



# Field Service Starter Kit: Simple Implementation Guide

for Demo and Testing

Spring '21

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## When to use this document

The intended audience for this document is salesforce admins who are implementing Salesforce Field Service and are looking to learn about, test and/or demo the Field Service Starter Kit package in their sandbox or demo org.

In this guide, we will show you how to quickly set up the Field Service Starter Kit package and enable its 13 features.

## Please do not use this document as an implementation guide for your production org

If you would like to implement the Field Service Starter Kit for your production use, the [Field Service Starter Kit Production Implementation Guide](#) contains a complete set of setup steps you need to follow to ensure a smooth and successful implementation.

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# Important notes from the Salesforce Field Service Starter Kit team

- Salesforce Field Service Starter Kit is a [Salesforce Labs](#) managed package containing Flow Templates that you can enable and use out of the box.
- You can use the starter kit in your production org but please follow best practices and clone the flows and make them your own - do not use the flow templates themselves. The reason behind this is that flow templates may be upgraded in future versions and if you will want to upgrade to a newer version the package flow templates may be overridden.
- This document you are currently reading is the Field Service Starter Kit Simple Implementation Guide that helps you set up a demo or test environment quickly. For production usage you should follow the [Field Service Starter Kit Production Implementation Guide](#) that will take you through the necessary steps to clone the templates and explain how you can customize it for your own use
- We plan to upgrade the package periodically with additional features and your input is important - join our [\\* Field Service Starter Kit \\*](#) group on the Trailblazer Community to engage with the team members and other customers like you and let us know what you would like to see in future versions.
- Salesforce Labs solutions like the Salesforce Field Service Starter Kit app are not official salesforce products and as such do not have salesforce official support. However, our team is committed to fix issues and answer any question you may have. The [\\* Field Service Starter Kit \\*](#) group on the Trailblazer Community is the place to post your questions and raise your issues.

## Introduction to the Package Features

Field Service Starter Kit contains 13 features that you can easily enable, test, and roll out to your users. Most of these features – all to the exception of one – are based on Flow Templates, which you can clone and customize to meet your company needs. We group the features into three different families – Status Based features, Mobile Notifications, and General Flows. This document describes in detail how to enable or modify these features in later chapters, but first let's get familiar with these three families and what features come with each of them.

### The Starter Kit's status-based flows

This feature family includes two main features that capture time when the field worker starts and finishes a job, and a third feature that enables offline use of the other two features:

- **Automatically Update the Actual Start and Actual End Fields** - This feature populates the Actual Start field when the field worker begins the job and the Actual End field when the job is completed. The feature also calculates the Actual Duration field.
- **Automatically update the Scheduled Start and Scheduled End fields** - The Scheduled Start and Scheduled End fields are updated based on when a work has begun or ended, thereby updating the service appointment block on the Gantt chart.
- **Status Transition (Field Service Mobile Flow)** - Accurate time capturing is difficult without online connectivity. In this Field Service Mobile Flow, the device time is used to record when work began or ended so when the device comes online again and is synced, the system will use the actual times as opposed to the sync time. Using this feature your users update their service appointment statuses while following the permitted status flow.

## The Starter Kit's mobile notifications flows

Custom Notifications are a great way to alert your mobile workers on important changes to their schedule so they could respond in a timely manner. The Starter Kit package includes 3 out of the box notifications that you can use:

- **Notification of appointment dispatching** - When the Service Appointment status changes to a value that maps to the Dispatched Status Category, a custom notification is sent.
- **Notification of emergency appointment dispatching** - When an **emergency** Service Appointment status changes to a value that maps to the Dispatched Status Category, a custom notification is sent.
- **Notification of appointment cancelation** - When a Service Appointment status changes to a value that maps to the canceled Status Category, a custom notification is sent.

## The Starter Kit's general flows

- **Add asset to account maintenance plan upon installation** - The account maintenance plan is updated with the installed asset after a service appointment has been completed.
- **Field Service users automation** - When user records are created, this feature automatically assigns Field Service permission sets to users. If the user is a field worker, a service resource record will be automatically created as well. The starter kit package introduces a new field, which triggers the process. This feature is not based on a flow, but rather an Apex trigger and validation rules.

- **Exclude service resources upon service appointment rejection** - When assigned resources reject the assignment they are added to the Work Order as excluded resources. The Reject Service Appointment checkbox field that the package introduces is triggering the flow.
- **Populate the custom Service Resource Lookup field on the Service Appointment Record** - This flow copies the Service Resource ID from the Assigned Resource related list to the new Assigned Service Resource lookup field introduced by the package.
- **Set a custom Work Order lookup field to the Service Appointment's Parent ID** - A Work Order Lookup Field is populated with the parent ID if the parent is a Work Order.
- **Automatically set the Gantt Label field** - With this flow, the Gantt Label field is automatically populated with the Customer name and work type.
- **Service Resource deactivation automation** - Field Service licenses are removed from users automatically when the corresponding Service Resource record is deactivated

## Installation Guide

### Starter Kit - Pre Installation Requirements

Field Service Starter Kit assumes that:

- You already enabled Field Service in your Org
- The latest Salesforce Field Service managed package is installed
- That you already configured the Field Service Mobile Application (meaning you already enabled your users to log and use the field service mobile application).

### Install and Configure the Field Service Starter Kit Package

#### Install Field Service Starter Kit Managed Package

Field Service Starter Kit is a package with different flow templates that you can install and start using. In this step you install the package.

1. Click the installation link on the download page: <https://fsl.secure.force.com/install>  
You can install the starter kit managed package on a production or sandbox org.
2. **Select Install for Admins Only.**

3. If a message indicates that the installation is taking longer than expected, click Done. You'll receive an email notification after the installation is complete.

## Add the Starter Kit Settings page to the Field Service Admin app

The Starter Kit Settings page is where the admin can activate and configure the different features that come with the starter kit. In this step you add the page to the Field Service Admin App for easier access.

1. From setup, search for 'App manager' in the quick find box.
2. Select the Field Service Admin App (or any other app that makes sense to you) and click Edit under the action drop down menu.
3. In the Available Tabs box find the Field Service Starter Kit Settings tab and add it to the Selected Tabs box.
4. Keep the remaining current settings as is and click Save.

**Note:** for Lightning Console Apps the steps to add a tab are slightly different. See more here: [Salesforce Help: Personalize the Navigation Menu for Lightning Console Apps](#)

5. Test that you can access the Field Service Starter Kit Setting tab.

The screenshot shows the 'Field Service Starter Kit Settings' page. It is organized into three main sections:

- Status Based Flows:** Contains three checkboxes for automatic updates of Actual Start/End and Scheduled Start/End fields. To the right, there are two columns of checkboxes for 'Select starting status' (Scheduled, Dispatched, In Progress, Travel, Approaching) and 'Select ending status' (Cannot Complete, Completed).
- Mobile Notifications:** Features a 'Deactive' toggle switch and a text input for 'Hours before the appointment start time'. Below are three checkboxes for notifications: 'Notification of appointment dispatching', 'Notification of emergency appointment dispatching', and 'Notification of appointment cancellation'.
- General Flows:** Includes a checkbox for 'Add asset to account maintenance plan upon installation'. Below it is a text input for 'Number of days for work order creation' and a dropdown menu for 'Select completion / installation status' (set to 'Completed'). The section ends with seven more checkboxes for various automation features like 'Field Service users automation', 'Exclude service resources upon service appointment rejection', and 'Service Resource deactivation automation'.

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

Diagram I: Field Service Starter Kit Settings screen

# Manage Permissions for the Field Service Starter Kit

In order for users to benefit from the features included in the Starter Kit, they will need the right access to fields and settings.

In this document that addresses admins who like to demo or test the out-of-the-box features we assume you use a System Administrator that is assigned to the Field Service Admin Permissions and the Field Service Dispatcher License permission sets. If you want to learn about specific permissions for the Field Service Starter Kit package please read the [Field Service Starter Kit Production Implementation Guide](#).

## Features-specific Configuration

### Status Based Flows

#### 1. Status Transition (Field Service Mobile flow)

With this feature, your mobile users can update the status of their service appointments while adhering to the permitted status flow. In this feature, time is captured based on a status definition and feeds that time to the next two Status Based Flows in the package. This flow must be enabled if you want to use the Automatic Updates to the Actual Start/End Fields or Scheduled Start/End Fields **and you need offline support**. This means if you don't enable it, and the mobile user is offline, instead of recording the time of the action, it will record the time the sync took place.

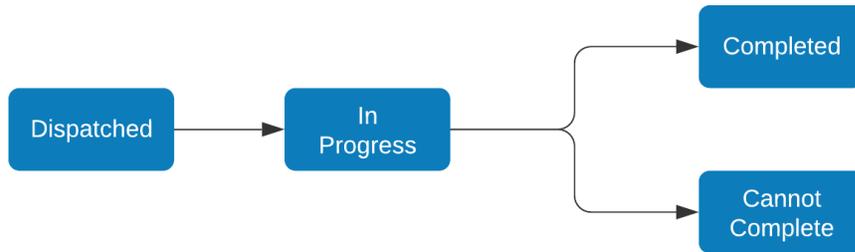
The feature uses two fields from the Starter Kit Package to store the time when the job began and the time when the technician completed the job. These fields are the Mobile Start Time and Mobile End Time.

#### How to Enable:

1. **Clone the Field Service Mobile Status Transition flow and activate the cloned version.**
  - a. From Setup, enter Flows in the Quick Find box, then click Flows under Process Automation.
  - b. Find the FSSK Field Service Mobile Status Transition flow template and click its name.
  - c. Click on Deactivate (It is a good practice to deactivate the template itself once we intend to use the cloned version).
  - d. Click on Save As to make a clone. Name your cloned flow "FSSK CLONE Status Transition".

- e. Activate your new flow.

**IMPORTANT NOTE:** The default status transition that is included with the flow template may need to be adjusted. The [Field Service Starter Kit Production Implementation Guide](#) provides guidance on how to modify the flow to meet the needs of your organization.



*Diagram III: The Starter Kit Default Status Transition*

## 2. Create App Extension that connects the flow to the Field Service Mobile App

- a. From Setup, enter Field Service Mobile Settings in the Quick Find box, then select Field Service Mobile Settings.
- b. Click the name of the mobile settings configuration that you want to create an app extension for.
- c. Under App Extensions, click Add.
  - i. Fill out the fields.
    1. Field Service Mobile Settings: Automatically populated. Represents the current Mobile Field Service Settings configuration.
    2. Type: select Flow.
    3. Label: The label as it appears to users in the app. (Example: Status Transition). The label isn't localized automatically.
    4. Name: The extension's name. (you can use the same value as your label)
    5. Scoped To Object Types: ServiceAppointment.
    6. Launch Value: the API name of the cloned flow we created (FSSK\_CLONE\_Status\_Transition).
  - ii. Click Save.

## 3. Go to the Field Service Starter Kit Settings tab and enable the feature:

- a. In the Status Based Flows section, check the box next to **Status Transition (Field Service Mobile Flow)** feature.
- b. Pick all the status values that represent when work begins from the 'Select starting status' checklist. When a mobile worker changes the service appointment status to

any of these values, the flow will capture the current time and update the **Mobile Start Time** field accordingly.

- c. Repeat for ending status in the second checklist. The flow will update the **Mobile End Time** field when the service appointment status changes to any of these.

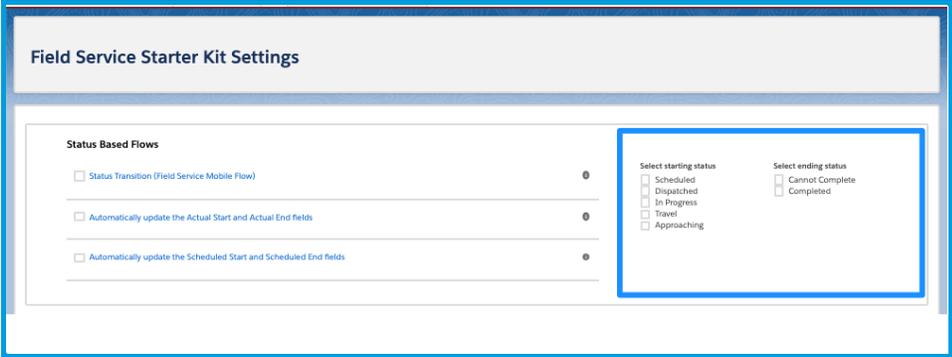
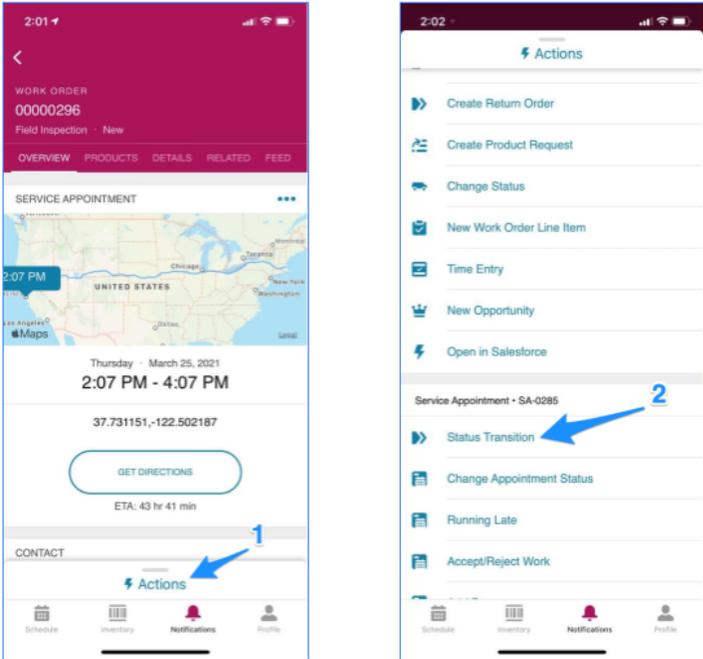


Diagram IV: Starting Status / Ending Status Definition For Status Based Flows

- d. **Click Save.**



## 2. Automatically Update the Actual Start and Actual End Fields

Updates to the Status of the Service Appointment cause the Actual Start, Actual End, and Actual Duration fields to be updated with the accurate time and duration. Using this feature, you can build reports to analyze actual versus planned . This can help you maintain your Work Type duration more accurately for better schedule planning.

### Entry Criteria:

For Scheduled Start field update:

[Service Appointment status changed && status is mapped to a 'Starting Status' value](#)

For Scheduled End field update:

[Service Appointment status changed && status is mapped to a 'Ending Status' value](#)

### How to Enable:

**Go to the Field Service Starter Kit Settings tab and enable the feature:**

- a. In the Status Based Flows section, check the box next to **Automatically update the Actual Start and Actual End fields** feature.
- b. Pick all the status values that represent when work begins from the 'Select starting status' checklist. When a mobile worker changes the service appointment status to any of these values, the flow will capture the current time and update the Actual Start field accordingly.
- c. Repeat for ending status in the second checklist. The flow will update the Actual End field when the service appointment status changes to any of these.
- d. **Click Save.**

### Considerations:

1. The Actual Duration field values are being updated based on the Actual Start and Actual End fields. If one of the fields is empty, Actual Duration will be zero. Records created before this feature was activated might require data fix.
2. For this feature to be supported for offline use, you need to enable the [Field Service Mobile Status Transition](#). In the mobile app, the Mobile Status Transition flow updates the Mobile Start Time and Mobile End Time fields, which are the base for the Actual Start and Actual End fields.
3. The 'Automatically update the Scheduled Start and Scheduled End fields' and the 'Status Transition (Field Service Mobile Flow)' features also use the same starting/ending status values as this feature.

### 3. Automatically update the Scheduled Start and Scheduled End fields

Automatically update Scheduled Start and Scheduled End fields in the Gantt chart to reflect the start and end time of a service appointment as reported by a field employee. This is required by customers who have to make decisions in real-time when their schedules change. The original schedule values are copied into the fields 'Planned Scheduled Start' and 'Planned Scheduled End' introduced in the Starter Kit package.

#### Entry Criteria:

For Scheduled Start field update:

[Service Appointment status changed && status is mapped to a 'Starting Status' value](#)

For Scheduled End field update:

[Service Appointment status changed && status is mapped to a 'Ending Status' value](#)

#### How to Enable:

**Go to the Field Service Starter Kit Settings tab and enable the feature:**

- a. In the Status Based Flows section, check the box next to **Automatically update the Scheduled Start and Scheduled End fields** feature.
- b. Pick all the status values that represent when work begins from the 'Select starting status' checklist. When a mobile worker changes the service appointment status to any of these values, the flow will capture the current time and update the Scheduled Start field accordingly.
- c. Repeat for ending status in the second checklist. The flow will update the Scheduled End field when the service appointment status changes to any of these.
- d. **Click Save.**

#### Considerations:

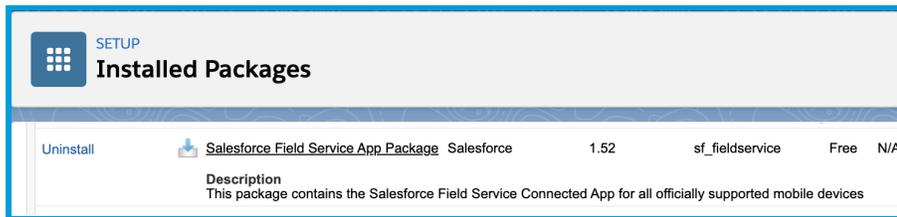
1. For this feature to be supported for offline use, you need to enable the [Field Service Mobile Status Transition](#). In the mobile app, the Mobile Status Transition flow updates the Mobile Start Time and Mobile End Time fields, which are the base for the Actual Start and Actual End fields.
2. The 'Automatically update the Actual Start and Actual End fields' and the 'Status Transition (Field Service Mobile Flow)' features also use the same starting/ending status values as this feature.
3. The feature is updating the Scheduled Start and Scheduled End fields which may cause rule violations and scheduling overlaps.

## Mobile Notifications

Custom Notifications are a great way to alert your mobile workers on important changes to their schedule so they could respond in a timely manner. The Starter Kit package includes 3 out of the box notifications that you can use.

### Mobile Notification Prerequisites

1. The latest Field Service Mobile [Connected App](#) is installed.



2. [Field Service Mobile app](#) version 230.2.0 or higher is installed in your users' device.

## General Mobile Notification Configuration

### Enable the supported apps for the Starter Kit Notification Type:

1. From Setup, enter Notification Builder in the Quick Find box, then select Notification Delivery Settings.
2. Choose the Starter Kit Notification Settings type, and select Edit from the dropdown menu.
3. Select 'Salesforce Field Service for iOS' and/or 'Salesforce Field Service for Android' and click save.

### Enable The Mobile Notifications Features

The notification feature family is controlled by a master toggle that enables/disables all of them. The *Hours before appointment start time* settings make sure notifications are only sent when they are relevant -notifications will only be sent to the mobile device if the appointment is scheduled to start before the specified number of hours.

1. On the Field Service Starter Kit settings page, activate the Mobile Notifications feature family by clicking the toggle on the right hand side of the section.
2. Specify the number of hours for *hours before the appointment start time*. For example, if you want technicians to get notified about work scheduled within 24 hours, then enter 24 in the field.
3. Click save at the bottom of the screen.

## 4. Notification of appointment dispatching

When the Service Appointment status changes to a value that maps to the Dispatched Status Category, a custom notification is sent.

### Entry Criteria:

*Service Appointment status changed && status category is Dispatched && Scheduled Start Time < NOW() + [hours before the appointment start time]*

### How to Enable:

**Go to the Field Service Starter Kit Settings tab and enable the feature:**

- a. In the Mobile Notifications section, check the box next to **Notification of appointment dispatching** feature.

## 5. Notification of emergency appointment dispatching

When an **emergency** Service Appointment status changes to a value that maps to the Dispatched Status Category, a custom notification is sent.

**Entry Criteria:**

*Service Appointment status changed && status category is Dispatched && Scheduled Start Time < NOW() + [hours before the appointment start time] && FSL\_\_Emergency\_\_c == TRUE*

**How to Enable:**

**Go to the Field Service Starter Kit Settings tab and enable the feature:**

- a. In the Mobile Notifications section, check the box next to **Notification of emergency appointment dispatching** feature.

## **6. Notification of appointment cancelation**

When a Service Appointment status changes to a value that maps to the canceled Status Category, a custom notification is sent.

**Entry Criteria:**

*Service Appointment status changed && status category is canceled && Scheduled Start Time < NOW() + [hours before the appointment start time] && FSL\_\_Emergency\_\_c == TRUE*

**How to Enable:**

**Go to the Field Service Starter Kit Settings tab and enable the feature:**

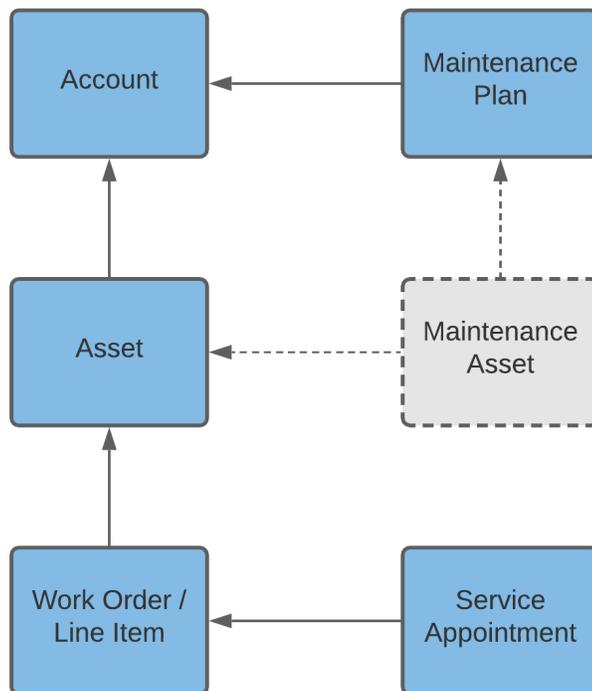
- a. In the Mobile Notifications section, check the box next to **Notification of appointment cancelation** feature.

## General Flows

### 7. Add asset to account maintenance plan upon installation

The account maintenance plan is updated with the installed asset after a service appointment has been completed.

- A checkbox field introduced by the package is what defines a service appointment as an asset installation job - when that field is checked and the status is set to complete the flow will be triggered.
- The asset will be added if a maintenance plan is active for the account based on the plan start and end dates.
- The feature supports both Work Orders and Work Order Line Items as the parent for service appointments, as long as the asset is also linked to the parent. No other Service Appointment parent types are supported.
- The first maintenance date will be calculated based on the *Number of days for work order creation* setting and the current date.



#### Entry Criteria:

*FSSK\_\_FSK\_Add\_Asset\_to\_Maintenance\_Plan\_\_c == TRUE && Status is mapped to 'completion / installation status'*

**General Flows**

Add asset to account maintenance plan upon installation ?

Number of days for work order creation:  ?

Select completion / installation status:  ?

## How to Enable:

### Go to the Field Service Starter Kit Settings tab and enable the feature:

- a. In the General Flows section, check the box next to **Add asset to account maintenance plan upon installation** feature.
- b. Enter the number of days post installation date that you would want the first work order to be created. The first maintenance date will be calculated based on the *Number of days for work order creation* setting and the current date.
- c. Select the Status value that indicates that the installation service appointment is complete. The value must be mapped to the Completed status category.

### Automatically set the Add Asset to Account Maintenance Plan field (recommended customization)

The Add asset to account maintenance plan upon installation feature relies on a user manually setting the Add Asset to Account Maintenance Plan field to true for service appointment where an asset is installed. You can use your company processes to identify these service appointments by some logic and use that to automate this process. In the below simple example we are showing how we can modify the FSSK Clone: Service Appointment process to automatically set the field to true if the Work Type contains the string 'Install'.

Example:

### Edit the FSSK Service Appointment process and add a new Update Records action

1. From Setup, enter Builder in the Quick Find box, then select Process Builder.
2. Open the **FSSK Service Appointment** process.
3. Click **Deactivate**.
4. Click Confirm.

5. Click Clone.
6. Choose “A new process” under the “Save Clone as...” option
7. Name your process ‘FSSK Clone: Service Appointment’.
8. Enter an API name, and description.
9. Click Save.
10. Click Edit Properties.
11. Uncheck the Template checkbox field.
12. Click Save.
13. Scroll to the bottom of the page and click Add Criteria
  - a. For Criteria Name type ‘Set Add Asset to MP field’
  - b. For Criteria for Executing Actions keep the ‘Conditions are met’ default selection.
  - c. Enter the following conditions:
    - i. Row 1:
      1. Field → [ServiceAppointment].Work.Type.Name
      2. Operator → Contains
      3. Type → String
      4. Value → Install
    - ii. Row 2:
      1. Field → Add Asset To Account Maintenance Plan
      2. Operator → Equals
      3. Type → Boolean
      4. Value → False
  - d. For Conditions keep the default selection of ‘all of the conditions are met (AND)’
  - e. Click Save.
  - f. **Drag the Criteria node to the top (so it is the first Criteria in the process).**
  - g. **Click on the STOP terminal and change the selection to ‘Evaluate the next criteria’ and click save.**
  - h. Click Add Action.
    - i. For Action Type select *Update Records*.
    - ii. For Action Name type ‘Set Add Asset to MP checkbox’.
    - iii. For Record Type → Select the ServiceAppointment record that started your process.
    - iv. For Criteria for Updating Records → keep the default selection of No criteria—just update the records!
    - v. Set the following field value:
      1. Field → Add Asset To Maintenance Plan
      2. Type → Boolean
      3. Value → True
    - vi. Click save.
  - i. Click Activate. In the Pop-up click Confirm.

## 8. Field Service users automation

When user records are created, this feature automatically assigns Field Service permission sets to users. If the user is a field worker, a service resource record will be automatically created as well. The starter kit package introduces a new field, which triggers the process. This feature is not based on a flow, but rather an Apex trigger and validation rules.

When an admin creates or updates user records, the SFS Resource Type field on the user object allows the admin to assign permission sets to the user and determine whether a Service Resource record should be created and associated to the user as well.

The table below illustrates the different options available

SFS Resource Value	User License Needed	Permission Sets assigned	Resource record is created?
Resource (With Mobile)	Salesforce	Field Service Resource Licence Field Service Resource Permissions Field Service Mobile Licence	Yes
Resource (Without Mobile)	Salesforce	Field Service Resource Licence Field Service Resource Permissions	Yes
Dispatcher	Salesforce	Field Service Dispatcher Licence Field Service Dispatcher Permissions	No
Resource & Dispatcher (With Mobile)	Salesforce	Field Service Resource Licence Field Service Resource Permissions Field Service Mobile Licence Field Service Dispatcher Licence Field Service Dispatcher Permissions	Yes
Resource & Dispatcher (Without Mobile)	Salesforce	Field Service Resource Licence Field Service Resource Permissions Field Service Mobile Licence Field Service Dispatcher Licence Field Service Dispatcher Permissions	Yes
Contractor Dispatcher	Customer Community Plus / Partner Community	Field Service Community Dispatcher Licence Field Service Community Dispatcher Permissions	No

**NOTE:** The feature supports both the creation of new users and the updating of existing user records. However, it will NOT delete existing user records and will not deactivate them either when modifying their existing records. Therefore, if a user was created with a resource picklist value and then updated to a dispatcher picklist value, then the resource record that was added will not be deleted but will remain active.

## How to Enable:

1. **Go to the Field Service Starter Kit Settings tab and enable the feature:**
  - a. In the General Flows section, check the box next to the **Field Service users automation** feature.
2. **Add SFS Resource Type to the User Page Layout that is in use**

## Considerations:

- Make sure your organization has the necessary number of available permission site licenses (PSLs) for the users you are creating or updating. If a PSL is missing the user creation/update will succeed, but permission sets referencing licenses unavailable will not be added.
- If a user creation fails, a text file containing the relevant error from the log is sent to the email of the user that performs the action.

## Validation Rules

The package includes 3 validation rules:

1. FSK User Creation Feature Inactive
  - a. The validation rule prevents the insertion of new records if the SFS Resource Type field is filled out but the Field Service users automation feature is not turned on. This validation was added to prevent situations in which the administrators intended to use the feature to assign permission sets and to create service resources for the users they are creating, but they were unaware that it was deactivated.
  - b. Error message: SFS Resource Type should only be used when the Field Service users automation feature in the Field Service Starter Kit Package is activated.
2. FSK User Type Is Not Community
  - a. The validation rule ensures that the admin can only select the *Contractor Dispatcher* (*Community Dispatcher*) value if the user record is of community type.
  - b. Error message: This SFS Resource Type value should only be used for community user records
3. FSK User Type Is NotStandard
  - a. The validation rules prevent the admin from selecting the *Contractor Dispatcher* (*Community Dispatcher*) value if the user record is not of a community type.

- b. Error Message: This SFS Resource Type value should only be used for users with a Salesforce user license

**NOTE:** you can deactivate these validation rules from the User object management settings

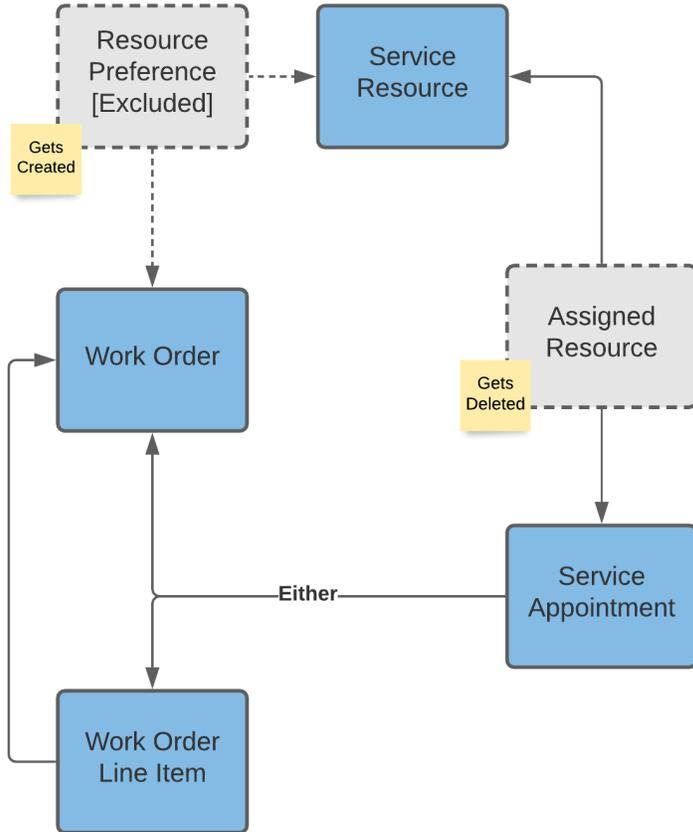
## 9. Exclude service resources upon service appointment rejection

This feature adds assigned resources as excluded resources to the Work Order in case they reject the assignment given to them. The flow unschedules the Service Appointment and deletes the assigned resource record by updating the Service Appointment Status to None. The Reject Service Appointment checkbox field that the package introduces is triggering the flow. You can use the feature for appointments that are either parented by a Work order or a Work Order line item. Make the Excluded Resources work rule a part of your scheduling policy, so automated scheduling won't consider that resource as a candidate again.

### See Also

[Salesforce Help: Add Service Resource Preferences to Accounts or Work Orders for Field Service](#)

[Salesforce Help: Work Rule Type: Excluded Resources](#)



**Entry Criteria:**

*NOT(ISNEW()) && FSSK\_\_FSK\_Reject\_Service\_Appointment\_\_c == True && Service Appointment Parent is Either Work Order or Work Order Line Item*

**How to Enable:**

**Go to the Field Service Starter Kit Settings tab and enable the feature:**

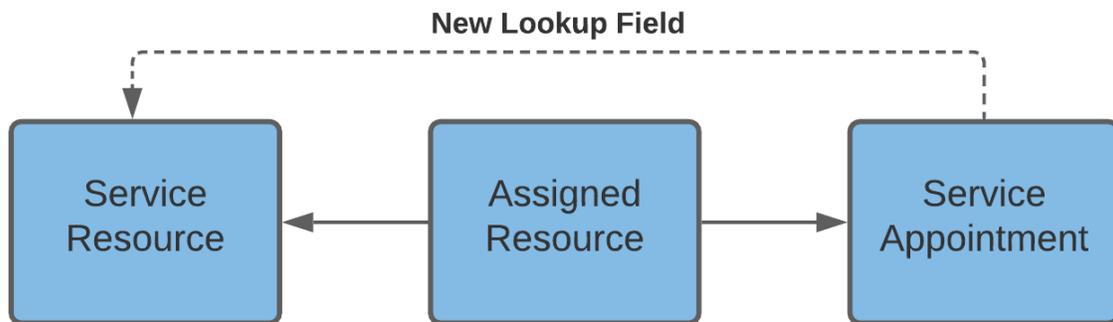
- a. In the General Flows section, check the box next to **Exclude service resources upon service appointment rejection** feature.

**Considerations:**

- In case the Work Order has already a Resource Preference record for the assigned resource (of type Preferred or Required) the flow will not be able to create the Excluded resource preference record, but the Service Appointment will be removed from the Assigned Resource.
- The Flow sets the Reject Service Appointment checkbox field back to False at the end of the process.

## 10. Populate the Service Resource Lookup field on the Service Appointment Record

The Assigned Resources related list under a service appointment supports multiple assignees working on the same appointment as when the appointment was assigned to a service crew. Some companies are mostly assigning one field worker for every job, and in these cases the related list is not needed. The related list may even pose some difficulties when there is a need for quick reporting, or for some automation. These things are much easier to implement when the information is kept on the service appointment record itself and not on a child record. The package is adding the **Assigned Service Resource** lookup field on the service appointment object and this feature is populating the field with the relevant service resource ID.



### Entry Criteria:

*Assigned Resource record gets updated && Service Appointment Status mapped to either the Scheduled or Dispatched status categories*

## How to Enable:

Go to the **Field Service Starter Kit Settings** tab and enable the feature:

- a. In the General Flows section, check the box next to **Populate the custom Service Resource Lookup field on the Service Appointment Record** feature.

## Considerations

1. When multiple resources are assigned to the service appointment, the following logic will apply:
  - a. One service resource - the service resource ID will be populated on the field.
  - b. Multiple services Resources - the field will remain blank.
  - c. Multiple Service Resources with one Service Crew - The ID of the Service Resource of type crew will be populated on the field.
  - d. Multiple Service Crews - the field will remain blank.
2. If an appointment is canceled (its status value maps to the Canceled status category) or gets unscheduled (its status value is mapped to None status category), the Assigned Service Resource field will get a blank value.

## 11. Set a custom Work Order lookup field to the Service Appointment's Parent ID

Service Appointment Parent Record is a polymorphic field, meaning it allows the service appointment to be linked to parents from multiple objects. While this may be useful to some companies, others that rely on Work Orders as the parent record, prefer the standard functionality of the non-polymorphic field. The reason is that lookup fields are better supported by optimization features such as formula fields and process builders. This package contains a custom Work Order lookup field that is copied from the parent field and added to the custom field.

### Entry Criteria:

*ISNEW()* && *Service Appointment Parent is a Work Order*

## How to Enable:

**Go to the Field Service Starter Kit Settings tab and enable the feature:**

- a. In the General Flows section, check the box next to **Set a custom Work Order lookup field to the Service Appointment's Parent ID** feature.

## 12. Automatically set the Gantt Label field

Quickly surface the most important details on the service appointment block on the Gantt chart. With this flow, the Gantt Label field is automatically populated with the Customer name and work type. The feature is only supported for service appointments which have a parent work order record. In case the Work Order's Account and/or Work Type fields get updated, the service appointment Gantt Label fields will reflect the new fields values.

## How to Enable:

**Go to the Field Service Starter Kit Settings tab and enable the feature:**

- a. In the General Flows section, check the box next to **Automatically set the Gantt Label field** feature.

## 13. Service Resource deactivation automation

Using this feature, Field Service licenses are removed from users automatically when the corresponding Service Resource record is deactivated. The flow ensures that all the standard Salesforce Field Service permissions sets and all Salesforce Field Service licenses are removed.

**How to Enable:**

**Go to the Field Service Starter Kit Settings tab and enable the feature:**

- b. In the General Flows section, check the box next to the **Service Resource deactivation automation** feature.