
Field Service Lightning Overview



Buntaiste

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Introduction

What is Field Service Lightning?

Field Service Lightning has been created by Salesforce specifically for companies with mobile employees and/or contractors, providing service to the customers directly onsite.

It is a solution designed as part of Service Cloud, which is available since 2016.

Field Service Lightning is installed as two separate parts: Managed Package and Mobile app package. FSL mobile application is available both for Android and iOS platforms.



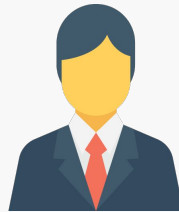
Introduction

Users of the solution



Administrator

Configures Field Service Lightning: installs packages, sets up features, assigns user permissions



Agents

Deal directly with customer inquiries, questions, complaints, take customer service calls
Desktop Users
Create Work Orders, generate Service Appointments



Dispatchers

Organise the schedules and manage appointments, controls technicians workload
Desktop Users



Technicians

Customer-facing employees, work on-site
Mobile user
Manage/update work progress in the FSL app

Problems of Target Audience

What are the pain points of Field Service Businesses?



Pains of Technician teams:

- Low first-time resolution rate
- Underloaded resources
- Lack of mobile Capabilities
- Non-real-time order information
- Disconnected from CRM



Agents/Dispatchers:

- Insufficient analytics
- Difficult coordinating and scheduling process
- Small amount of information about the customer



Pain points of Clients:

- Long wait time
- Unresolved repairs
- Reduced CSAT(Customer Satisfaction Score)
- High service costs
- Poor charge processes

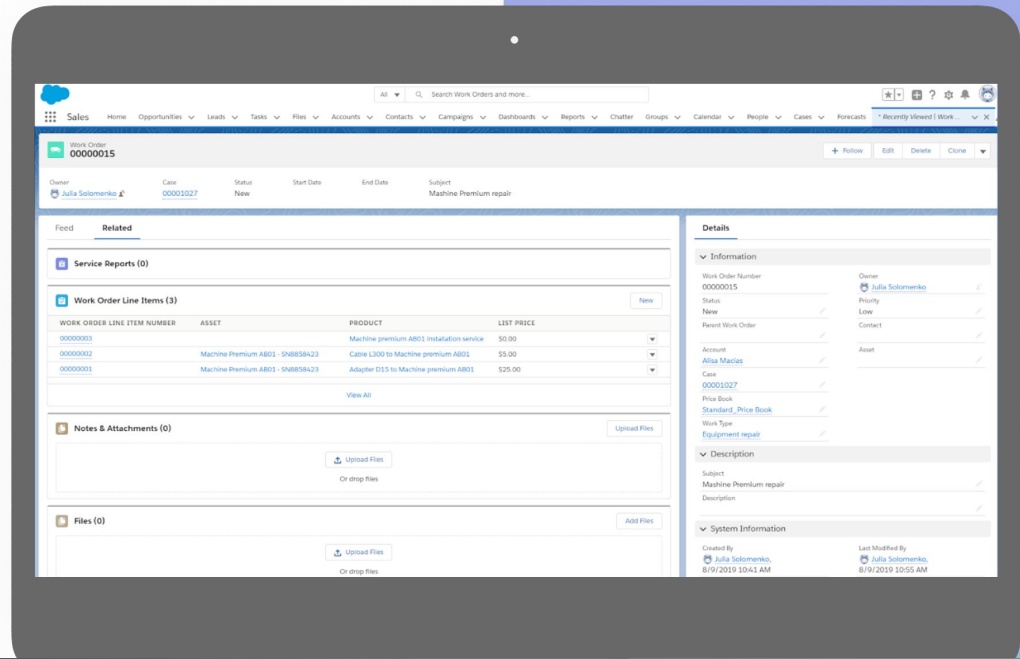
Key Field Service Lightning Features

Work Order Management

FSL Managed Package adds several objects to the standard data model such as Work Order, Service Appointment, Asset, Maintenance Plan, etc.

That enhancement enables an efficient tracking of repairs, standard maintenance, inventory spending or other work in the field.

FSL allows managing 3rd party field service employees - contractors. The greatest thing is that solution makes it possible to schedule technicians on the same platform, dispatch them and also to grant mobile access to contractors.

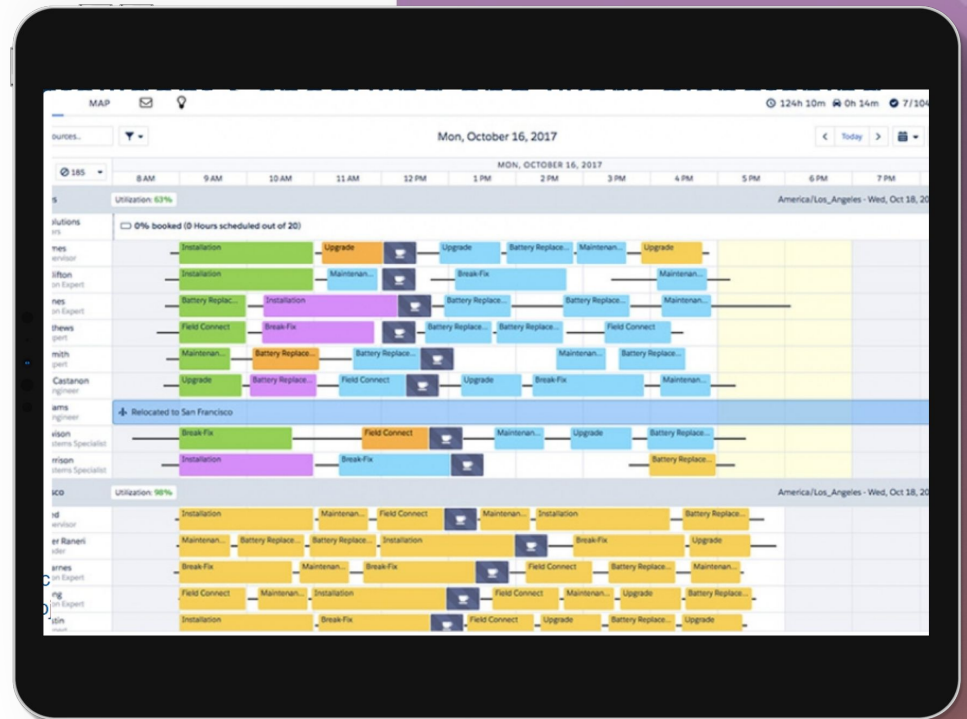


Key Field Service Lightning Features

Intelligent Scheduling and Work dispatching

Schedule Optimization feature allows automatically assign work based on a set work rules, service objectives.

Dispatcher Console is available as a map or a Gantt chart and allows to manage and monitor technicians' workload from the one place in real-time.

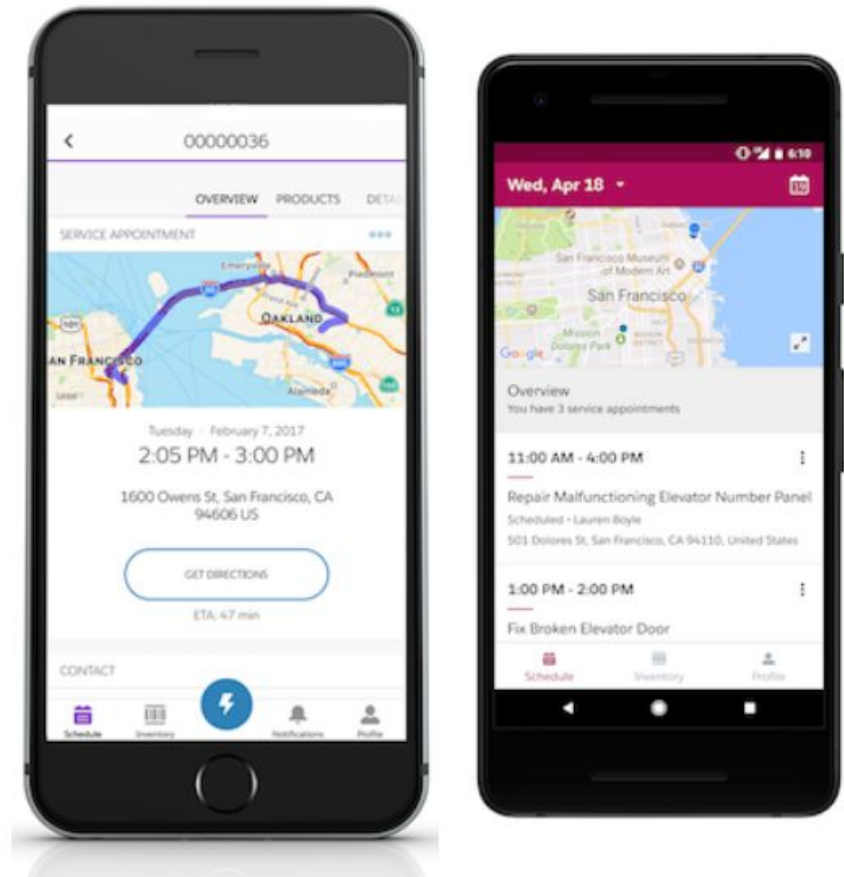


Key Field Service Lightning Features

Enhanced Mobility of Technicians with the Field Service Mobile App

Technicians have an opportunity to access and update critical information on-site with the App, such as Work Orders, Service Appointments, schedules, customer information, etc. Mobile application is also available in offline mode.

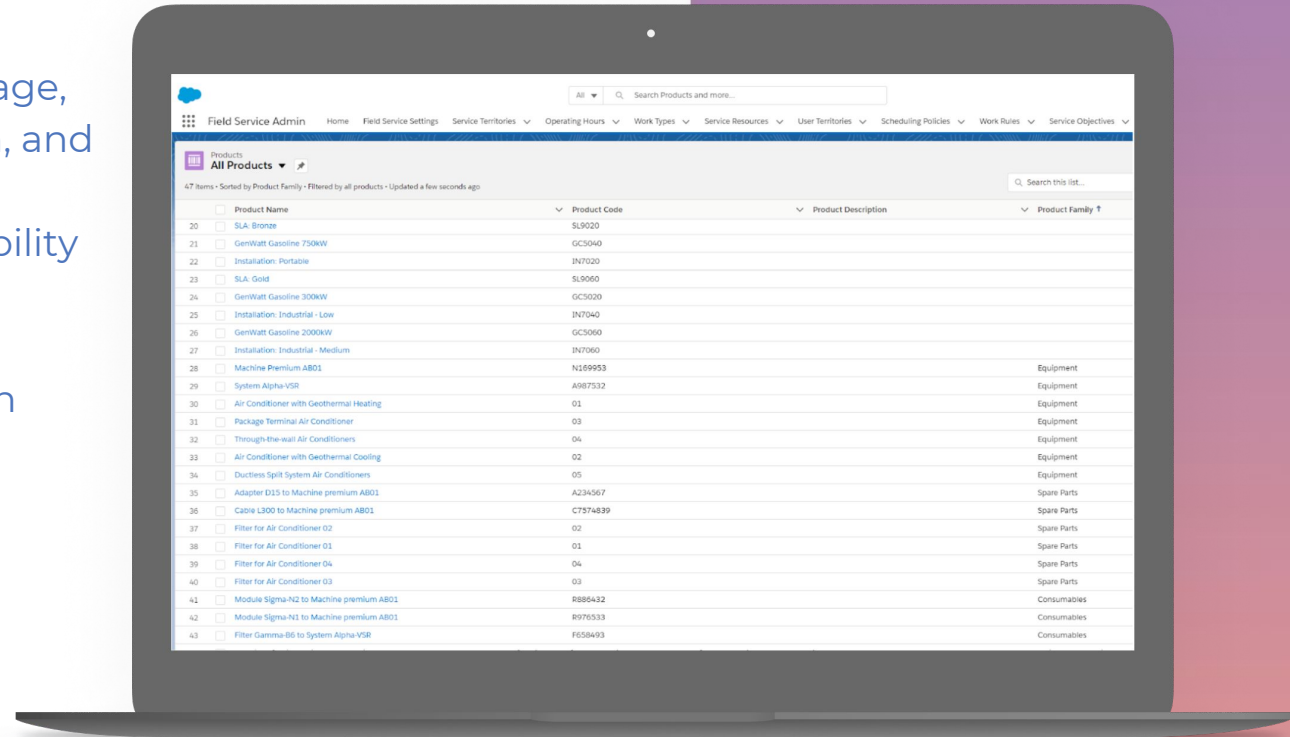
Another important option is that a technician can schedule additional visits right from the App. Work Order related documentation (Service Report) can be also approved by the customer and signed with the signature.



Key Field Service Lightning Features

Inventory Management

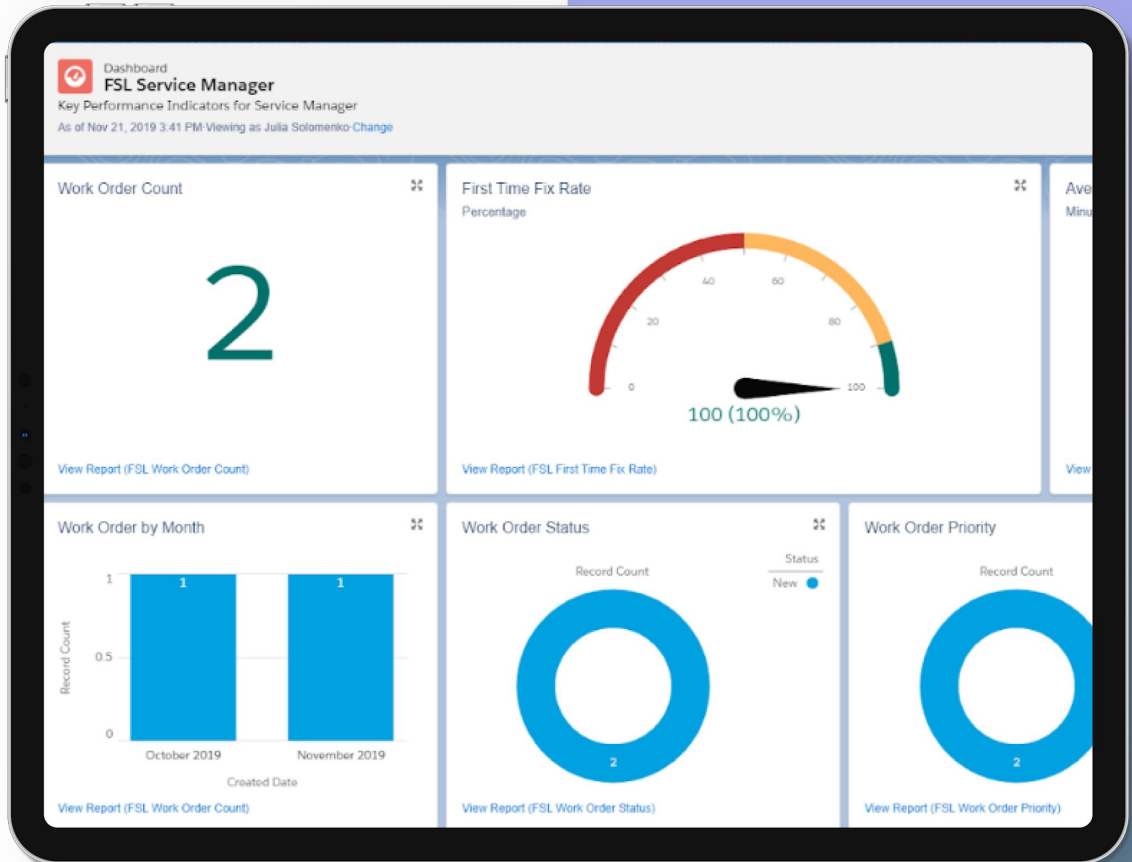
It is possible to track the storage, request, consumption, return, and retirement of items in inventory. Technicians have ability to keep their service vehicle inventory current. Inventory management is supported on both Android and iOS.



Key Field Service Lightning Features

Real-time reporting and Analytics

Analytics capabilities allow to monitor performance across the service and operation data, analyze agents, dispatchers, technicians and partner performance in a single platform



Key Field Service Lightning Structure

3 sections of Field Service Lightning

1. Core Field Service Lightning features

this part is turned on during the initial enabling of Fields Service Lightning. Administrator should navigate to 'Field Service' from 'Quick Find' box and turn on the toggle. Once switched on, an Admin can configure the core features and set-up schedules, appointments, set up the mobile app and deploy it to the mobile workforce.

2. Scheduling & Route Optimiser

once FSL is turned on, schedules and optimizing routes can be configured ('Route Optimiser' requires an additional service cloud license). "Work Rules" and "Policies" are a set of rules and objectives that guides the schedule optimizer in its decisions. These can consist of skill levels, locations, work hours, overtime reduction and even customer preference.

3. The Mobile App

here Technicians view schedules, check work orders, client addresses, and access maps to reach their destinations on their mobile devices. In terms of functionality, users can also update stock lists, report on product shelf placement, competitors and log work. Use Chatter to correspond/collaborate with others, access knowledge articles, push notifications and adjust routes in realtime from the app.

Key Field Service Lightning Benefits

Core Advantages

- ✓ Monitoring of whole Work Order lifecycle
- ✓ Complete functionality out-of-the-box
- ✓ Constantly developing Roadmap with regular releases three times per year
- ✓ Ability to strengthen the solution with other Salesforce products
- ✓ Numerous partner solutions from AppExchange

Summary

Salesforce Field Service Lightning meets specific needs of field service businesses and helps increase the productivity of agents, dispatchers, technicians and reduce the company's costs of implementation and support.

Thank You



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