**1.** ENABLE FIELD SERVICE SETTING

**2.** USER

**3.** CREATE SR -> USER(lookup), Type, Active

**4.** OPERATING HOURS -> name, TimeZone

**5.** Service Territory -> Name, Lookup(Operating Hour), Active

**RELATED LIST**

-----------

Service Territory Member -> Service Resource, Service territory, Date, Time

**6.** CREATE SKILL

Add SKILL To SR related List "SKILL RELATED LIST"

**7.**CREATE PRODUCTS -> Name, Activity

**8.** Create LOCATION -> Name, TYPE, Checkbox(INVENTORY lOCATION)

Related List

------------

Product Item -> Name, Quantity, Location(Lookup)

**9.** WORK TYPES - NAME, CHECKBOX(Auto-Create), ESTIMATED Duration

**Related List**

------------

ADD

SKILL REQUIRED(related List)

REQUIRED PRODUCT (related List) - Product(Lookup),Quantity

**10.** WORK ORDER ------> UPDATE **PAGE LAYOUT** -> WT field, Product Required, Product Consumed

Create WO -> ------> WorkType (Lookup), Status, Priority

**Related List**

------------

'SERVICE APPOINTMENT' ---> UPDATE ----> Status, DUE DATE, Schedule Start Date (between start and duedate)

**Related List**

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ASSIGNED RESOURCE --> SERVICE RESOURCE(lookup USER)

**11.** WORK ORDER LINEITEM(subtask)

**------------------------------------XXXX PHASE 1 XXXX--------------------**

**TECHNICIAN COMPLETES THE JOB**

**1.** Update SERVICE APPOINTMENT - Status

**PARENT OBJECT(WO)**

**------------------**

**Related List** (PRODUCT CONSUME) ---> Quantity

**2.** CREATE A SERCVE REPORT TEMPLATE

Setup ---> Service Report Template ----> NEW

**CREATE REPORT FROM WO QUICK ACTION**

**--------------------------- MANAGED PACKAGE -------------------**

FS Admin

FS

**https://fsl.secure.force.com/install**

**1.** ENABLE: FSL PERMISSION SET

**We Created 3 PEOPLE:**

**ADMIN :** - assign PB by Setup ----> Permission set ---> "FSL Admin Permissions" ---> Manage Assignment :- ---> Add Assignments---> Select Yourself

**DISPATCHER**

**SERVICE RESOURCE**

**Mobile Applicayion**

https://apps.apple.com/us/app/field-service-lightning/id1163307568