

IMPLEMENT SALESFORCE FIELD SERVICE (FSL201)



OVERVIEW

Discover how to resolve field service calls faster and boost employee productivity in the field with Salesforce Field Service. In this 3-day instructor-led course, learn how to prepare for setting up Salesforce Field Service, as well as the steps it takes to successfully implement it for your organization. Plus, you'll get practical with an implementation that directly translates to your own org's setup.



WHO SHOULD TAKE THIS COURSE?

This course is designed for consultants and Salesforce administrators who are responsible for implementing Salesforce Field Service solutions for an organization. This is also a great course for anyone interested in earning their Field Service Consultant credential.

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

- Outline the process of setting up Salesforce Field Service.
- Explain Salesforce Field Service and its components, capabilities, and data models.
- Describe the Dispatcher Console.
- Illustrate how field technicians manage service appointments using the Salesforce Field Service mobile app.
- Configure common features of the Salesforce Field Service mobile app.

PREREQUISITES AND PREWORK

Students should hold the Salesforce Administrator credential or possess equivalent knowledge and have foundational knowledge of Service Cloud.

Please complete the following trailmix before attending our expert-led class: [Trailmix, Trailhead Academy](#)

IMPORTANT : If you use your personal computer and a configuration is described in the [Computer Setup Guide](#), you must complete it before attending the class.

CERTIFICATION

FSL201 is recommended to prepare Salesforce Certified Field Service Consultant. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the [Exam Guide](#). Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; If you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

Note :

- Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor
- We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided.

DURATION
3 days

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in French /
Materials in English

USER INTERFACE
Lightning Experience

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LESSONS & TOPICS

Course Introduction

- Discover the Course
- Review the Certification
- Define Salesforce Field Service

Introduction to Salesforce Field Service

- Define Field Service Components
- Understand Field Service Capabilities
- Outline its Data Model

Initial Configuration

- Navigate the Settings Tab
- Build Profiles, Licenses, Permission Sets

Main Elements

- Establish Operating Hours
- Outline Service Territories
- Generate Work Orders
- Assign Locations
- Organize Products

Scheduling

- Establish Work Rules
- Determine Service Objectives
- Apply Scheduling Policies
- Navigate the Scheduling Engine
- Schedule Service Appointments and Work Orders
- Follow the Scheduling Optimization Model

Contractors

- Assess Contractor Capacity
- Determine Scheduling Preferences
- Outline the Service Appointment Lifecycle

Dispatcher console

- Navigate the Dispatcher Console
- Manage Service Appointments
- Build a Gantt Chart and Filters

Field Technician Mobility

- Follow a Business Flow
- Determine User Roles and Tasks
- Access the Field Service Mobile App
- Generate Reports