

Oracle Fusion Cloud Applications

Implementing Fusion Field Service Work Orders

FA Latest



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Get Help

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Thanks for helping us improve our user assistance!

1 Audience and Scope

Audience and Scope

This guide outlines the implementation steps required to create, and update work orders in Oracle Fusion Service.

To set up and work with more features of Oracle Fusion Service, see the Oracle CX documentation on [Oracle Help Center](#).

Each implementation of Oracle Fusion Service is unique, and leads to the implementation of application modifications that support unique business requirements. While the steps in this document describe how to implement Fusion Field Service work orders, they can be combined with modifications that have already been applied to each instance.

Related Guides

To understand more about the information covered in this guide, see the following table for a list of related guides.

Title	Description
<i>Integrating Fusion Service with Field Service</i>	Contains information for integrating Oracle Fusion Service with Oracle Field Service.
<i>Using Service Center in the Redwood User Experience</i>	Contains information to help service managers, service personnel, and other service end users to perform day-to-day business tasks using Oracle Fusion Service in the Redwood User Experience.
<i>Implementing Service Center with the Redwood User Experience</i>	Describes how to set up Service Request Management for Oracle Fusion Service.
<i>Oracle Fusion Cloud Sales Automation Implementing Sales</i>	Describes your initial Oracle Fusion Sales implementation procedures, based on a simple sales-force-automation use case.
<i>Oracle Fusion Cloud Sales Automation Implementing Customer Data Management for Sales and Fusion Service</i>	Contains information to help implementors define the setup for managing customer information and the configuration for customer hub deployment.
<i>Oracle Fusion Cloud Sales Automation Implementing Enterprise Contracts</i>	Contains conceptual information and procedures needed to implement the contract management features of Oracle Fusion Sales.
<i>Oracle Fusion Cloud Sales Automation Implementing Incentive Compensation</i>	Contains information on implementing sales compensation and payment plans.
<i>Oracle Fusion Cloud Sales Automation Implementing Sales</i>	Contains conceptual information and procedures needed to implement components and features of Oracle Fusion Sales.

Title	Description
<i>Oracle Fusion Cloud Customer Experience Understanding Import and Export Management for Sales and Fusion Service</i>	Contains information to help those charged with exporting and importing object data.
<i>Oracle Fusion Cloud Customer Experience Securing Sales and Fusion Service</i>	Contains information to help setup users and sales administrators configure access to functionality and data.
<i>Oracle Fusion Cloud Customer Experience Security Reference for Sales and Fusion Service</i>	Lists the predefined security data included in the Oracle Fusion Sales offerings.
<i>Oracle Fusion Cloud SCM Getting Started with Service Logistics Implementation</i>	Describes the setup tasks that need to be completed to successfully implement Oracle Fusion Service Logistics.
<i>Oracle Fusion Cloud SCM Using Service Logistics</i>	Describes how to use Oracle Service Logistics to order and receive parts, manage trunk stock and assign stocking locations to technicians.

2 Overview

Fusion Field Service Work Orders Overview

Starting in 26A, because Field Service is now in Fusion, there's a new work order type called **Fusion Field Service Work Order**. Oracle still supports Generic and Oracle Field Service work orders (which use the Oracle Integration Cloud accelerator), but the new Fusion Field Service work order doesn't need an accelerator.

Data is no longer duplicated, synced, or mapped into Field Service. Fusion Field Service uses a single, unified setup. Field Service setup and Work Order setup both reference the same data.

The work order defines what needs to be done, and that scope can be split into one or many activities in Fusion Field Service. Think of the work order as the header, and the activities as the child records.

Work order data is also what the technician sees in Fusion Field Service. When you update fields on the work order, those changes show up immediately on the related activities. So if three activities share the same work order, they'll all show the same common data. For example, changing the contact on the work order updates it on all three activities automatically.

If you're deciding where to add a custom field, ask: should this value be the same for every activity under the same work order? If yes, add it to the work order so it rolls down to all activities. If it needs to be different for each activity, add it to the activity instead.

3 Implementation Steps

Introduction

This chapter focuses on setting up Oracle Fusion Field Service Work Orders. To set up Generic work orders, see the next chapter in this guide. To Integrate Oracle Fusion Service with Oracle Field service see *Integrating Fusion Service with Field Service* and *Integrating Fusion Service with Field Service Questions and Answers*.

Setting the Permission Group on Job Roles

You need to set permission groups for your user's CRM job roles so that when your users create a Fusion Field Service work order, they can view the activity associated with the work order in Field Service.

Steps to Enable Permission Groups

1. **Enable Profile Option:** Navigate to the **Manage Administrator Profile Values** task in Setup and Maintenance.
2. Set the profile **ORA_AIC_SAS_INTEGRATION_ENABLED** to **Yes**.
3. Navigate to the Security Console: Tools > Security Console > Roles
4. **Edit Role:** Search for the job role (like customer service representative, customer service manager, or any custom roles you've created) follow the next steps for each of the job roles you're using:
5. Click **Edit Role**.
6. **Enable Group:** On the Basic Information page, click **Enable Permission Groups** .
7. **Assign Duty Role:** Go to the Role Hierarchy page, and add the necessary duty role that contains the permission groups.
8. Go to the **Summary** tab and click **Save and Close**.

Configuring the Work Order Type

To configure Oracle Fusion Field Service work orders do the following:

1. Navigate to Setup and Maintenance > Setup Service > Work Order.
2. Select the **Manage Types of Work Orders** task.
3. There are three types of predefined work orders:
 - a. Generic
 - b. Oracle Field Service
 - c. **Oracle Fusion Field Service (new in 26A)**
4. Enable the **Oracle Fusion Service Work Order**.
5. Select the **Edit** (pencil) icon.
6. In the Configure Type of Work Order page, make any desired edits to the display order or description.

7. Select **Continue** to begin configuring statuses.

Configuring Statuses

The Configure Statuses page shows the predefined work order statuses, which reflect the overall progress of the work. When a work order is created and submitted, an activity is automatically created in Field Service. Then, whenever that activity is updated, it kicks off a process that updates the work order status based on the rules shown in the following table:

Work Order Status	Rules
In Progress	<ul style="list-style-type: none"> • If at least one activity is started • Or no other rules apply
Canceled	<ul style="list-style-type: none"> • All activities are canceled
Not Done	<ul style="list-style-type: none"> • All activities aren't done
Scheduled	<ul style="list-style-type: none"> • All activities are pending • And at least one activity has been scheduled (date or time slot fields are populated)
Unscheduled	<ul style="list-style-type: none"> • All activities are pending • And no activity has been scheduled (date and time slot aren't populated)
En Route	<ul style="list-style-type: none"> • At least one activity is en route • And all activities are en route or pending
Complete	<ul style="list-style-type: none"> • At least one activity is complete • And all other are complete, canceled or not done
Suspended	<ul style="list-style-type: none"> • At least one activity is suspended • And all activities are suspended or pending

For example, let's say a technician starts work on a work order that has three activities. As soon as the work starts, the work order status moves to In Progress. Even if the first activity is completed, the work order stays In Progress until all three activities are done. Once everything is completed, the work order moves to Closed.

If an activity can't be done or needs to be paused, the technician can suspend it in Field Service. When that happens, the activity is cloned and stays in a suspended state until work starts again. Field Service tracks when activities are suspended and restarted. And to reach a Complete status, all activities under the work order need to be closed.

To create statuses:

1. Select **Create Status**.
2. Create the status associated with one of the status categories.

The status field on the work order is editable. If you add a status, the user can only select one of the statuses for the status category in which the status belongs.

3. When you're done configuring statuses, select **Continue** to configure activity types.

Configuring Activity Types for Work Orders

You must first, setup activity types in Fusion Field Service. If there are no activity types created in Fusion Field Service, the **Configure Activity Types** page will be blank.

Once you've set up activity types in Fusion Field Service, use the **Configure Activity Types** page to enable the activity types that you want exposed to agents on the work order.

For the activities that you do enable, you can select the edit icon to edit the estimated duration.

When to edit the duration:

- Multi segment: If this activity has a duration in Field Service of being longer than a day, you must set the duration on this page too.
- Non multi segment: Set the duration here and it passes over when the activity is created in Field Service when it creates the activity. You can also leave it blank.

When you've completed configuring activity types for work orders, select **Continue** to create connections.

Creating Connections

In 26A, you need to create a connection to Fusion Field Service through a REST service call. Otherwise, if you're using a third-party connection, it will appear here. Starting in 26B this connection will be predefined.

To create the connection, use the following:

- REST Service:
`{{Fusion Service URL}}crmRestApi/resources/latest/fieldServiceConnections`
- Body:

```
{
  "ConnectionTypeCd" : "ORA_SVC_WO_FFS",
  "ConnectionName" : "FFS Connection"
}
```
- Authorization: Use the service app SERVICE_APP_ICS_ID or the User ID you created.

When you're done configuring connections, select **Continue** to configure the work order area.

Configuring the Work Order Area

Work Order Retrieval Tab

1. If you're using work order retrieval, on the **Work Order Retrieval** tab, select the **Enable** option to enable work order retrieval in field service work order create page.

2. Enter a number for the maximum number of records that will be displayed to the user on the work order create page.
3. Contact your Oracle Field Service administrator to coordinate the numbers you enter for the Work Skill and Work Zone Fitness Formula settings.

More information about fitness formulas can be found in the *Administering Oracle Field Service* guide.

Work Zone Definition

Note: Required if you're using Direct Assignment Scheduling.

1. Click **Retrieve Work Zone Key**. This calls the metadata service to retrieve work zone keys from Oracle Field Service.
2. Select the Work Order Fields that map to the Field Service Work Zone Key.

Configuring Schedulers

If you're using Scheduler Configuration, click the **Enable Resource Scheduling** checkbox.

Quota-based Booking

The scheduler contains the information users see on the calendar availability for scheduling service. The following two tables show the scheduler legend.

Scheduler Cutoff	Availability	Color Shown on Calendar
High Cutoff	All times above this cutoff threshold show on the scheduling calendar as available time slots.	White
Low Cutoff	Times equal to or less than this cutoff show on the scheduling calendar as unavailable time slots.	Red

Scheduler Cutoff	Color Shown on Calendar
Any times above the low cutoff up to the high cutoff.	Yellow
No quota was defined in Oracle Field Service	Gray
Resolution due for staying in compliance with the SLA	Blue

The Current Day Buffer can be set so that an agent can't book within a set time frame. For example, if a time slot is available at 3pm and you don't want an agent to book service for a two-hour time slot before 3pm, then set the buffer to 120 minutes. This blocks the agent from scheduling time from 1pm to 3pm.

Set the Scheduler Start of Week to the day your business week begins. This sets the schedule calendar to begin with the day your business week begins. For example, if your business week begins on Sunday, the calendar starts with Sunday and goes through the following Saturday.

Direct Assignment Booking

You can have as many direct assignment schedulers as you want. Use the icons to Add, Edit, or Duplicate schedules in the table.

To create a Scheduler:

1. Click the **Add** icon.
2. Enter unique values for the following:
 - o Scheduler Code
 - o Scheduler Name
 - o Description
3. Click **Create**.
4. In the Scheduler Configuration window, select the **Scheduler Start of Week** from the list.
5. Select the values for the Fitness Formula.

Contact your Oracle Field Service administrator to coordinate the numbers you enter for the Work Zone, Time, and Skill.

More information about fitness formulas can be found in the *Administering Oracle Field Service* guide.

6. Click **OK**.
7. Select the Active checkbox for the schedulers you want to make active.
8. To assign roles to a scheduler, click the **Add** icon and select one or multiple roles from the list. You can also select **Any** if you don't want to select specific roles.

When users are creating or rescheduling a work order, on the Scheduler page, users see the scheduler based on what criteria is met in order of active Schedulers in the table. You can reorder the schedulers from the Actions menu, or by using the Reorder icon.

Here's how it works:

The application looks at the list of schedulers starting with the first active scheduler and evaluates whether that scheduler meets the scheduler criteria. If it does, the user sees that scheduler. If not, the application moves to the next active scheduler in the table until the criteria is met.

For example, let's say you've two schedulers in the table. Scheduler #1 has the role Customer Service Representative. Scheduler#2 has the Customer Service Manager role. When the Customer Service Manager user clicks on the scheduler while creating (or rescheduling) a work order, the scheduler would populate based on Scheduler #2 because Scheduler #1 didn't meet the role criteria.

Tip:

If you've multiple active schedulers, consider having the final scheduler use Any role. Otherwise, if criteria isn't met for any other active scheduler in the list, the user will receive an error message saying there's no scheduler available.

4 Generic Work Orders

Overview of Generic Work Orders

A work order can be any work performed at a customer site, like an installation, standard maintenance, or a repair request. A generic work order isn't integrated to any other application.

Use generic work orders if you need to send field service technicians to resolve customer issues. Generic work orders are turned on and ready to use in Fusion Service.

Work orders can have the following information:

- Customer contact information
- Type of work to be performed
- Date and time the work is scheduled
- Information about part orders

Extend Work Orders UI Elements

You extend UI elements in your Redwood application using Visual Builder Studio.

You can make changes to the user interface, such as displaying custom fields in your work order forms, creating dynamic layouts for a form, or embedding custom content in a dynamic container page.

For information about extending your Work Order UI elements, including setting up Visual Builder Studio, refer the Extend Service Center chapter. The examples in that chapter pertain to the Service Request layouts, but the basics are the same.

