

Implement Salesforce Field Service

Duration: 3 Days Course Code: FSL-201

Overview:

In this expert-led class, you'll learn what's needed prior to setting up Salesforce Field Service, as well as the steps it takes to successfully implement it for your organization. Plus, you'll get hands on with an implementation. Discover how Salesforce Field Service can help your organization resolve field service calls faster and boost employee productivity in the field.

Target Audience:

This course is recommended for Implementation Consultants and Salesforce Administrators working either with or for organizations deploying Field Service Lightning. You should have a solid understanding of Salesforce Administrator functionality and concepts prior to attending this course.

Objectives:

- Walk through the process of setting up Field Service Lightning.
 - Explain Salesforce Field Service and its components, capabilities, and data models.
 - Know the right questions to ask prior to implementing Field Service Lightning.
 - Utilize the Dispatcher Console.
 - Understand how field technicians manage service appointments using the Field Service mobile app.
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Content:

Course Orientation

- Course Introduction
- Certification Overview
- Field Service Definitions and Video

AW Computing Overview

- Explain the Business Reason Why AW Computing Has Purchased FSL
- Describe the Framework for a Field Service Project Team
- Reference Your Action Items for the Course

FSL Overview

- Identify Field Service Management Challenges and Determine How Field Service Can Overcome Those Challenges and Meet KPIs
- Describe What Connected Field Service Looks Like
- Complete Prerequisite Exercises
- Explain the Main Components, Capabilities, and Data Model of FSL

FSL Initial Configuration

- Identify the Features Within the Field Service Settings Tab
- Identify the Permission Sets We Assign to Each License, the Profiles and Permission Sets We Assign to Our Users, and Why We Do This
- Describe Geocoding and Data Integration Rules Within Field Service
- Complete Prerequisite Exercises

Plan for FSL

- Ask the Essential Questions Before Setting up Field Service

FSL Main Elements

- Set up All Field Service Main Elements
- Define Operating Hours
- Explain Service Territories
- Recognize the Importance of Required Skills
- Discuss How Work Orders Behave and Interact with Other Objects
- Explain the Service Resources Data Flow
- Describe the Field Service Location and Product Data Flow

FSL Scheduling and Policies

- Complete All Exercises Related to Field Service Scheduling and Policies
- Identify Work Rules and Service Objectives
- Identify Scheduling Policies Included in Field Service
- Define the Difference Between the Service Appointment and Work Order

FSL Contractors

- Complete All Exercises Related to Contractors
- Explain Capacity with Contractors and How to Give Contractors First Preference
- Describe the Service Appointment Lifecycle and Related Status Transitions

Dispatcher Console

- Complete All Exercises Related to the Dispatcher Console
- Explore the Capabilities of the Dispatcher Console
- Book and Manage Service Appointments
- Track and Monitor Service Resources
- Describe the Schedule Optimization Model

Mobile Field Technicians

- Explain the Business Flow of a Case to Work Order to Service Appointment
- Identify the Key Tasks Performed by Each Field Service Role (Customer, Agent, Dispatcher, Field Tech, and Admin)
- Describe How Field Technicians Manage Their Service Appointments Using the Field Service Mobile App
- Complete Reporting and Mobile Exercises

Review and Resources

- Test Your Knowledge with Field Service Review Questions
- Access Field Service Resources

Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

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