



# SALESFORCE FIELD SERVICE TOP 20 FAQs



An Admin's best friend!

I've been a Salesforce Administrator for about 7 years and worked many companies, on many projects, with many different partners. In fact, I actually found Cirrius after a botched implementation with a not-so-great partner. The second implementation was 100% better all around! Cirrius Solutions are an Admin's best friend! They are great to work with, and get things done! I am certain I will maintain a relationship with them throughout my career!

**Kelly Freeman**



There are so many things to consider when looking at implementing Field Service Lightning for your business. However, the main consideration is usually functionality! Below we've outlined some of the most frequently asked questions by customers considering FSL as a solution for their business.

### **1. Can my agents record labor hours and travel time using Salesforce FSL?**

Yes! The ability to report on labor hours and travel time is one of FSL's many useful features. Salesforce uses maps and has geolocation tracking built into the system. Agents can enter the amount of time spent on a work order or work order line item and include additional comments. Timesheets need some basic configuration beyond the out-of-the-box functionality to achieve this. However, it's as simple as creating a few formula fields to get you the totals you need.

### **2. Can we use Salesforce FSL in the field where there is no internet access?**

Yes! The mobile app connects field crews with your in-office service teams, even when they don't have internet connectivity. Through the app, field crews can access all work order details and supporting technical resources. The app's offline capability allows crew members to continue using the platform without Wi-Fi or cell service. All changes are saved once a connection is re-established.

### **3. Can our field service agents attach images from the mobile device using the Salesforce FSL software?**

Yes! The ability to take pictures and attach them directly to the account in Salesforce is standard functionality for Field Service Lightning.



## Why Use A Certified Partner?

- Accountability for quality & delivery
- Development done right the first time
- Rapid time to value
- Deliver scalable solutions to meet growth needs
- Help you drive user adoption

## 4. Can Field Service agents attach the details of the work order?

Yes! Work orders are a central object of Salesforce Field Service Lightning. When creating a work order, agents even have the option of choosing a prebuilt template. The templates will automatically populate information like required skills and even parts, though that takes a bit of configuration.

Work Order line items will specify each task to be performed on a job, and individual line items can be assigned to different crew members. After the work order tasks have been completed, the results can be saved directly to Salesforce.

## 5. Does the Salesforce Field Service scheduler account for local traffic?

Yes! We can integrate Google Maps to show dispatch and the agent real-time traffic conditions, keeping routes as efficient as possible. This not only helps maximize your service agents' time in the field but also reduces costs associated with gas and wear and tear on vehicles.

## 6. Can my Field Service agents receive push notifications?

Yes! Push notification alerts can be sent to your mobile workforce for appointment updates and schedule changes. However, technicians are not automatically added as followers to work orders and service appointment records that they are assigned to. Best practice to achieve this is to create an Apex trigger on the service resource object to add or remove users as followers when assignments change.

## 7. What can I do to speed up the loading of field service appointments on my mobile device?

This can be achieved by reducing the number of days to show in the app under the Field Service Mobile settings. The default for 'Future Days' is 45. You can increase performance by trimming that number down to the number of days that make sense for your business model. This not only accelerates load times but also allows quicker offline syncing.

## 8. Can Salesforce Field Service agents customize their schedule tab view?

To ensure data quality and consistency of process, it is not best practice to allow agents to customize this. However, if your service team has requested, your admin would certainly be able to customize the schedule tab view as needed.



## Quick Facts

- Top 1% of Salesforce Consulting Firms
- We have 95% of the certifications available on the platform
- We practice Salesforce best practices from start to finish
- Over 85 5-start reviews!
- Over 500+ Successful implementation across the globe

## 9. Can we track multiple inventory locations using Salesforce FSL?

Yes, we can set up multiple “places” that store inventory, like warehouses, customer sites, or work vehicles, through locations so you can track the items stored there and restock when necessary.

## 10. How do I manage inventory in Salesforce FSL?

It is possible to account for all inventory in Salesforce using automation to update stock levels as products are consumed, transferred, or returned. In addition, we can add the products required for work types, work orders, and work order line items to ensure that the assigned service resource arrives with the right equipment.

## 11. Can we use barcodes on hardware that can be scanned from the mobile device to track assets and inventory?

Yes! This is an amazing feature. The Salesforce Field Service app will allow you to attach 1D serial barcodes and 2D QR codes to your devices. From there, you can use your mobile devices (Android and iPhone are both compatible) to scan inventory and automatically update in Salesforce.

## 12. Can I manage service crews in Salesforce Field Service Lightning?

Yes! You can manage your service crews to accommodate a fast-changing field service schedule. You can create crews, find and add members with the right skills manually or automatically, adjust membership dates to match appointment times, and view all crews' schedules and members in one interface.

## 13. Can Salesforce Field Service Lightning help us manager worker shifts?

Yes! However, this is a beta product. Shifts in Field Service Lightning let you define variable working periods for your shift-based workforce, such as contractors or on-call staff. You can create shifts for particular dates and times when you need coverage and assign them to service resources.



## 14. How do I optimize dispatching in Salesforce Field Service Lightning?

Best practice to ensure you have the right person for the right job is to create scheduling dependencies between service appointments and job assignments using assignment rules based on agent availability, skill sets, experience level, and location.

## 15. Can the Salesforce Field Service Lightning application help me group nearby service appointments?

Absolutely! You can minimize travel time or gaps between appointments, use the 'Group Nearby Appointments' action on a service appointment. This feature removes appointments that were scheduled later that day and replaces them with appointments that are closer in location to the source appointment.

## 16. How do I account for resource absences in Salesforce FSL?

You can create resource absences in the Field Service Lightning mobile app. Resource absences indicate when a service resource is unavailable to work. During schedule optimization, service resources aren't assigned to appointments that conflict with their absences. The best part is you can view and manage absences from the profile tab in the app!

## 17. Can we update Field Service appointments directly from the mobile application?

In terms of out of the box functionality, appointments can't be updated manually from the mobile app. However, it is possible to create a flow to achieve this.

## 18. Can I have customers sign work orders in the field for completed work?

Not exactly, you cannot sync the work order directly, but you can create service reports to give your customers summaries of the work that your field service team performed. A service report is a PDF that summarizes a work order or service appointment that your customers and team members can sign using e-signature applications.



## What Makes Cirrius Solutions Different?

# 500+

We've Completed Over 500 Projects

# TOP 1%

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Our 5 Star Average Rating on Appexchange

## 19. Can I use communities to help manage Field Service operations?

Yes! You can create a Salesforce community to connect with your business partners, employees, or customers. Keeping the communication lines open is key to field service success, so this is a great use case for communities! Want to stay in sync with contractors? You can add work orders and service appointments to a partner community for visibility and ease of communication. Want to make your customers' experiences super convenient? Processing return orders and return order line items to a community to coordinate customer returns is just one example of how to achieve this using a community.

## 20. How do I share help documents to my Field Service agents in the field?

Implementing Salesforce Knowledge would be the perfect tool for this. You can create knowledge articles and attach them to work orders, work order line items, and work types for technicians in the field. This includes installation instructions, FAQ's, help guides, policies, and procedures. All of these are available for Field Service agents on a mobile device.

## WHY UTILIZE CIRRIUS SOLUTIONS SALESFORCE FIELD SERVICE LIGHTNING TEAM:

We are rock solid at setting up Salesforce field service lightning projects! We tell you the truth and, we don't exaggerate. We all have strengths and weaknesses. At Cirrius, we will provide an honest synopsis of our team members' experience to arrive at the perfect team for your Salesforce field service lightning project. We are smart, reliable, work tirelessly, and are masters of our individual development areas.

We hope these Field Service Lightning FAQ's were helpful!

## Ready to move forward on your next Salesforce project?

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Please don't hesitate to contact us at [info@cirriussolutions.com](mailto:info@cirriussolutions.com) for more information!

