

Maintenance Work Rule Editor

Set up Instructions

ADD NEW WORK RULE ACTION TO MAINTENANCE ASSET PAGE

- Go to Setup in Salesforce, select **Object Manager** and click **Maintenance Asset**.
- Click **Page Layout**, and open **Maintenance Asset Layout**.
- In **Mobile & Lightning Action**, search for New Work Rule, and drag it to the **Experience Actions** section, which ensures that it is the first item in the section.
- Save the page layout.

ADD EDIT WORK RULE ACTION TO MAINTENANCE WORK RULE PAGE

- In Setup, select **Object Manager** and click **Maintenance Work Rule**.
- Click **Buttons, Links, and Actions** then **New Action**.
- For Action Type, select **Lightning Component**.
- For Lightning Component, select `rrule__WorkRuleComponent`.
- For Label, type in `Edit recurrence`.
- Save your changes.
- Click **Page Layout**, and open **Maintenance Work Rule Layout**.
- In **Mobile & Lightning Action**, search for Edit recurrence, and drag it to the **Experience Actions** section, which ensures that it is the first item in the section.
- Save the page layout.

ADD EDIT WORK RULE ACTION TO MAINTENANCE PLAN PAGE

- In Setup, select **Object Manager** and click **Maintenance Plan**.
- Click **Buttons, Links, and Actions** then **New Action**.
- For Action Type, select **Lightning Component**.
- For Lightning Component, select `rrule__WorkRuleComponent`.
- For Label, type in “New Work Rule”.
- Save your changes.
- Click **Page Layout**, and open **Maintenance Plan Layout**.
- In **Mobile & Lightning Action**, search for “New Work Rule”, and drag it to the **Experience Actions** section, which ensures that it is the first item in the section.
- Save the page layout.

Guide

CREATE A NEW MAINTENANCE WORK RULE

- Open the maintenance asset you want to add a Maintenance Work Rule to.
- Click **New Work Rule**

Service

HomeChatterAccountsContactsCasesKnowledgeDashboardsMore

Maintenance Asset

MP-0046

New Work RuleNew AccountNew Article

Asset

Work Type

Contract Line Item

Asset

Pool1

Related

Details

Information

Maintenance Asset Number

MA-0045

Maintenance Plan

MP-0046

Asset

Pool1

Contract Line Item

Date of the first work order in the next batch

6/1/2020

Work Type

Maintenance Work Rules (3+)

MWR-0158

Maintenanc...

Sort Order: 1

Recurrence ... Every year on September 30 with no ...

MWR-0118

Maintenanc...

Sort Order: 1

Recurrence ... Every month on the first Sunday with...

MWR-0110

Maintenanc...

Sort Order: 1

Recurrence ... Every 10000000000000000 weeks on...

View All

Add a title, select a work type, and add the work rule details.

- Save your details.

- Navigate to the maintenance work rule and click **Edit Work Rule**.
- Update the work rule details and save the record.