Field Service Lightning

Managing a field service operation can be challenging. Service agents, dispatchers, technicians, and managers are often hindered by clunky and inefficient systems. Businesses are unable to meet their customers' needs and expectations. Not only does this lead to lower productivity among employees in the field, it also results in higher costs and poor customer experiences.

Agents, dispatchers, mobile employees, and managers deserve a complete view of the customer, full context into cases, and access to all the information needed to help the customer anytime, anywhere and from any device.

Challenges facing field service operations today:

1. Siloed departments
2. Poor resource allocation
3. Disconnected CRM processes
4. Lack of support in the field

68% of service executives agree field service is an important part of their customer experience strategy

72% of executives use field service management software for faster case resolution

From intelligently scheduling employees, to assigning work, to complete visibility into service operations, Field Service Lightning helps you deliver better service to customers anywhere.
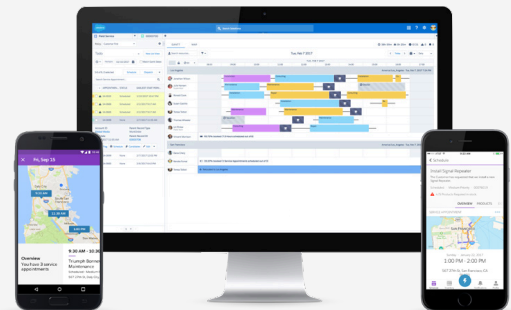
Field Service Lightning is built on Service Cloud, the world's #1 customer service platform.

With Field Service Lightning, you can transform the connected customer experience, and optimize operations across the entire service chain on one platform.

Complete visibility in real time.
Track service deliver in the field with the Dispatcher Console. Easily customize your view to a map or a Gantt chart and see real-time alerts for jobs that need attention. Also, get insight into complex assets with multitiered asset hierarchy.

Seamlessly access information on the go.
With the Field Service Lightning mobile app, mobile employees and contractors can share job updates, access knowledge articles, view and update van stock or inventory, and generate service reports from any mobile device, regardless of connectivity.

Schedule appointments and work intelligently.
Schedule truth-based service appointments and optimize jobs so that the right mobile worker is assigned to the right job. With the Salesforce Platform, you can also integrate standard and custom objects with work orders.

Connect to actionable analytics.
With Field Service Analytics,* integrate all of your service data into one easy-to-use application. Drill into key operational data and take action to resolve cases quicker and deliver a connected customer experience. Identify trends and problems early to optimize your mobile workforce.

* 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.

FSL Features – Delivered	Service Cloud		Field Service Lightning Dispatcher[1]		Field Service Lightning Technician[2]		Field Service Lightning+		Field Service Lightning Contractor[2]		Field Service Lightning Contractor+ [2]	
	EE	UE	EE	UE	EE	UE	EE	UE	EE	UE	EE	UE
The FSL features in Service Cloud are only included with the purchase of FSL licenses.												
Appointment booking	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Resource scheduling			✓	✓			✓	✓				
Dispatcher console**			✓	✓			✓	✓				
Optimization			✓	✓	✓	✓	✓	✓				
Self-scheduling					✓	✓	✓	✓	✓	✓	✓	✓
Ability to be scheduled and optimized					✓	✓	✓	✓	✓	✓	✓	✓
Field Service Lightning mobile app					✓	✓	✓	✓	✓	✓	✓	✓
Field Service Lightning features through Salesforce mobile app	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Contact center agent console**	✓	✓					✓	✓				
Case management	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Work order management	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Account and contact management	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓
Omni-channel routing (basic)	✓	✓	✓	✓	✓	✓	✓	✓				
Service contract management	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Service entitlements	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Asset management and product tracking	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Visual SLA timer	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Order management	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Customizable dashboards and reports	✓	✓	✓	✓	✓	✓	✓	✓				
CTI integration	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Email templates and tracking	✓	✓	✓	✓	✓	✓	✓	✓				
Email integration with Outlook	✓	✓	✓	✓	✓	✓	✓	✓				
Google Apps integration	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Chatter collaboration	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Task and activity tracking	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
AppExchange app integration*	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Role permissions	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Custom profiles and page layouts	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Record types (per object)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Can create workflows, automation, and approvals	✓	✓	✓	✓	✓	✓	✓	✓				
Can utilize and be part of workflows, automation, and approvals	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Integration via web services API	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Analytics snapshots	✓	✓	✓	✓	✓	✓	✓	✓				
Advanced reporting	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Custom websites	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Lightning App Builder	✓	✓	✓	✓	✓	✓	✓	✓				
24/7 toll-free support	$	✓	$	✓	$	✓	$	✓	$	✓	$	✓
100+ administration services	$	✓	$	✓	$	✓	$	✓	$	✓	$	✓
Unlimited online training	$	✓	$	✓	$	✓	$	✓				
Knowledge read-only	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Knowledge read-write	$	✓	$	✓	$	✓	$	✓				
Live Agent web chat	$	✓	$	✓			$	✓				
Live video chat (SOS)	$	$	$	$	$	$	$	$				

FSL Features – Delivered (Cont.)

	Service Cloud		Field Service Lightning Dispatcher[1]		Field Service Lightning Technician[2]		Field Service Lightning+		Field Service Lightning Contractor[2]		Field Service Lightning Contractor+ [2]	
	EE	UE	EE	UE	EE	UE	EE	UE	EE	UE	EE	UE
	The FSL features in Service Cloud are only included with the purchase of FSL licenses.											
Customer Community	$	$	$	$	$	$	$	$	✓	✓		
Partner Community	$	$	$	$	$	$	$	$			✓	✓
Advanced Social Customer Service	$	$	$	$	$	$	$					

Cross Selling & Upselling Features

	Service Cloud		Field Service Lightning Dispatcher[1]		Field Service Lightning Technician[2]		Field Service Lightning+		Field Service Lightning Contractor[2]		Field Service Lightning Contractor+ [2]	
	EE	UE	EE	UE	EE	UE	EE	UE	EE	UE	EE	UE
Leads	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓
Quotes							✓	✓			✓	✓
Sales contracts							✓	✓	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓
Sales Console template							✓	✓				
Opportunity splits							✓	✓			✓	✓
Opportunity teams	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓
Territory management							✓	✓			✓	✓
Salesforce CPQ					$	$	$	$	$	$	$	$

Platform Features of Each Edition

	Service Cloud		Field Service Lightning Dispatcher[1]		Field Service Lightning Technician[2]		Field Service Lightning+		Field Service Lightning Contractor[2]		Field Service Lightning Contractor+ [2]	
	EE	UE	EE	UE	EE	UE	EE	UE	EE	UE	EE	UE
Partial Sandbox	1	1	1	1	1	1	1	1	1	1	1	1
Full Sandbox	$	1	$	1	$	1	$	1	$	1	$	1
Developer Sandbox	25	100	25	100	25	100	25	100	25	100	25	100
Developer Pro Sandbox	$	5	$	5	$	5	$	5	$	5	$	5
Data Storage per user***	20 MB/ User	120 MB/ User	20 MB/ User	120 MB/ User	20 MB/ User	120 MB/ User	20 MB/ User	120 MB/ User	2 MB/ User	2 MB/ User	5 MB/ User	5 MB/ User
File Storage per user***	2 GB/ User	2 GB/ User	2 GB/ User	2 GB/ User	2 GB/ User	2 GB/ User	2 GB/ User	2 GB/ User	0	0	0	0
Custom applications and tabs	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	0	0	0	0

✓ 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 and Technician licenses may not be used for a contact center, call center, or customer case management application. Field Service Lightning+ may be used for those applications.

*** 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.

Note: This document includes contractual limitations which are reflected in the product terms.

For More Information
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