



# Field Service Lightning Managed Package - Migration Guide

Spring '17



@salesforcedocs

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**Important:** This guide serves as an implementers aid, helping existing Field Service Lightning customers and implementers plan migration to the new Spring 17' Managed Package which is fully based on the new standard object model. In this guide, you will find a summary of items to review before migrating and details with regards to the new object model with examples of field mappings and migration code. This guide **does not** substitute the need for specific analysis of your Field Service Lightning implementation to ascertain which components need review and migration.

# Why Migrate? Is it Mandatory? When?

As part of our Back to Standard value, we are moving the Field Service Lightning core object model to Standard objects. This will allow a breadth of new innovations for our partners and customers which will be able to enjoy new features seamlessly including effortless integrations with other Salesforce products and clouds.

While there is no rush to upgrade an existing live implementation, plans should be prepared for migration specifically to ensure a smooth transition once required. Salesforce will continue to support existing customers and produce patches with bug fixes for urgent product issues that arise. At the same time, we recommend to take a look at the new object model which brings great new capabilities like the new field technician mobile application which is tailored for the mobile worker with a great user experience and offline capabilities, Entitlements for Work Orders and Knowledge for Work Orders, Wave for Field Service and much much more.

If you are not sure when the right time to migrate is, please open a case with our support team and we will gladly advise on next actions recommended. You will notice that the new Field Service Lightning object model is already available in your org and you may use it with the appropriate licensing restrictions. But in order to enjoy smart scheduling and optimization including appointment booking and the dispatcher console, a migration effort is required to move to the new managed package that comes with Winter 17'. The migration effort will vary from one implementation to the next and it is important to ask your implementer for an effort estimate before beginning to migrate. This guide will help estimate that effort and understand the scope of work for a successful migration.

## Migration Planning

Here are the major steps you should include in your migration plan:

- Adopt Service Appointments
  - Migrate custom Service objects to Service Appointments
  - Include standard Work Orders, Work Order Line Items, Accounts, Assets, Opportunities as needed.
    - Work Orders are now tightly linked with Service Appointments so you can specify on each work type whether a Service Appointment should be automatically created upon new Work Order Creation.
- Implement standard “Setup” objects in place of custom objects provided thru Summer MP
  - Territory Management (service territories for locations) -
    - Replacing the Locations custom object and defining the Regions and Districts for your service organization.
  - Resource Management (service resources, skills, work types, capacity, absence) -
    - The new Service Resource objects is similar to the custom Resource object you are using today but is more tightly linked to the user object to derive the personal info and this also means licensing. In order to set up Service Resources, the matching users will need to have Technician permission set licenses. A new junction object defines when a Service Resource is part of a Service Territory. This is called the ServiceTerritoryMember object and can be valid for a specific time range to support Default Home Base, Relocations and Working Locations (which territories this person can service).

- Schedule Management (operating hours/time slots for calendars/days) -
  - The Operating Hours object now keeps track of your Service Resource's availability for standard and overtime working hours. This replaces the Calendar object and has three main functions: A. Keeping the time slots of availability for each technician (If none is specified then the technician will inherit this from the Territory he is a member of. B. Defining the Appointment's time windows that are relevant for each type of work or customer type. e.g. 2 hour slots gold customers. C Visiting hours - you can link any object (typically account/Asset/Work Order) to define the allowed time to visit this customer/asset. e.g Only service the bank during branch working hours.
- Install and Setup the Winter '17 Managed Package –
- Can be installed on the same org as the previous package (different namespace) – This can help compare and move data on the same Sandbox org!
- Scheduling Policies
  - Rules, Objectives and Scheduling Policies remain custom objects that are part of the Managed Package so you will need to copy the existing records into the new custom objects in the new package
- FSL Admin App (includes standard objects for configs where applicable)
- FSL Settings
  - A new friendly User Interface to quickly manage FSL settings
  - Mobile FSL settings and standard object settings are found in the standard setup menu
- Setup the new FSL Mobile App
  - Apply mobile permission set licenses for your technicians and set up the fields and flows you need on the new mobile app

## General Guidelines for Customers and Implementers

- Move to standard objects & new managed package is not mandatory. It is an upgrade path. Customers can adopt at the pace of their choosing; specific new features may be desired.
- New managed package - Data migration to the new objects required, may necessitate changes to code/customizations. Largely a mapping exercise, potential opportunities to replace custom with standard.
- Document your work for easy duplication to new objects (lookups, process builder, triggers, formula fields, custom buttons, chatter actions). You can install the new Managed Package on a test org where the existing package is already installed and map/compare/plan ahead.
- New objects require licenses, available in developer orgs, assign thru permission sets and permission set licenses.

## New FSL Licensing with PSLs

- Licenses provisioned to orgs automatically
  - Refresh licenses in sandbox
- **Setup > Enable FSL**, Works Orders for all orgs, additional objects on enablement - This is a prerequisite as without this there is no access to the new FSL object model.
- Create Permission Sets and Assign Permission Set Licenses to FSL users
  - Dispatcher PSLs
    - Field Service Standard & Field Service Dispatcher
  - Technician
    - Field Service Standard, Field Service Scheduling, & Field Service Mobile
  - Agent
    - For Customer Service Reps using Service Cloud



Tip:

It is recommended to create a list of objects to migrate from custom to standard and use this guide as a reference.

- For each object, identify the custom fields you have added and make sure to port these as well using code or manually.
- Next review all platform tools and processes that reference the custom objects. This includes triggers, process builders, flows, approval flows, batch jobs etc....
- For each one make sure to replace the custom object and custom field with the new standard ones.
- Set up PSLs for each of your dispatchers / field technicians / Agents
- Review object layouts and make sure all layouts of the new standard objects
- Finally review any integration endpoints which hold a mapping to the custom objects and replace/rebuild with mapping to the new objects.
- Conduct sanity and regression testing on sandbox before moving to production.

## What's new with FSL Winter '17 Managed Package

- Time-Phased Service Territories - allows greater flexibility in modeling where you resources can take work, in different periods of time.
- Emergency and Candidates quick actions are now global actions - leverage these scheduling tools from every object!
- Dynamic Priority - create your own calculated priority field and the scheduling engine will respect it.
- Revamped Settings page - a clean UI with search capabilities and some new exciting feature like creating permissions sets for your user with a click of a button.
- Time-phased sharing with support for relocation - allows you to make sure Dispatchers can only access the information they need when they need it, based on the Service territories they are covering.
- The Dispatcher Console now supports Service Appointments and WO/WOLI parent information.
- Visualization of Relocation on Gantt - Previously the dispatcher could not see information of a resource that was relocated to his/her territory.
- Revamped candidates UI in the Dispatcher Console
- Pinned statuses for scheduling engine
- Scheduling Audit - new fields that record how was the service scheduled (by the scheduling engine or manually) and with which scheduling policy
- Lightning support - FSL is now certified for the Lightning experience
- Auto-schedule based on a flexible scheduling policy - for example, close due-date jobs can now be scheduled using 'High intensity' policy, while other jobs can use the 'Customer first' policy.
- Install 1 Managed Package only - previously there were 2 packages needed

## What features were deprecated ?

- Service Recurrence Chatter action – Replaced by Preventive Maintenance Plans and automation (Safe Harbor)
- Service report – Replaced by new service report configurable object
- Basic Part Management (replaced with inventory management core module)
- Breadcrumbs object - (Replaced by GPS core object and LastKnownLocation field on the Service Resource Standard object)
- Basic Timesheet management - Object model removed and part of future roadmap (Safe Harbor)
- Predictive Travel - will be replaced with seamless prediction powered by Einstein (roadmap – safe Harbor)
- Team Absence - will be replaced with new Team functionality later this year (Safe Harbor)
- The Jeopardy, Reminder and Bulk Schedule scheduled jobs (aka background jobs) were removed (Can be implemented with a Process Builder)
- Salesforce Reports & Dashboards - With the new standard object model you can create custom reports on the new standard object. In addition, a brand-new Wave dashboard and Lenses for FSL is coming soon (safe Harbor)
- Shift object model - Removed from new Package and plans are set to rebuild seamless integration with ShiftExpert (Safe Harbor)

## Object Mapping – Existing to New

Here is an object Reference to help map moving from the existing object model to the new;

Existing package object	Winter '17 impact	Winter '17 object	Object type	Comments
Breadcrumb	Deprecated	N/A	N/A	Last known location being recorded on the Service Resource record + Summer '17 GPS breadcrumbs object
Calendar	Replaced	Operating Hours	Standard	
Day	Replaced	Time Slots	Standard	
Employee Absence	Replaced	Resource absence	Standard	
Location	Replaced	Service Territory	Standard	
Location Optimization Request	Replaced	Territory Optimization Request	Custom (New MP)	
Optimization Request	Replaced	Optimization Request	Custom (New MP)	
Resource	Replaced	Service resource		
Resource Calendar	Deprecated	N/A	N/A	Service Territory Member object is looking up Operating Hours
Resource Skill	Replaced	Service Resource Skills	Standard	
Resource Team	Deprecated	N/A	N/A	
Service Order	Replaced	Work Order	Standard	
Skill	Replaced	Skill	Meta Data	
Team	deprecated	N/A	N/A	Old Team object was in the context of team absences only.
Team Absence	Deprecated	N/A	N/A	
User Location	Replaced	User Territories	Custom (New MP)	Used as a sharing tool for Dispatchers
Work Rule	Replaced	Work Rule	Custom (New MP)	



Working Location	Replaced	Service Territory Members	Standard	
Zip Code	Deprecated	N/A	N/A	
Area	Deprecated	N/A	N/A	
Capacity	Replaced	Resource Capacity	Standard	
Excluded Resource	Replaced	Resource Preference	Standard	
Predictive Travel By Area	Deprecated	N/A	N/A	
Preferred Resource	Replaced	Resource Preference	Standard	
Product Instance	Deprecated	N/A	N/A	Replaced by Location (inventory) standard object model
Relocation	Replaced	Service Territory Members	Standard	
Required Resource	Replaced	Resource Preference	Standard	
Resource Product	Deprecated	N/A	N/A	Replaced by Location (inventory) standard object model
Scheduled Job Result	Deprecated	N/A	N/A	
Scheduling Policy	Replaced	Scheduling Policy	Custom (New MP)	
Scheduling Policy Objective	Replaced	Scheduling Policy Objective	Custom (New MP)	
Scheduling Policy Work Rule	Replaced	Scheduling Policy Work Rule	Custom (New MP)	
Service	Replaced	Service Appointment	Standard	Some properties are on the SA parent e.g. Work Order
Service Level	Deprecated	N/A	N/A	Default Appointment Booking OH settings or Operating Hours on the WO entitlement
Service Objective	Replaced	Service Objective	Custom (New MP)	
Service Product	Deprecated	N/A	N/A	Inventory is Spring '17 Roadmap feature

Service Skill	Replaced	Skill Requirement	Standard	
Service Type	Replaced	Work Type	Standard	
Service Type Required Product	Deprecated	N/A	N/A	Inventory is Spring '17 Roadmap feature
Service Type Skill	Replaced	Skill Requirement	Standard	
Clock Report	Deprecated	N/A	N/A	
Timesheet	Deprecated	N/A	N/A	
Optimization Data	Replaced	Optimization Data	Custom (New MP)	
SLR Cache	Replaced	SLR Cache	Custom (New MP)	SLR is a Spring '17 Feature
User Setting	Replaced	User Setting	Custom (New MP)	
User Setting Location	Replaced	User Setting Territory	Custom (New MP)	

## Reference: From Custom to Standard Objects with Winter '17

Category	Standard Object	Description	Custom Object (Summer Managed Package)
Work Management	Work Order	A task or series of tasks representing work for your customers	N/A
Work Management	Work Order Line Item	Sub-tasks on work orders; used to track work in more detail	N/A
Work Management	Service Appointment <b>NEW</b>	Arranged visits with your customers and mobile workers	Service
Resource Management	Work Type <b>NEW</b>	Define work duration and skill requirements	Service Type
Resource Management	Skill Requirement <b>NEW</b>	1) For each Work Type, used to define the required skills (Related Record = Work Type) 2) When Work Type is set on the WO or WOLI, Skill Requirement records are created (and are used for scheduling purposes). (Related Records = WO or WOLI)	Consolidated: - Service Type Skill (defines required skills for service type) - Service Skill (required skills based on service type for service)
Resource Management	Skill	Expertise or abilities of the mobile workers. (FSL extends the existing Skill object provided by Service Cloud Live Agent).	Skills
Resource Management	Service Resource Skill <b>NEW</b>	Skills possessed by mobile workers at different proficiencies or levels	Resource Skill
Resource Management	Service Resource <b>NEW</b>	Salesforce User who can perform field service work	Resource
Resource Management	Assigned Resource <b>NEW</b>	Service Resource assigned to Service Appointments	Lookup from Service to Resource (1:1 vs. 1:M resources)
Resource Management	Service Resource Capacity <b>NEW</b>	Specifies how much the Resource can work (in hours or items)	Capacity
Resource Management	Resource Absence <b>NEW</b>	Time out or off for the Service Resource	Employee Absence
Resource Management	Resource Preference <b>NEW</b>	Designate resources as preferred, required, or excluded for scheduling on accounts and work orders. Preference types include Required, Preferred, and Excluded.	Consolidated: - Required Resource - Preferred Resource - Excluded Resource
Territory Management	Service Territory <b>NEW</b>	Region in which field service is performed	Location
Territory Management	Service Territory Member <b>NEW</b>	Resource assigned to the Service Territory. Territory types include Primary, Secondary, and Relocation. Associate dispatchers (service resource type) to service territories.	Consolidated: - Working Location - Relocation
Schedule Management	Operating Hours <b>NEW</b>	Define operating hours and assign them to: 1) Service territories and service territory members (when resources work) 2) Accounts (when accounts can be serviced) 3) Entitlements (booking windows based on entitlements)	Calendar
Schedule Management	Timeslot <b>NEW</b>	Timeslots used as part of operating hours definitions	Days

## New Standard object table

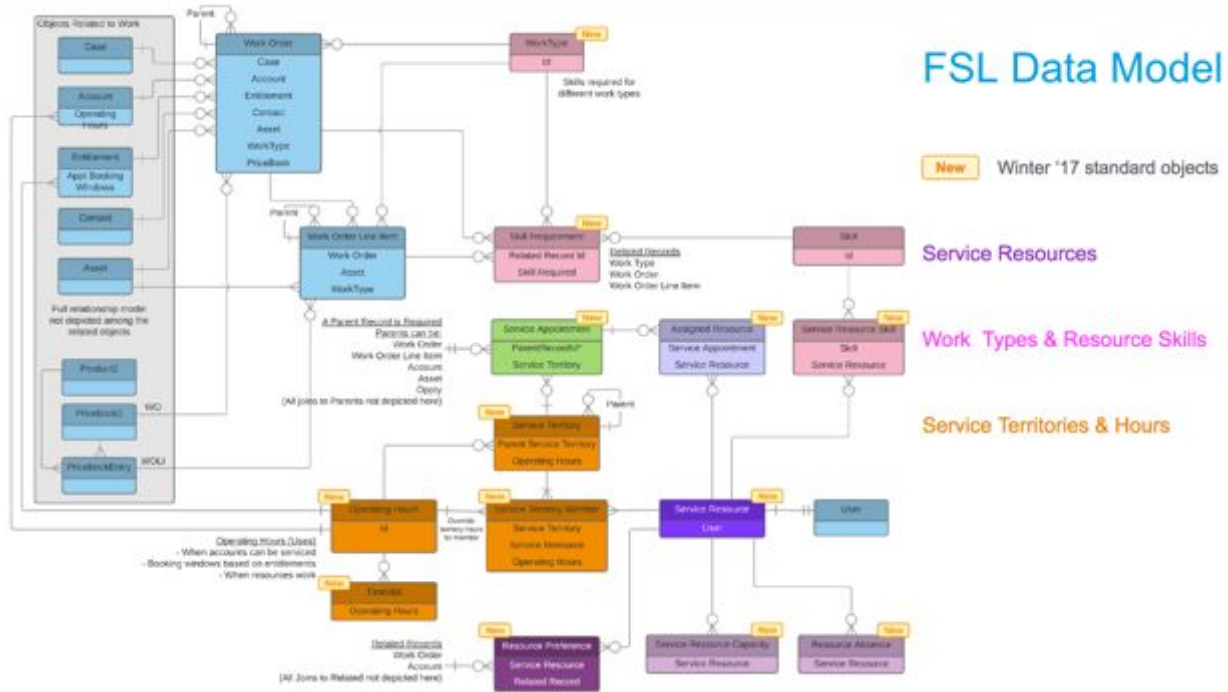
Category	Object	Description
Work Management	<a href="#">Work Order</a>	A task or series of tasks representing work for your customers
Work Management	<a href="#">Work Order Line Item</a>	Sub-tasks on work orders; used to track work in more detail
Work Management	<a href="#">Service Appointment</a> <b>NEW</b>	Arranged visits with your customers and mobile workers
Resource Management	<a href="#">Work Type</a> <b>NEW</b>	Define work duration and skill requirements
Resource Management	<a href="#">Skill Requirement</a> <b>NEW</b>	Skills required of the mobile workers to complete the work
Resource Management	<a href="#">Skill</a>	Expertise or abilities of the mobile workers
Resource Management	<a href="#">Service Resource Skill</a> <b>NEW</b>	Skills possessed by mobile workers at different proficiencies or levels
Resource Management	<a href="#">Service Resource</a> <b>NEW</b>	Salesforce User who can perform field service work
Resource Management	<a href="#">Assigned Resource</a> <b>NEW</b>	Service Resource assigned to Service Appointments
Resource Management	<a href="#">Service Resource Capacity</a> <b>NEW</b>	Specifies how much the Resource can work (in hours or items)
Resource Management	<a href="#">Resource Absence</a> <b>NEW</b>	Time out or off for the Service Resource
Resource Management	<a href="#">Resource Preference</a> <b>NEW</b>	Designate resources as preferred, required, or excluded on accounts or work orders.
Territory Management	<a href="#">Service Territory</a> <b>NEW</b>	Region in which field service is performed
Territory Management	<a href="#">Service Territory Member</a> <b>NEW</b>	Resource assigned to the Service Territory
Schedule Management	<input type="checkbox"/> <a href="#">Operating Hours</a> <b>NEW</b>	Define operating hours and assign them to service territories, service territory members, or accounts
Schedule Management	<a href="#">Timeslot</a> <b>NEW</b>	Timeslots used as part of operating hours definitions

[H&T Enable Field Service Lightning](#) (Work Orders enabled for all orgs; Enable FSL for addl. objects, licenses apply)

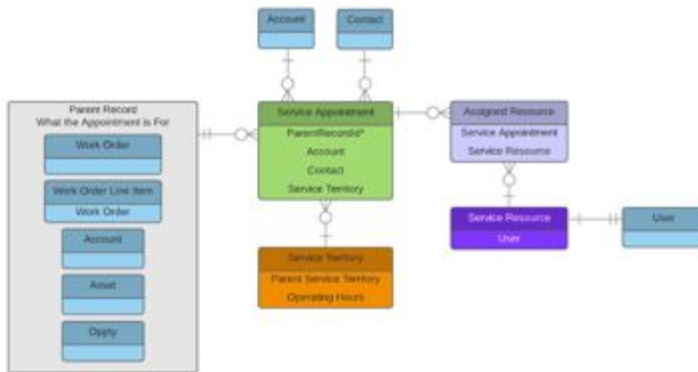
[H&T Assign Field Service Lightning Permission Sets](#) (Assign Permission Sets for object CRUD)

## Data Model Diagrams

# FSL Data Model

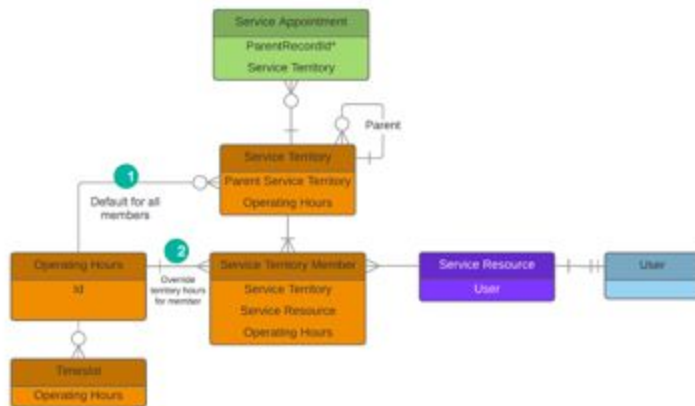


# Service Appointment Data Model



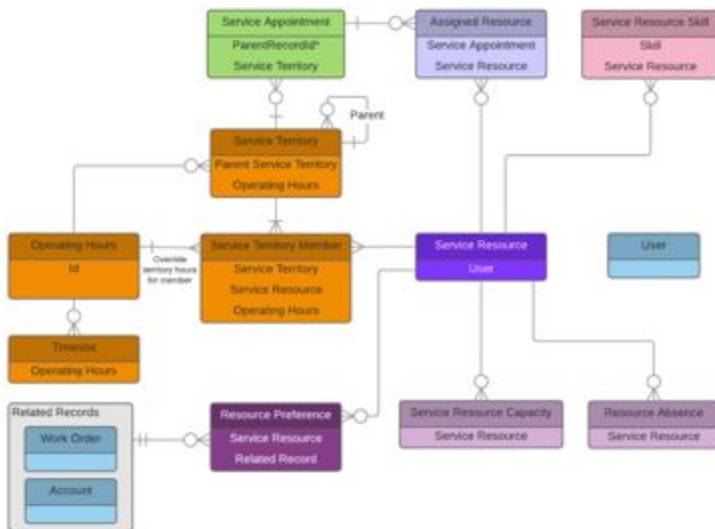
- Logically separates work & visits (what/where vs. who/when)
- Define what the appointment is for, thru a Parent Record
- Additional reference information
  - Account
  - Contact
  - Service Territory (resources)
- Assigned Resources perform work on appointment
  - Scheduling / optimization targets "best" resource
  - Single Resource targeted by scheduling
- Dispatch Console uses Service Appts

## Service Territory Data Model



- Regions where you work
  - Organize into hierarchies
  - Assigned Service Resources are Service Territory Members
  - Territory Membership Types include Primary, Secondary, & Relocations
  - Scheduling evaluates resources who are Service Territory Members as candidates
  - Operating Hours define when you provide service in the territory
- Service Resources inherit territory hours by default
  - Override if necessary for members

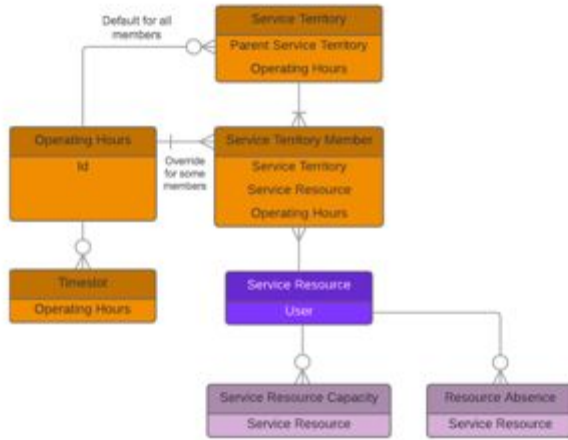
## Service Resource Data Model



- Define Service Resources thru a type as techs & dispatchers
- Associate to Salesforce user (assign permission sets)
- Where
- Assign resources to territories
- When
- Manage availability thru Service Territory or by Member
- Define Resource Absences
- For What & Whom
- Work requires skills; Resources possess skills
- Resource Preferences for certain work orders or accounts
- How Much
- Capacity-based resources, typically for contractors



## Service Resource Data Model: Where, When, How Much



### Where

Specify where resources work by assigning them to territories

Creates a Service Territory Member junction record - key input for scheduling/optimization

### When

Manage availability thru Service Territory or by Member

- Service Territory Members inherit the Territory's Operating Hours, i.e. they work when the territory is open.
- Override for specific territory members by assigning Operating Hours

Resource Absence for time off

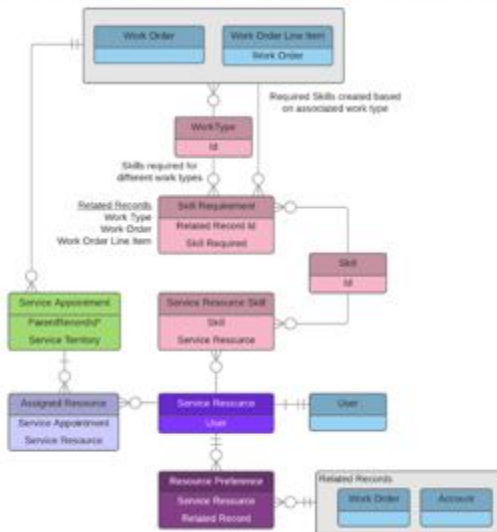
- Configurable type and date range

### Resource Capacity

Typically used with contractors

Indicates how much work (hours or units) a resource can perform in a time period (day, week, month) over a date range

## Service Resource Data Model: For What Work



Skills are areas of expertise, certifications, or qualifications

Resources possess skills at different proficiencies or levels

- Define which resources have them & at what numerical skill level

Work requires skills

Work Types are templates that drive estimated work duration, skill requirements, parts requirements (Spring '17 safeharbor), & service report template (Spring '17 safeharbor) for the associated work

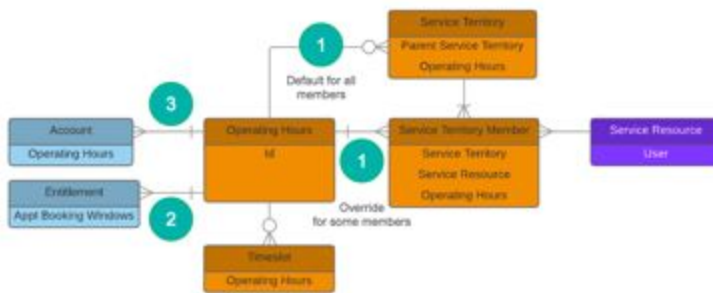
- Set Work Type on WO & WOLI to drive Skill Requirements
- Skill Requirements are created when the WOWOLI record is created

Resources are assigned to Service Appointments based on skill requirements & other scheduling elements

- Resource Preferences
- Manage Required, Preferred, and Excluded Resources for Accounts and Work Orders



## Operating Hours Data Model



Operating Hours have several uses

1. When Service Resources work
2. Booking windows based on entitlements (i.e. 2 hr vs 4 hr windows)
3. When Accounts can be serviced, typically used to constrain visiting hours (do not visit during peak hours)

Operating Hours have Time Slots

4. Define slots per day of week and date range
5. Time Slots have a type for normal vs. extended time (i.e. overtime)

## Appendix A – Field level mapping

### Service → Service Appointment

Service Fields	WO Fields	WOLI	Service Appointment Fields	Data Type (Custom)
Created By			CreatedBy	Lookup(User)
Last Modified By			LastModifiedBy	Lookup(User)
Owner			Owner	Lookup(User,Queue)
Service Name			Appointment Number	Auto Number
			Parent Record	
			ParentRecordType	
			Actual Duration	
			Actual Start Time	
			Actual End Time	
			Address	
Account	Account	Account	Account	Lookup(Account)
Appointment Finish			Arrival Window End	Date/Time
Appointment Grade			Appointment_Grade__c (MP)	Number(3, 2)
Appointment Start			Arrival Window Start	Date/Time
Area				Lookup(Area)
Auto Geocode				Checkbox
Auto Schedule			Auto_Schedule__c (MP)	Checkbox
City			Address	Text(100)
Comment				Long Text Area(32768)
Contact	Contact		Contact	Lookup(Contact)
Country			Address	Text(100)



Date				Formula (Date)
Day Of Week				Formula (Text)
Description	Description		Description	Long Text Area(32768)
Due Date			Due Date	Date/Time
Duration			Duration	Number(10, 2)
Duration Type			DurationType	Picklist
Early Start			Earliest Start Permitted	Date/Time
Emergency			Emergency__c (MP)	
Finish			Scheduled End Time	Date/Time
Gantt Color			GanttColor__c (MP Field)	Text (7)
Gantt Label			GanttLabel__c (MP Field)	Text(255)
Geolocation				Geolocation
Incomplete Reason				Picklist
Incomplete Reason Text				Long Text Area(32768)
In Jeopardy			InJeopardy__c (MP)	Checkbox
In Jeopardy Reason			InJeopardyReason__c (MP)	Picklist
Internal SLR Geolocation			InternalSLRGeolocation__c (MP)	Geolocation
Is MultiDay			IsMultyDay__c(MP)	Checkbox
Location	Service Territory		Service Territory	Lookup(Location)
My Service				Formula (Checkbox)
Notification Time				Date/Time
Notification Type				Picklist
Open Date				Date/Time
Phone				Phone
Pinned			Pinned__c (MP)	Checkbox
Priority				Number(18, 0)

Recurrence				Formula (Checkbox)
RecurrenceKey				Text(255)
Related Service			Related_Services__c (MP)	Lookup(Service)
Resource			Replaced By Assigned Resource object	Related List
Routing Source				
Same Day			Same_Day__c (MP)	Checkbox
Same Resource			Same_Resource__c (MP)	Checkbox
Service Level				
Service Order				Lookup(Service Order)
Start			Scheduled Start Time	Date/Time
State			Address	Text(255)
Status			Status	Picklist
			Status Category	
Street			Address	Text(255)
Time Dependency			Time_Dependency__c(MP)	Picklist
Tooltip Text				Text(255)
Total Travel (in hours)				Formula (Number)
Travel Time From				Number(18, 0)
Travel Time From (Hours)				Formula (Number)
Travel Time To			AssignedResource.Estimated TravelTime	Number(18, 0)
Travel Time To (Hours)			AssignedResource.Estimated TravelTimeFrom__c (MP)	Formula (Number)
Type				Lookup(Service Type)
UpdatedByOptimization			UpdatedByOptimization__c (MP)	Checkbox
Virtual Service For AB			Virtual_Service_For_Chatter_Action__c (MP)	Checkbox
Visiting Hours Calendar	VisitingHours__c (MP)	Visiting Hours__	VisitingHours__c (MP)	Lookup(Calendar)

		c (MP)		
Zip			Address	Text(15)
			Subject	
	Parent WO			
	Start Date			
	End Date			
	Address			
	Asset			
	Case			
	Created By			
	Create Date			
	Discount			
	Grand Total			
	Last Modified By			
	Last Modified Date/Time			
	Owner			
	Line Items			
	Price Book			
	Priority			
	Status			
	Subject			
	Sub-Total			
	Tax			
	Total Price			
	WO Number			
	Prevent_Geocoding_For_Chatter_Actions__c (MP)		Prevent_Geocoding_For_Chatter_Actions__c (MP)	Checkbox

			Schedule_Mode__c (MP)	Picklist
			Scheduling_Policy_Used__c	Lookup (Scheduling Policy)
	Scheduling Priority			Formula (Number)

## Resource → Service Resource

Resource Fields	ServiceResource Fields	Data Type (Custom)
Created By	Created By	Lookup(User)
Last Modified By	Last Modified By	Lookup(User)
Owner	Owner	Lookup(User,Queue)
Resource Name	Name	Text(80)
	ResourceType	
	Description	
Active	Active	Checkbox
Area		Lookup(Area)
Auto Geocode		Checkbox
City	ServiceTerritoryMember.City	Formula (Text)
Contract		Lookup(Resource Contract)
Contractor	IsCapacityBased	Checkbox
Country	ServiceTerritoryMember.Country	Formula (Text)
Email		Formula (Text)
Gantt Label	GanttLabel__c (MP)	Text(255)
Homebase	ResourceTerritoryMember.Address	Geolocation
Internal SLR Homebase		Geolocation
Location	ServiceTerritoryMemer.TerritoryType	Lookup(Location)
Manager		Formula (Text)
Phone		Formula (Text)
Picture Link	(User's chatter picture)	Long Text Area(8000)
Priority	Priority__c	Number (4,0)

State	ServiceTerritoryMember.State	Formula (Text)
Street	ServiceTerritoryMember.Street	Formula (Text)
Tooltip Text		Text(255)
Travel Speed	Travel_Speed__c (MP)	Number(4, 0)
User	User	Lookup(User)
Zip/Postal Code	ServiceTerritoryMember.PostalCode	Formula (Text)
	IsOptimizationCapable	Boolean

## Service Type → Work Type

Service Type Fields	Work Type Fields	Data Type (Custom)
Created By	Created By	Lookup(User)
Last Modified By	Last Modified By	Lookup(User)
Owner		Lookup(User,Queue)
Service Type Name	Work Type Name	Text(80)
Due Date Offset	Due_Date_Offset__c (MP)	Number(9 0)
Duration	Estimated Duration	Number(5, 2)
Duration Type	Duration Type	Picklist
	<b>Auto-Create Service Appointment</b>	Boolean (If checked will create an SA automatically upon creation of the Parent (WO/WOLI))
	Description	
	Exact_Appointments__c	

## Lookup to Resource from Service Object → Assigned Resource object

Custom Fields	Assigned Resource Fields	Data Type (Custom)
---------------	--------------------------	--------------------

	Assigned Resource Number	String
	Service Appointment	MasterDetail (ServiceAppointment)
	Service Resource	Lookup (ServiceResource)
	Actual Travel Time	Number
	Estimated Travel Time	Number
	EstimatedTravelTimeFrom__c (MP)	Number (16,2) in Mimutes
	UpdatedByOptimization__c (MP)	Checkbox

## Skill → New Metadata Skill (Not a standard object)

<b>(Custom) Skills Fields</b>	<b>Skills Fields</b>	<b>Data Type (Custom)</b>
Skill Name	Name	Text
Category		Picklist
Owner		Lookup(User)
Created By		Lookup(User)
Last Modified By		Lookup(User)
	Developer name	
	Description	

## Resource\_Skill → ServiceResourceSkill

<b>Resource Skill Fields</b>	<b>ServiceResourceSkill Fields</b>	<b>Data Type (Custom)</b>	<b>ServiceResourceSkill type</b>
Created By	Created By	Lookup(User)	Lookup(User)
Last Modified By	Last Modified By	Lookup(User)	Lookup(User)
Resource	Service Resource	MD(Resource)	MD(ServiceResource)
Resource Skill Number	Resource Skill Number	Autonumber	Autonumber
Skill	Skill	MD(Skill)	Lookup(Skill)
Skill Level	Skill Level	Number (3,0)	Double(4,2)
	Start Date		Date
	End Date		Date

## Resource Preference consolidation

<b>Field</b>	<b>Type</b>	<b>FS Field Label</b>
Service Resource	Lookup<Service Resource>	Service Resource

RelatedRecord	Lookup<Account,WorkOrder>	Related Record
Preference Type	Enum - Required, Preferred, Excluded	Preference Type
Resource Preference Number	Auto-number	Name

## Service Skill -> SkillRequirement

Service Skill	Data type	SkillRequirement	SkillRequirement Type
Service	Master-Detail(Service)	RequiredFor	Master-detail(Wo/WOLI/WorkType)
Skill	Master-Detail(Skill)	Skill Required	Lookup ( Skill )
Skill Level	Number(0,3)	Skill Level	Double(4,2)
Name	Auto Number	Skill Requirement Number	Auto Number
CreatedBy	LookUp(User)	CreatedBy	LookUp(User)
LastModifiedBy	LookUp(User)	LastModifiedBy	LookUp(User)

## Locations -> Service Territories

Location Fields	ServiceTerritory Fields	Data Type (Custom)	ServiceTerritory type
Created By	Created By	Lookup(User)	Lookup(User)
Last Modified By	Last Modified By	Lookup(User)	Lookup(User)
Location Name	Name	Text(80)	
Owner		Lookup(User)	
Parent Location	Parent Territory	Lookup(Location)	Lookup(ServiceTerritory)
Start of Day		Text(5) - picklist	
System Jobs		Picklist (multi-select)	
Time Zone	OperatingHours.TimeZone	Picklist	
First Day of Working Week		Picklist	
	Active		Boolean
	Description		Text
	Address		Address
	OperatingHours		Lookup(OperatingHours)
	Internal_SLR_Geolocation__c (MP)		Geolocation
	System_Jobs__c (MP)		Picklist (Multi-Select)

New ServiceTerritoryMember junction object replaces lookup from Resource to Location

<b>ServiceTerritoryMember Fields</b>	<b>Data Type (Custom)</b>	<b>ServiceTerritoryMember type</b>
Created By	Lookup(User)	
Last Modified By	Lookup(User)	
Service Territory	MD(Location)	Lookup(ServiceTerritory)
	Formula (Text)	
Service Resource	Lookup(User)	Lookup(ServiceResource)
Member Number	Autonumber	Autonumber
Territory Type		Enum (Primary, Secondary, Relocation)
Address		Address
Start Date		Date
End Date		Date
OperatingHours		Lookup(OperatingHours)
Internal_SLR_HomeAddress_Geolocation__c (MP)		Geolocation

## Capacity → Resource Capacity

<b>Capacity (Object) Fields</b>	<b>Resource Capacity Fields</b>	<b>Resource Capacity Field Labels</b>	<b>Service Resource Fields</b>	<b>Data Type (Custom)</b>
<b>Capacity Name</b>	Capacity Name	Resource Capacity Number		Auto Number
Resource	ServiceResource(MD)	Service Resource		MD(ServiceResource)
Period Start	Effective Start	Start Date		Date/Time
	Effective End	End Date		Date/Time
Duration Type	Capacity Duration Type	Time Period		Enum(Day,Week,Month)
Capacity in Hours	Capacity in Hours	Hours per Time Period		Double
Capacity in Number of Services	Capacity in Work Orders	Work Items per Time Period		Number
Gantt label				Text (80)
Owner	Owner			Lookup(User,Queue)
Hours In Use	HoursInUse__c (MP)			Formula (Number)
Minutes Used	MinutesUsed__c (MP)			Number (14,0)
Services Allocated	Work_Items_Allocated__c (MP)			Number (8,0)



## Calendar → Operating Hours

Calendar Fields	Data Type (Click)	Operating Hours Fields	Data type (SF)
Name	Text(80)	Name	Text
		Tlmezone	Enum(int)
Description	Text(255)	Description	Text
Exact Appointments	Checkbox		
Owner	User,Queue		

## Day → Time Slots

Day Fields	Data Type (Click)	Time Slot Fields	Data type(SF)
Day Number	Autonumber	??	
Calendar	Lookup(Calendar)	Operating Hours	Lookup(OperatingHour)
Start Tlme	Text	StartTime	TlmeOnly
Finish Tlme	Text	EndTime	TlmeOnly
Record Type	Record Type	DayOfWeek	Enum(Monday-Sunday)
Type	Picklist	Type	Enum(Regular/Extended)

## Employee Absence → Resource Absence

Employee Absence Fields	Data Type	Resource Absence Fields	Data Type
Created By	Lookup(User)	Created By	Lookup(User)
Last Modified By	Lookup(User)	Last Modified By	Lookup(User)
Owner	Lookup(User, Queue)		
Employee Absence Number	Autonumber	Absence Number	Autonumber
Record Type	RecordType	RecordType (MP)	
Area	Lookup(Area)		
Comment	Long Text Area	Description	
Date	Formula(date)		
Day of Week	Formula(Text)		
Finish	Date/Time	End Time	DateTime
Gantt Label	Text(255)	Gantt Label__c (MP)	
GeoLocation	Geolocation		

Internal SLR Geolocation	Geolocation	InternalSLRGeolocation__c (MP)	
Location	Formula(Text)		
My Absence	Formula(Checkbox)		
RecurrenceKey	Text(255)		
Resource	Lookup(Resource)	Resource	Lookup(Resource)
Shift	Lookup(Shift)	Roadmap	
Start	Date/Time	Start Time	DateTime
Team Absence	Lookup(Team Absence)		
Travel Time From	Number(18,0)	EstTravelTimeFrom__c (MP)	Number (9,0)
Travel Time To	Number(18,0)	EstTravelTime__c (MP)	Number (9,0)
Type	Picklist	Type	Picklist
UpdatedByOptimization	Checkbox		
		Address	

## Resource Calendar → Service Territory Member

Resource Calendar Fields	Data Type (Click)	Resource Operating Hours Fields	Data type (SF)
ResourceCalendar Number		??	
Calendar	Lookup(Calendar)	Operating Hours	Lookup(Operating Hours)
Resource	Lookup(Resource)	Service Resource	Lookup(Service Resources)
Effective As Of	Date	Effective Start	Date
Effective Until	Date	Effective End	Date

## Appendix B – Data Migration Code examples

### Moving Service Types to Work Types

```
List<WorkType> new WorkOrderTypes = new List<WorkType>();
    for(CKSW_BASE__Service_Type__c baseServiceType:lst_serviceType){
        WorkType woType=new WorkType();
        woType.Name=baseServiceType.Name;
        woType.BaseId__c=baseServiceType.Id;
        woType.EstimatedDuration=baseServiceType.CKSW_BASE__Duration__c;

migrationUtils.customFieldsFill(woType,baseServiceType,fieldMap,basefieldMap,customFields
);
```

```

        newWorkOrderTypes.add(woType);
    }
}

```



Tip:

It is recommended to build a **migration utils** function can look for additional custom fields that were added and re-created them on the new Work Type object and populate them with corresponding values.

```

public static void customFieldsFill(sObject sObj,sObject sObjBase,
Map<String,Schema.SObjectField> fieldMap,Map<String, Schema.SObjectField>
basefieldMap,String customFieldLst){
    List<String> fieldApiNames=new List<String>();
    system.debug('customFieldLst for migration'+customFieldLst);
    if(customFieldLst.contains(',')){
        fieldApiNames=customFieldLst.split(',\\s+');
    }
    else
        fieldApiNames.add(customFieldLst);
    system.debug('fieldApiNames '+fieldApiNames);
    for(String fieldApiName:fieldApiNames){
        Schema.SObjectField field = fieldMap.get(fieldApiName);
        Schema.SObjectField basefield = basefieldMap.get(fieldApiName);
        if(field==null){
            system.debug('in if 1 '+fieldApiName+' '+field+' '+basefield );
            continue;
        }
        else{
            if(field.getDescribe().getName()==basefield.getDescribe().getName()&&field.getDescribe().get
            Type()==basefield.getDescribe().getType()){
                if(sObjBase.get(fieldApiName)!=null){
                    sObj.put(fieldApiName,sObjBase.get(fieldApiName));
                    System.debug('*** fieldType = ' + fieldApiName+' '+sObj+'
'+sObjBase.get(fieldApiName));
                }
            }
        }
    }
}

```

```
//.getDescribe().getType().name()
// System.debug('*** fieldType = ' + field);
/*String customfieldname= (String)sObj.get('Name');
sObj.put('Name','install1');

system.debug('**custom field utils '+sObj+' '+ (String)sObj.get('Name'));*/

}
```