

# IMPLEMENTING FIELD SERVICE LIGHTNING



## OVERVIEW

In this hands-on course, you will learn about Field Service Lightning components and even have the opportunity to implement Field Service Lightning for AW Computing, our fictitious company. Through discussion and interactive exercises, you will discover details of Field Service Lightning functionality, what you need to know prior to setting it up, and the steps required to successfully implement it.

## WHO SHOULD TAKE THIS COURSE?

This course is recommended for Implementation Consultants and Salesforce Administrators either working 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.

## WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Walk through the process of setting up Field Service Lightning.
- Explain Field Service Lightning 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 Lightning mobile app.

## PREREQUISITES

You should have the following experience before attending this class:

- Attainment and maintenance of the Salesforce Administrator Certification.
- Working knowledge of the Service Cloud.



### DURATION

- 3 days

### DELIVERY FORMAT

- Classroom
- Virtual Classroom

### AUDIENCE

Experienced Salesforce Administrators

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## MODULES & TOPICS

### Module 1: Course Orientation

- Course Introduction
- Certification Overview
- Field Service Lightning (FSL) Definitions and Video

### Module 2: Welcome to AW Computing

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

### Module 3: FSL Overview

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

### Module 4: Set Up 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 FSL
- Complete Prerequisite Exercises

### Module 5: Plan for FSL

- Ask the Essential Questions Before Setting up FSL

### Module 6: Set Up FSL - Main Elements

- Set Up All FSL 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

### Module 7: Set Up FSL - Scheduling and Policies

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

### Module 8: Set Up 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

### Module 9: Explore the 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

### Module 10: Go Mobile with 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 FSL Mobile App
- Complete Reporting and Mobile Exercises

### Module 11: Review and Resources

- Test Your Knowledge with FSL Review Questions
- Access FSL Resources



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