

Today's field service management options can be challenging to navigate. Service agents, dispatchers, technicians, and managers are held back by siloed teams and disconnected processes. They are slowed down by inefficient scheduling and systems that can't keep pace with fast-changing businesses and industries.

Not only does this lead to lower productivity among employees in the field, it also results in higher costs and poor customer experiences. In this new connected world, customer experience is now the #1 factor that your customers are using to make decisions about your products versus your competition. This means your products and your brand are only as good as the complete customer service you provide. That complete customer experience can only be delivered when your company connects employees, processes, and systems on one platform. Give agents, dispatchers, mobile employees, and managers a 360-degree view of the customer, full context into cases, and access to all the information needed to solve the problem anytime and on any device.

Challenges facing field service management today

1 Siloed departments

Lack of communication between key departments makes it difficult for mobile employees to deliver amazing, on-site customer experiences. Service teams and department processes are disconnected, which leads to lower employee productivity, higher costs, and poor customer satisfaction.

3 Disconnected from CRM

Employees across the company aren't connected to all the data they need to quickly resolve service issues. They are too often bogged down by massive amounts of disparate information trapped in paperwork, email, spreadsheets, or on-premises systems that are hard to track. These outdated processes are difficult to scale and keep information secure. They also limit visibility into how and where service technicians are being assigned, and don't pull in or analyze data needed to make critical service decisions.

2 Poor resource allocation

Field service depends on excellent time management and efficient resource allocation. With manual field service processes and disconnected systems, companies suffer from effectively sourcing technicians, assigning tasks based on skills, and tracking parts and inventory, leading to costly errors and use of resources.

4 Lack of mobile support

Traditional platforms are too rigid to keep pace with your changing business, and don't support employee collaboration across devices, making it difficult to put the right tools at your field technicians' fingertips. Mobile employees are struggling to access the right information.



From intelligent scheduling, to accessible work orders on the go, to visibility into service operations, Field Service Lightning is ready to hit the road.



Streamline operations across the entire service chain on one platform to deliver a connected customer experience with Field Service Lightning.

Field Service Lightning is built on Service Cloud, the world's #1 customer service platform. It lets you connect your entire workforce on one platform to get a complete view of the customer and collaborate to optimize customer experience from the phone to the field.

With Field Service Lightning, you can transform the connected customer experience, and equip your agents, dispatchers, and mobile employees with the tools they need to deliver a powerful customer experience anytime, anywhere, and via any mobile device.

Create and track work orders.

Quickly create work orders and schedule truth-based appointments right from the Service Console. Work orders can also be associated with accounts, contacts, entitlements, cases, or service contracts. Appointments and work orders are accessible via the Field Service Lightning mobile app, so employees know what to do and when they need to do it. Work-order line items take work orders even further by letting you track details about the tasks required to complete the work order.

View and manage jobs in real time.

The Field Service Lightning dispatcher console lets dispatchers seamlessly manage and monitor your mobile workforce to improve its efficiency and productivity in the field. Now you can ensure the right job is routed to the right mobile employee, and immediately see alerts for issues that need attention and take action. The dispatcher console helps you intelligently track and monitor service delivery in real time on a map or Gantt chart, giving you better visibility and control of what's happening in the field.

Seamlessly access information on the go.

Mobility is an integral part of any field service operation, and with the Field Service Lightning mobile app, remote employees can increase their efficiency and productivity in the field. The mobile solution provides access to critical information regardless of connectivity, and uses automated processes to support a full range of field activities, from sending and receiving real-time job updates to managing work orders and speeding up manual administrative work. It even enables users to generate reports, access knowledge articles, update parts required, and capture a customer's signature.

Get advanced asset management.

Manage complex assets with the multitiered asset hierarchy. Track information about all of your customers' products, get insight into which customers have a competitor's product, and leverage an asset hierarchy to track products made up of several components in one view. Advanced asset management makes it easier to identify which parts of an asset need repair, helping field technicians deliver more accurate service, faster.

Schedule work intelligently.

With Smart Scheduling, you can instantly book service appointments from Lightning Console and even allow customers to self-book an appointment at their convenience. Smart Scheduling increases employee productivity by automatically assigning appointments to the right technician based on time, skills, location, and business rules.

Connect to actionable analytics.

Field Service Wave Analytics* lets you integrate all of your business data into one easy-to-use application, giving you a complete view of your mobile workforce. Drill into key operational data, right down to the record, and take action right from the app, resolving cases quicker and delivering a connected customer experience. Managers can optimize the performance of technicians with key field service KPIs, and identify trends and problems early. Access field service intelligence, to deliver proactive customer service for every on-site experience.

* Purchased separately

Salesforce Field Service Lightning User License Comparison

Deliver end-to-end service with Service Cloud and Field Service Lightning. Choose the edition that's right for your business.

Field Service Lightning Features – Delivered via Managed Package

	Service Cloud			Field Service Lightning Dispatcher ¹		Field Service Lightning Technician ²	
	PE	EE	UE	EE	UE	EE	UE
The FSL features in Service Cloud are only included with the purchase of FSL licenses.							
Appointment booking		✓	✓	✓	✓	✓	✓
Scheduling				✓	✓		
Dispatcher Console**				✓	✓		
Optimization				✓	✓		
Self-scheduling						✓	✓
Ability to be scheduled and optimized						✓	✓
Access to FSL Mobile App (iOS)				✓	✓	✓	✓
Access to FSL features through SF1	✓	✓	✓	✓	✓	✓	✓

Service Cloud Features

Service Console**	1	✓	✓	✓	✓	✓	
Case management	✓	✓	✓	✓	✓	✓	✓
Work order management	✓	✓	✓	✓	✓	✓	✓
Account, contact, and lead management	✓	✓	✓	✓	✓	✓	✓
Web and email case capture	✓	✓	✓	✓	✓	✓	✓
Case auto-assignment	✓	✓	✓	✓	✓	✓	✓
Case email auto-response	✓	✓	✓	✓	✓	✓	✓
Case escalation rules and queues	✓	✓	✓	✓	✓	✓	✓
Omni-channel routing (basic)	✓	✓	✓	✓	✓	✓	✓
Case team collaboration		✓	✓	✓	✓	✓	✓
Service contract management	✓	✓	✓	✓	✓	✓	✓
Service entitlements	✓	✓	✓	✓	✓	✓	✓
Asset management and product tracking	✓	✓	✓	✓	✓	✓	✓
Visual SLA timer	✓	✓	✓	✓	✓	✓	✓
Social Customer Service starter pack	✓	✓	✓	✓	✓	✓	✓
Order management	✓	✓	✓	✓	✓	✓	✓
Customizable dashboards and reports	✓	✓	✓	✓	✓	✓	✓
Mobile access, customization, and admin	✓	✓	✓	✓	✓	✓	✓
CTI integration	✓	✓	✓	✓	✓	✓	✓
Call scripting		✓	✓	✓	✓	✓	✓
Email templates and tracking	✓	✓	✓	✓	✓	✓	✓
Email integration with Outlook	✓	✓	✓	✓	✓	✓	✓
Google Apps integration	✓	✓	✓	✓	✓	✓	✓
Chatter collaboration	✓	✓	✓	✓	✓	✓	✓
Task and activity tracking	✓	✓	✓	✓	✓	✓	✓
AppExchange app integration*	✓	✓	✓	✓	✓	✓	✓
Role permissions	2	✓	✓	✓	✓	✓	✓
Custom profiles and page layouts	2	✓	✓	✓	✓	✓	✓
Record types (per object)	3	✓	✓	✓	✓	✓	✓
Processes (per org) via Process Builder	5	✓	✓	✓	✓	✓	✓
Workflow and approval automation		✓	✓	✓	✓	✓	✓
Visual workflow		✓	✓	✓	✓	✓	✓
Integration via Web services API	\$	✓	✓	✓	✓	✓	✓
Analytics snapshots	✓	✓	✓	✓	✓	✓	✓

Service Cloud Features (Cont.)

	Service Cloud			Field Service Lightning Dispatcher ¹		Field Service Lightning Technician ²	
	PE	EE	UE	EE	UE	EE	UE
Advanced reporting		✓	✓	✓	✓	✓	✓
Custom websites		✓	✓	✓	✓	✓	✓
Lightning App Builder	✓	✓	✓	✓	✓	✓	✓
24/7 toll-free support	\$	\$	✓	\$	✓	\$	✓
100+ administration services	\$	\$	✓	\$	✓	\$	✓
Unlimited online training	\$	\$	✓	\$	✓	\$	✓
Knowledge read-only	\$	✓	✓	✓	✓	✓	✓
Knowledge read-write	\$	\$	✓	\$	✓	\$	✓
Suggested knowledge articles	\$	✓	✓	\$	✓	\$	✓
Multilingual knowledge	\$	✓	✓	\$	✓	\$	✓
Live Agent Web chat		\$	✓	\$	✓		
Live video chat (SOS)		\$	\$	\$	\$	\$	\$
Customer Community		\$	\$	\$	\$	\$	\$
Partner Community		\$	\$	\$	\$	\$	\$
Advanced Social Customer Service	\$	\$	\$	\$	\$	\$	\$

Cross-Selling & Upselling Features

Leads	✓	✓	✓	✓	✓	✓	✓
Quotes							
Sales Contracts							
Opportunities	✓	✓	✓	✓	✓	✓	✓

Platform Features of Each Edition

Partial Sandbox		1	1	1	1	1	1
Full Sandbox		\$	1	\$	1	\$	1
Developer Sandbox	10	25	100	25	100	25	100
Developer Pro Sandbox	\$	\$	5	\$	5	\$	5
Data storage per user***	20 MB/ User	20 MB/ User	120 MB/ User	20 MB/ User	120 MB/ User	20 MB/ User	120 MB/ User
File storage per user***	612 MB/ User	2 GB/ User	2 GB/ User	2 GB/ User	2 GB/ User	2 GB/ User	2 GB/ User
Custom applications and tabs	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited

✓ Included in base user license.

\$ Additional fee applies.

¹ Requires at least one (1) Service Cloud user license per org

² Requires at least one (1) Dispatcher user license per org

* Available as a downloadable application via AppExchange.

** Dispatcher license may not be used for a contact center, call center, or customer case management application.

*** All editions include a minimum of 1 GB data and 11 GB of storage shared by all users.

Additional data storage is available on a per-org basis for each edition.

For More Information
Contact your account executive to learn how we can help you accelerate your CRM success.

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