

## Work Type Management

① This feature has been discontinued. You can now use its updated and improved version: **<u>Record</u> <u>Templates</u>** 

A **Work Type** is a template for the services in a work order. Use these templates to add the service details to the work orders quickly and to avoid repetitive data entry. A work type will be used while creating a <u>service</u> to link the skills and parts to a service. When a service (with which a work type is linked) is added to a <u>work order</u>, the skills and parts associated with the service automatically get added to the work order.

(i) **Permission Required**: <u>Work Types</u> Check the Edition-based availability of <u>Work Type</u>.

## **Create Work Type**

To create a work type:

- 1. Navigate to **Setup** > **Field Service Settings** > **Work Type** and click **Create Work Type**.
- 2. Enter the following details, then click **Save**:
  - a. A name in the Work Type Name field.
  - b. An Estimated Duration of the work type.
  - c. An **Estimated Time Unit** for measuring the duration. The unit can be in hours or minutes.
  - d. A **Description** of the work type.
- 3. Click + **New Line** to add **Parts** and **Quantity** required for the work type and click **Save**. Use  $\bigcirc$  to delete the part entries.
- 4. Click + **New Line** to add **Skills** required for the work type and click **Save**. Use  $\bigcirc$  to delete the skill entries.

Create Work Type		×
Work Type		
Work Type Name Carpet Cleaning		
Estimated Duration 3		
Estimated Time Unit Hours	•	
Description		
Parts		
Part	Quantity	
Scrubbing Brush with Handle $\times$	1	$\ominus$
Carpet & Rug Shampoo and Cle:	1	$\ominus$
Oxi Action Carpet Stain Remove	2	Θ
+ New Line		
Skills		
Skill		
Carpet cleaning and stain remov	(	Э
	Cancel	Save

## **Editing Work Types**

To edit work types:

- 1. Navigate to **Setup** > **Field Service Settings** > **Work Type**.
- 2. Hover over the name of the work type and click the **Edit** [ **/** ] icon. Modify the required details and click **Save**.
  - Click **Delete** to remove the work type.
  - Click Add Part to add additional Parts.
  - Click Add Skill to add additional Skills.

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Setup	Work Types								G	ව Help
General	Work types are work order templ	ates that help you save	time and facilitate stan	dardization	of your field serv	rice tasks.				
Workforce	Q Search							Crea	ate Work	Туре
<ul> <li>Field Service Settings</li> </ul>	Work Type Name	Description	Create	d By		Created On				
Work Type	Connet Classifier								1	
Other Settings	Carpet Cleaning	Carpet Cleaning Lilly Rush Jun 29, 2023 12:02 AM (GMT -07:00)				02 AM (GMT -07:00)			-×	
Customization								De	lete	- 11
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Data Administration										
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Click on the work type to view its details. In the *Work Type* overlay, you can find the **Edit** and **Delete** options.

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Setup • General	Work Types Work types are work order templates that help you save time and facility	Carpet Cleaning	Edit V Delete
<ul> <li>Workforce</li> <li>Field Service Settings</li> </ul>	Q Search	Overview	
Work Type Other Settings Customization Email Automation Billing	Carpet Cleaning	Work Type       Work Type Name     Carpet Cleaning       Estimated Duration     3       Estimated Time Unit     Hours       Description        Parts	
<ul> <li>Data Administration</li> <li>Developer Space</li> </ul>		Part       Image: Carpet Scrubbing Brush with Handle       Image: Carpet Scrubbing Brush with Handle         Carpet & Rug Shampoo and Cleaner       Image: Carpet Scrubbing Carpet Schain Remover Powder         Oxi Action Carpet Stain Remover Powder       Image: Carpet Schain Remover Powder         Skill       Image: Carpet Cleaning & Stain Removal	Quantity 1 2
Chats Contacts	Here is your Smart Chat (Ctrl+Space)		