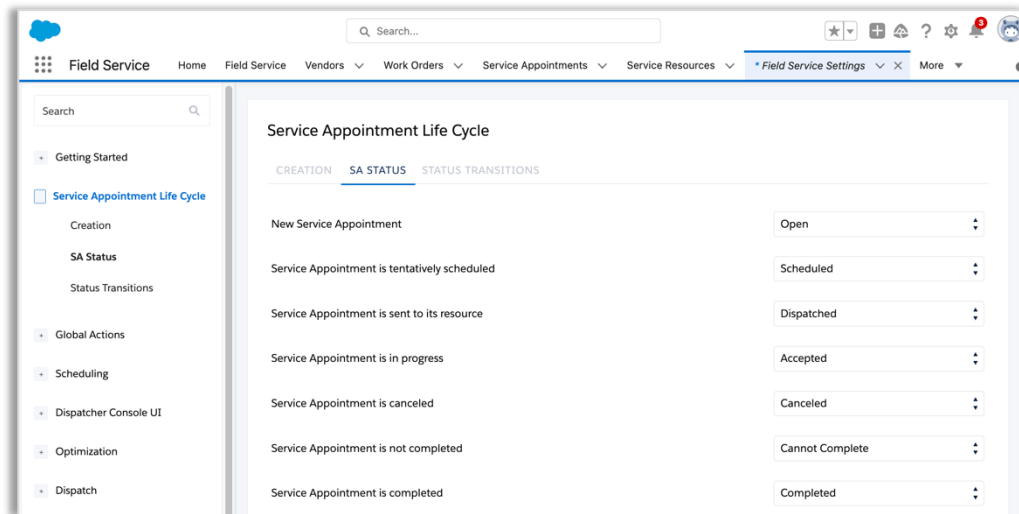
- Under Notifications:
 - Enable notifications.
- Under Sharing:
 - **Send appointment notifications on assignment** - If selected, users are notified when they're assigned to a service appointment and when their assignment is changed or removed. They're not notified when they're dispatched for the appointment.
 - **Send appointment notifications on dispatch** - If selected, users are notified when they're dispatched for a service appointment and when their assignment is changed or removed.

Configure Status Transitions

The Service Appointment Status Transitions must be configured in Field Service Settings to customize your service appointment life cycle.

NOTE: The Service Appointment statuses that are displayed is the API name and not the label.

1. From the App Launcher, find and open the **Field Service Admin** app, and then click the **Field Service Settings** tab.
2. Click **Service Appointment Life Cycle**.
3. Click **SA Status**. Select a status value for each description and save changes.



4. Click the **Status Transitions** tab.
5. Each row represents a flow or transition in the service appointment life cycle. Configure the Status Transitions as shown in the Transitions to Add table below.
6. Optionally, click **More Details** to limit the user profiles that can make each status change.
7. Click **Save**.

Transitions to Add

FROM	TO
Open	Scheduled
Open	Canceled
Scheduled	Dispatched
Scheduled	Open
Dispatched	Accepted
Dispatched	Open

Dispatched	Rejected
*Rejected	Open
Dispatched	Canceled
Accepted	Travel to Source
Accepted	Cannot Complete
Travel to Source	On-Site at Source
Travel to Source	Cannot Complete
On-Site at Source	Travel to Destination
On-Site at Source	Cannot Complete
Travel to Destination	On-Site at Destination
Travel to Destination	Cannot Complete
On-Site at Destination	Completed
On-Site at Destination	Cannot Complete

*NOTE: Ensure that from Rejected to Open transition is added. This transition must be permitted to support automation included with the **Notification-Driver Reject SA** autolaunched flow.

This flow is triggered when a Driver on mobile, via the Update Work Status action, updates a Service Appointment to Rejected. The flow sends a notification to the Vendor-Dispatcher and changes the Service Appointment status to Open. If the Rejected to Open status transition is not configured, when the Driver selects Rejected, the update will fail, and an upload error will display on the mobile app.

Search

Getting Started

Service Appointment Life Cycle

Creation

SA Status

Status Transitions

Global Actions

Scheduling

Dispatcher Console UI

Optimization

Dispatch

Sharing

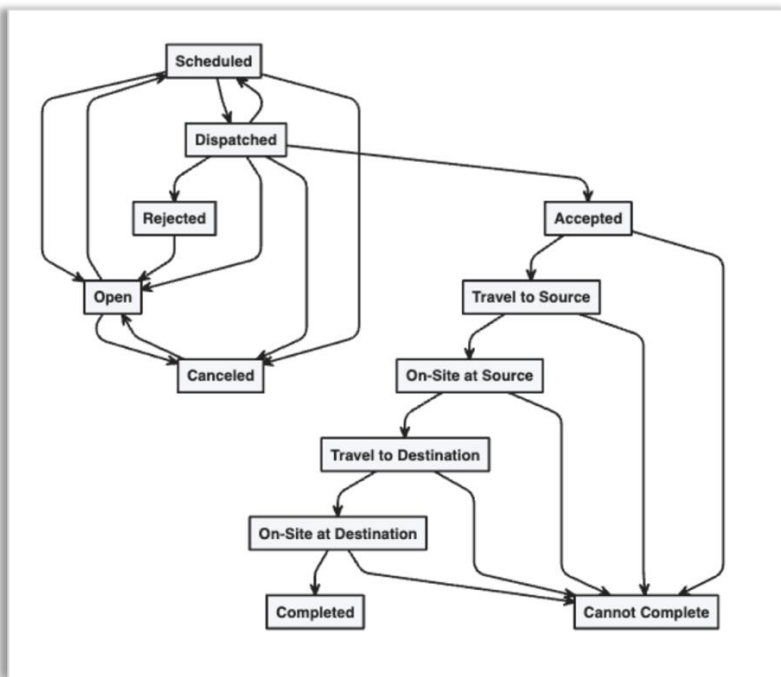
Automated Scheduling

Health Check

Service Appointment Status Transitions

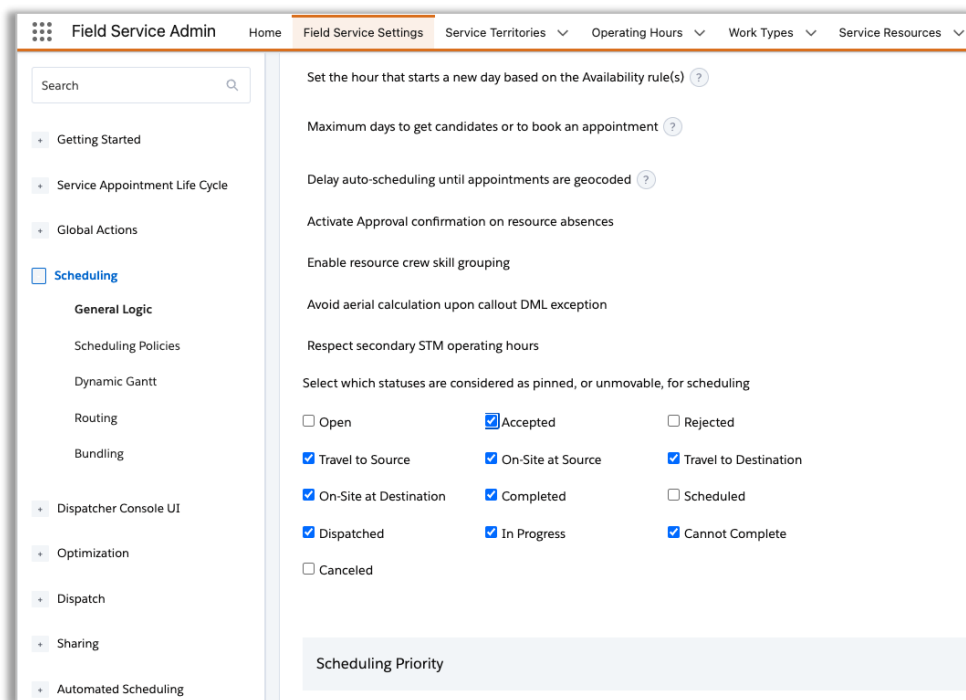
FROM	TO
Scheduled	Dispatched
Accepted	Travel to Source
On-Site at Source	Travel to Destinati
Dispatched	Rejected
Travel to Destinati	On-Site at Destina
Travel to Source	On-Site at Source
On-Site at Destina	Completed
Scheduled	Open
Dispatched	Scheduled
Scheduled	Canceled
Dispatched	Open
Rejected	Open
Accepted	Cannot Complete
Travel to Source	Cannot Complete
On-Site at Source	Cannot Complete
Dispatched	Canceled
Canceled	Open

The Status Transitions configuration should look like the following flow diagram.



Set Statuses to Pin for Scheduling

1. From the App Launcher, find and open **Field Service Admin**.
2. Click **Field Service Settings**, and then **Scheduling**.
3. Select statuses to pin for scheduling:
 - a. Scheduled
 - b. Dispatched
 - c. Accepted
 - d. Travel to Source
 - e. On-Site at Source
 - f. Travel to Destination
 - g. On-Site at Destination
 - h. Cannot Complete
 - i. Completed
4. Click **Save**.



The screenshot shows the 'Field Service Admin' interface with the 'Field Service Settings' tab selected. The left sidebar contains a search bar and a list of navigation items: Getting Started, Service Appointment Life Cycle, Global Actions, Scheduling (highlighted), General Logic, Scheduling Policies, Dynamic Gantt, Routing, Bundling, Dispatcher Console UI, Optimization, Dispatch, Sharing, and Automated Scheduling. The main content area is titled 'Set the hour that starts a new day based on the Availability rule(s)'. It contains several settings: 'Maximum days to get candidates or to book an appointment', 'Delay auto-scheduling until appointments are geocoded', 'Activate Approval confirmation on resource absences', 'Enable resource crew skill grouping', 'Avoid aerial calculation upon callout DML exception', and 'Respect secondary STM operating hours'. Below these is a section 'Select which statuses are considered as pinned, or unmovable, for scheduling' with a grid of checkboxes. The checked statuses are: Open, Accepted, Rejected, Travel to Source, On-Site at Source, Travel to Destination, On-Site at Destination, Completed, Scheduled, Dispatched, In Progress, and Cannot Complete. The 'Canceled' status is unchecked. At the bottom, there is a 'Scheduling Priority' section.

Optional Configurations

With the Material Transport App, there are several configurations that you can customize based on your material transport needs and workflows.

This section outlines procedures for the following optional capabilities.

- Enable recurring Work Orders.
- Disable default workflows.

Enable Recurring Work Orders

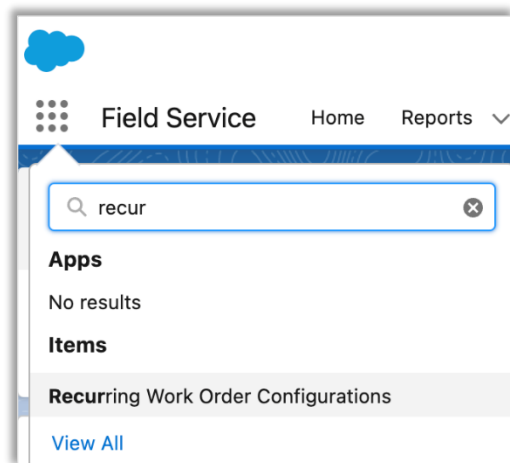
The Material Transport App includes the **Recurring Work Order Configuration** custom object that you can use to create work order configuration records with pre-defined work order details and can be scheduled on a recurring basis. An Apex Class that is included with the app must be scheduled to execute for the recurring work orders to get created.

Once recurring work order configuration records are created and are active, and the Apex Class schedule is configured, work orders will automatically get created with the pre-filled information on a recurring basis, on a frequency that you define in the record.

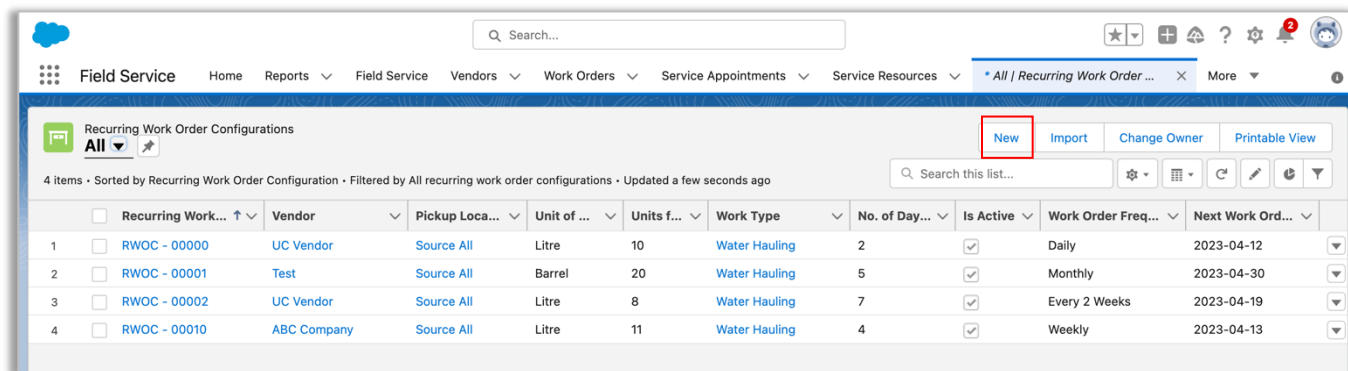
Create Recurring Work Order Configuration Records

To create a Recurring Work Order Configuration record.

1. Go to App Launcher, find and open **Recurring Work Order Configurations**.



2. From the Recurring Work Order Configurations list, click **New**.



Field Service Home Reports Field Service Vendors Work Orders Service Appointments Service Resources All / Recurring Work Order ... More

Recurring Work Order Configurations All

4 Items • Sorted by Recurring Work Order Configuration • Filtered by All recurring work order configurations • Updated a few seconds ago

Search this list...

	Recurring Work...	Vendor	Pickup Loca...	Unit of ...	Units f...	Work Type	No. of Day...	Is Active	Work Order Freq...	Next Work Ord...
1	☐ RWOC - 00000	UC Vendor	Source All	Litre	10	Water Hauling	2	☒	Daily	2023-04-12
2	☐ RWOC - 00001	Test	Source All	Barrel	20	Water Hauling	5	☒	Monthly	2023-04-30
3	☐ RWOC - 00002	UC Vendor	Source All	Litre	8	Water Hauling	7	☒	Every 2 Weeks	2023-04-19
4	☐ RWOC - 00010	ABC Company	Source All	Litre	11	Water Hauling	4	☒	Weekly	2023-04-13

3. Enter details for the New Recurring Work Order Configuration.
 - a. **Vendor:** Select a Vendor to submit the Work Order request to.
 - b. **Work Type:** Select the Work Type from your Work Type records.
 - c. **Pickup Location:** Select a Location from your Location records.
NOTE: Only Location records with Pickup Location as the Location Category will be available.
 - d. **Unit of Measure:** Select Litre, Gallon, Barrel, or Tonne.
 - e. **Units for Transfer:** Enter a value for number of units to transfer.
 - f. **Work Order Frequency:** Select Daily, Weekly, Every 2 Weeks, or Monthly.
 - g. **No. of Days to Complete:** Enter a value for the number of days to complete the Work Order from the Start Date. The value is used to set the End Date in the Work Order. The End Date will be Start Date + value entered.
 - h. **Next Work Order Date:** Select a start date for the first Work Order. Once the initial Work Order is created, this date will automatically update based on the frequency set.
 - i. **Work Order Record Type:** Enter a valid API Name of the work order record type for the work order that you want created.
NOTE: the RecurringWOConfigTriggerHandler Apex Class checks the work order record type value with configured record types in the Work Order object to ensure it is a valid record type. If the record type is not valid, or is inactive, an error displays upon save.
4. Enable **Is Active** checkbox and click **Save**.

New Recurring Work Order Configuration

* = Required Information

Recurring Work Order Configuration

* Vendor

* Work Type

* Pickup Location

* Unit of Measure

* Units for Transfer

* Work Order Frequency

* No. of Days to Complete

* Next Work Order Date

Work Order Record Type

Owner Gillian Florence

Is Active ☐

NOTE: If a record type is added to the Work Order Record Type field and then the record type is later set to inactive, the apex batch job will fail and any recurring work orders that are scheduled and active will not get created.

If an expected work order is not created based on a recurring work order configuration, go to Apex Jobs to review any errors.

Apex Jobs

Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.

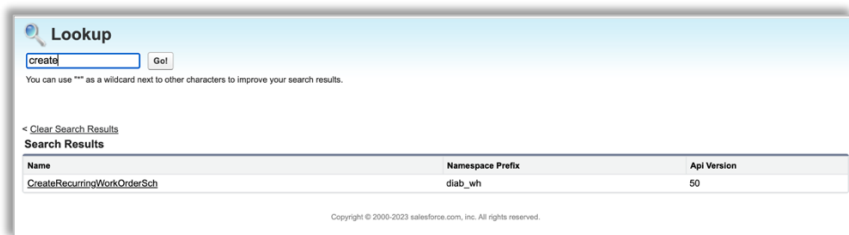
View: All [Create New View](#)

Action	Submitted Date	Job Type	Status	Status Detail	Total Batches	Batches Processed	Fail
	2023-07-18, 7:00 p.m.	Batch Apex	Completed		0	0	
	2023-07-18, 6:50 p.m.	Batch Apex	Completed		1	1	
	2023-07-18, 6:50 p.m.	Batch Apex	Completed		0	0	
	2023-07-18, 6:47 p.m.	Batch Apex	Completed		1	1	
	2023-07-18, 6:46 p.m.	Batch Apex	Completed		1	1	
	2023-07-18, 6:41 p.m.	Batch Apex	Completed	First error: Record type is not active	1	1	
	2023-07-18, 6:20 p.m.	Scheduled Apex	Queued		0	0	

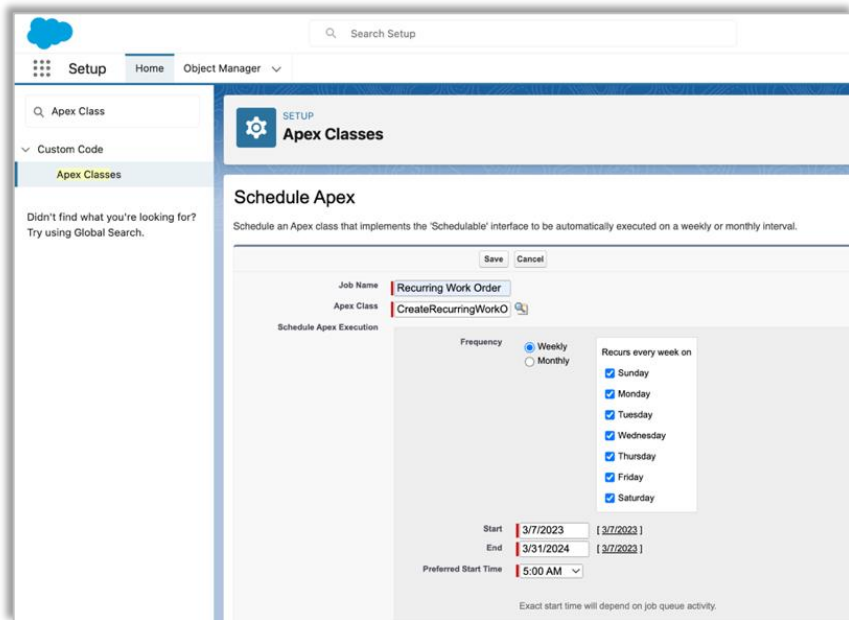
Schedule Apex Class

For any active recurring Work Order to get created, the provided Apex Class needs to be scheduled to execute.

1. From Setup, enter Apex Classes in the Quick Find box, and select **Apex Classes**.
2. From the Apex Classes list, click **Schedule Apex**.
3. In the Schedule Apex page, enter a Job Name.
4. For the Apex Class field, click the find icon, locate, and click **CreateRecurringWorkOrderSch**.



5. Set the Frequency of the Schedule Apex Execution to Weekly.
6. Enable every day and then **Save**.



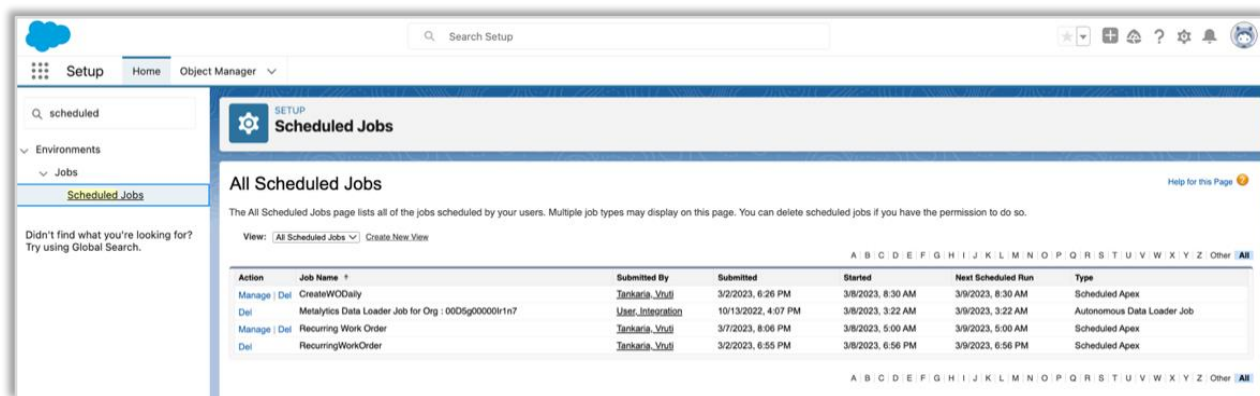
NOTE: To support various timeframes of Recurring Work Order Configurations, you must enable the apex scheduler job to run daily. We also recommend setting an end date far in advance of the start date.

*Only Recurring Work Order Configurations that are set to **Is Active** will run.

Manage Scheduled Jobs

Once the job is scheduled, if you need to change the scheduled job, you will need to delete the existing job and then create another Apex Schedule.

1. From Setup, enter scheduled jobs in the Quick Find box, and click **Scheduled Jobs**.
2. Next to the Job Name, click **Del**.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "scheduled" entered. Under "Environments", the "Jobs" section is expanded, and "Scheduled Jobs" is selected. The main content area is titled "Scheduled Jobs" and includes a description: "The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so." Below this is a table of scheduled jobs.

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Manage Del	CreateWODaily	Tankara_Vhul	3/2/2023, 6:26 PM	3/8/2023, 8:30 AM	3/9/2023, 8:30 AM	Scheduled Apex
Del	Metalytics Data Loader Job for Org : 00D5g00000r1n7	User Integration	10/13/2022, 4:07 PM	3/8/2023, 3:22 AM	3/9/2023, 3:22 AM	Autonomous Data Loader Job
Manage Del	Recurring Work Order	Tankara_Vhul	3/7/2023, 8:06 PM	3/8/2023, 5:00 AM	3/9/2023, 5:00 AM	Scheduled Apex
Del	RecurringWorkOrder	Tankara_Vhul	3/2/2023, 6:55 PM	3/8/2023, 6:56 PM	3/9/2023, 6:56 PM	Scheduled Apex

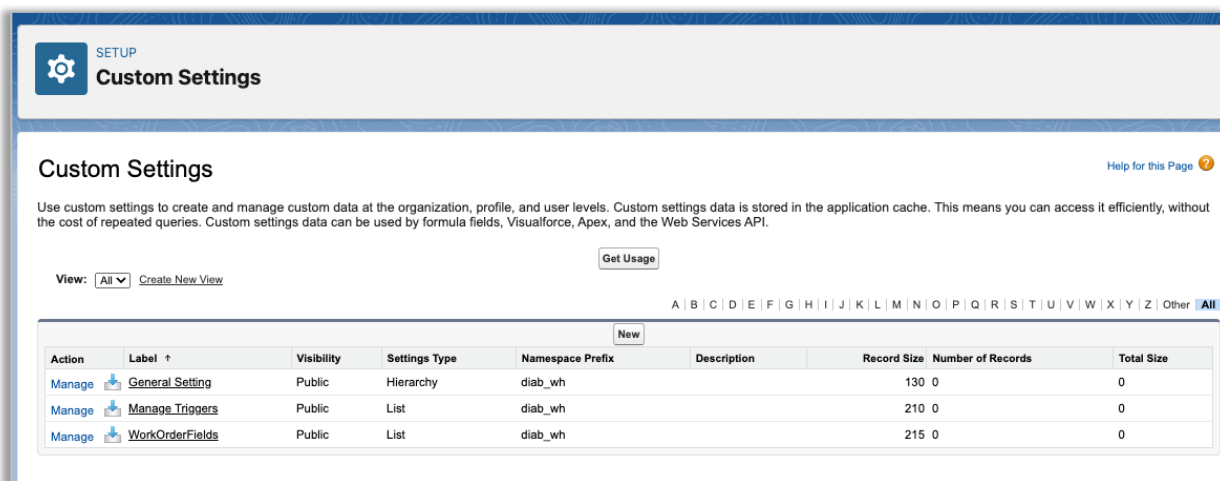
Disable Default Workflows

The following default actions occur within the Material Transport App workflow.

- Service Appointments are automatically created when a Work Order is accepted.
- Work Orders are automatically completed when all Service Appointments are completed.
- Work Order Line Items are automatically completed when all Service Appointments are completed.

Any of these automatic actions can be disabled in Custom Settings.

1. From Setup, enter custom settings in the Quick Find box, and then select **Custom Settings**.
2. From the Custom Settings page, click **Manage** next to General Setting.



Custom Settings

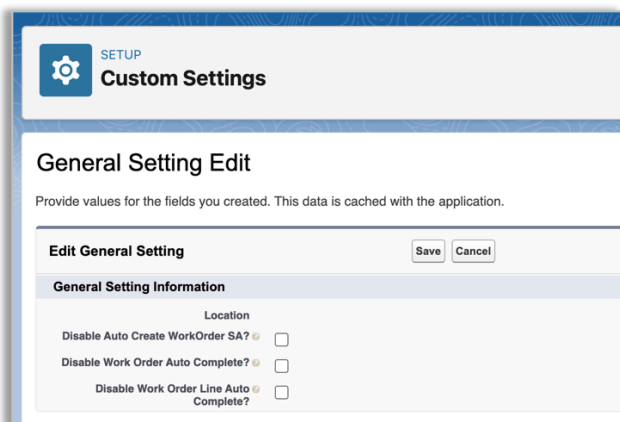
Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

View: All [Create New View](#) [Get Usage](#)

[New](#)

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	General Setting	Public	Hierarchy	diab_wh		130	0	0
Manage	Manage Triggers	Public	List	diab_wh		210	0	0
Manage	WorkOrderFields	Public	List	diab_wh		215	0	0

3. Click **New**.
4. In the General Setting Edit page, select the settings you want disabled and click **Save**.



General Setting Edit

Provide values for the fields you created. This data is cached with the application.

Edit General Setting [Save](#) [Cancel](#)

General Setting Information

Location

Disable Auto Create WorkOrder SA? ☐

Disable Work Order Auto Complete? ☐

Disable Work Order Line Auto Complete? ☐

The saved configuration can then be edited if any settings need to be modified in the future.