

# Implementing **Field Service Lightning** for Monitoring Meetings and Tracking Agents





## Our Customer

Advice Direct Scotland is an independent member of The Scottish Association of Citizens Advice Bureaux. They provide advice regarding rights to everyone in Scotland, regardless of age, background, or circumstance. They take more than 400,000 contacts annually, across their organizations, and have now amassed over 1,000,000 separate cases.

## What bothered them

- ✓ Client had a complete separate system for storing information of customers with whom they need to conduct confidential meetings on field.
- ✓ Agent's responsible for conducting meetings on field where needed to be monitored for their safety right from within Salesforce.
- ✓ They wanted any mobile way for tracking live locations of the agents and place where the meetings are getting conducted and what are meeting statuses in real time.
- ✓ One of their Admins needed to create and assign the meeting for their Field Agents with just one reference number of Customer, which is basically to let agents use this from the other systems to get actual contact details of the person with whom the meeting is going to be conducted.
- ✓ Field Agents were also needed to be creating and assigning meetings to themselves on their own.



# Value we offered

- ✓ Their Admin can have a 360% view of current meetings going Live on the Dispatcher console. With help of the Calendar and Date based Gantt view it's easy to check the meetings conducted on previous dates and which are to be conducted in future.
- ✓ Agents provide their live updates regarding the meetings which can be seen on the Gantt view without any page refresh.
- ✓ With a custom app extension provided, Agents can create and schedule meetings for themselves right from the Field Service Lightning Mobile App.
- ✓ Map view provided the latest location updates that are refreshed with an interval of 10 seconds for the Meetings and Field Agents.

The screenshot displays the Aress Field Service Dispatcher console. The top navigation bar includes links for Home, Reports, Field Service, Contacts, Meeting Books, Meetings, Service Resources, Service Territories, and Operating Hours. The left sidebar shows a 'Scheduled' view with a 'New List View' button, a 'Policy' dropdown set to 'Customer First', and a 'Match Gantt Dates' checkbox. Below this is a table of scheduled appointments.

APPOINTMEN...	STATUS	EARLIEST START PERM...
SA-0001	Tentative	10/16/2017 7:50 AM
SA-0004	Tentative	10/18/2017 1:00 AM
SA-0008	Tentative	10/19/2017 1:00 AM
SA-0014	Tentative	10/31/2017 8:29 AM
SA-0015	Tentative	10/27/2017 1:00 AM
SA-0016	Tentative	10/27/2017 1:00 AM

The main area shows a 'GANTT' view and a 'MAP' view. The 'MAP' view displays a Google Map of Nashik, Maharashtra, India. A pop-up window for appointment SA-0016 is shown, providing details:

- Scheduled Start: 11/1/2017 10:54 AM
- Scheduled End: 11/1/2017 11:24 AM
- Earliest Start Permitted: 10/27/2017 1:00 AM
- Due Date: 12/2/2017 12:00 AM
- Account ID:
- Street: Met Bhujbal knowledge city, Adgaon

Buttons for 'View Details' and 'Dispatch' are visible at the bottom of the pop-up. The map also shows various locations and roads in the Nashik area.



Field Service Lightning

Home Reports Field Service Contacts

Policy: Customer First

Todo

Horizon: 11/01/2017

No Service Appointments Schedule Dispa

Search Service Appointment

APPOINTMEN... STATUS EARLIEST STA

Nothing to do!  
Keep up the good work

Field Agent 1 DETAILS RELATED MAP CALENDAR

Day Week Month Year Oct 30, 2017 - Nov 5, 2017 00:00 00:00 Today

	30 Monday Oct 2017	31 Tuesday Oct 2017	1 Wednesday Nov 2017	2 Thursday Nov 2017	3 Friday Nov 2017	4 Saturday Nov 2017	5 Sunday Nov 2017
08:30							
08:45							
09:00							
09:15							
09:30			9:30 AM - 10:15 AM SA-0015 • 11/01/2017 9:30 AM 11/01/2017 10:15				
09:45							
10:00		9:58 AM - 10:58 AM SA-0014 • 10/31/2017 9:58 AM 10/31/2017 10:58 AM					
10:15							
10:30							
10:45			10:54 AM - 11:24 AM SA-0016 •				
11:00							
11:15							
11:30							
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12:00		12:00 PM - 12:30 ... BA-0008 •	12:00 PM - 12:30 ... BA-0008 •				
12:15							
12:30							
12:45							
13:00							

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