

AssetOptics for Salesforce Field Service Installation Instructions

AssetOptics for Salesforce Field Service is a 100% native Force.com managed package that extends the asset management and MRO inventory management found in Salesforce Field Service. It also provides purchasing features to automatically replenish Product Item inventory based on product availability and minimum stocking quantities.

This guide provides the steps to install the AssetOptics managed package and to perform the base configuration steps.

Pre-Installation Steps.

1. Ensure Notes are enabled in the Org.
 - a. *Setup > Feature Settings > Sales.*
 - b. Check Enable Notes and Save.
2. Ensure Field Service is Enabled.
 - a. *Setup > Service > Field Service > Field Service Settings*
 - b. Toggle Enabled on Field Service.
3. Ensure a Field Service Standard permission set license is assigned to the installing System Administrator.

Install the managed package from the AppExchange.

1. From the AssetOptics for Salesforce Field Service AppExchange listing, click the **Get It Now** button.
2. Install for System Administrators only (*user access is provided by an included Permission Set*)

Post-Installation Steps.

1. Enter Custom Settings
 - a. Setup > Custom Code > Custom Settings
 - b. Product Request Record Type
 - i. At the Default Organization Value Level, create a new record and enter a value of *Master* in the Record Type Name field.
 - c. Serialized Inventory Parameters
 - i. At the Default Organization Value Level, create a new record accepting the default values.
2. Add four new values to the Status field on the Asset object (these are the values that we accepted as the defaults in the Serialized Inventory Parameters Custom Setting.
 - a. Pending Install
 - b. Pending Transfer
 - c. Idle
 - d. Stock Inventory
3. Assign Page Layouts (if you have custom page layouts on these objects, please update accordingly – these are standard page layouts, not Lightning record pages).

a. Asset	AO Asset Ver 1.1
b. Location	AO Location Ver 1.1
c. Product Consumed	AO Product Consumed Ver 1.1
d. Product Request Line Item	AO Product Request Line Item Ver 1.1
e. Product Request	AO Product Request Ver 1.1
f. Product Required	AO Product Required Ver 1.1
g. Product	AO Product Ver 1.1
h. Work Type	AO Work Type Ver 1.1
i. Work Order	AO WorkOrder Ver 1.1
j. Product Item	AO Product Item Ver 1.1
4. Add the Planned Product Cost field to your existing Work Order Line Item page layout(s).
5. Activate Lightning Record Pages (Assuming that do not have custom record types on any of the following objects, these record pages can be assigned at the org default level. If you have

custom record types on these objects OR if you have custom Lightning record pages, please update accordingly).

- | | |
|------------------------------|--|
| a. Account | AO Account Record Page |
| b. Asset | AO Asset Record Page |
| c. Location | AO Location Record Page |
| d. Product Item | AO Product Item Record Page |
| e. Product | AO Product Record Page |
| f. Product Request Line Item | AO Product Request Line Item Record Page |
| g. Product Request | AO Product Request Record Page |
| h. Product Required | AO Product Required Record Page |
| i. Work Order Line Item | AO Work Order Line Item Record Page |
| j. Work Order | AO Work Order Record Page |

6. Schedule Batch APEX Jobs

- Setup > Custom Code > Apex Classes.* Click the Schedule Apex command button.
- ScheduleProductRequestLineItemBatch – This batch APEX job evaluates Reserve By Date (date/time) field on the Product Request Line Item and reserves the Product Item inventory if required. This job needs to be scheduled a minimum of once per day (recommend midnight) and more frequently depending upon the nature of your inventory planning and picking process.
- There are two additional batch APEX jobs to schedule, one for the automatic creation of Purchase Requisitions and one for Transfer Orders. Please consult with AssetOptics support as the frequency is highly dependent upon your business process.

- Update Unit of Measure picklist values on the Product and Product Item objects. The master list of Units of Measure can be found on the Picklist Value Set labeled *UOM*. Set *EA – Each* as the default value.
- Update the Product Item search layout for Salesforce Classic to include the Generate PO and Generate TO buttons on the Product Item list views.