

SCM Cloud

Integrating Service Logistics with Field Service

22B



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1 About This Guide

Audience and Scope

This guide outlines the implementation and configuration steps required to integrate Oracle Fusion Service Logistics and Oracle Field Service Cloud (OFSC) to create a value-added business process and user experience. The administrator must enter the documented configurations and install the documented files to create the integration.

Each implementation of Oracle Field Service Cloud and Oracle Fusion Service Logistics is unique, and leads to the implementation of application customizations that support unique business requirements. While the steps in this document describe how to connect a non-customized Oracle Field Service Cloud instance to a non-customized Oracle Fusion Service Logistics instance, they can be combined with customizations that have already been applied to each instance.

Note: With release 20A (11.13.20.01.0), "Oracle Engagement Cloud" is now known as Oracle CX Sales and Oracle B2B Service. Existing Oracle Engagement Cloud users will retain access to Oracle CX Sales and B2B Service features under their preexisting licensing agreements. Any new users created within your current Oracle Engagement Cloud license count will also retain the same access to Oracle CX Sales and Oracle B2B Service. To obtain additional features or manage your subscription, refer to your Oracle Cloud Applications Console. This document describes features available to users under Oracle CX Sales, Oracle B2B Service, and Oracle Engagement Cloud licensing agreements.

Related Guides

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

Title	Description
Getting Started with Service Logistics Implementation	Lists the steps required to configure Service Logistics
Using Service Logistics	Describes the functionality and user tasks for Service Logistics

2 Introduction

Integration Component Architecture Between Service Logistics and Field Service

Service Logistics enables customers to optimize parts logistics, source and order service parts, record costs and invoice customers. Field Service offers time-based, self-learning, and predictive technology to dispatch field service technicians to resolve customer issues.

The Service Logistics to Field Service integration offers the following:

Field Service Technicians Download: Field Service Technicians are set up as Person Parties in Oracle Fusion Trading Community Model. A usage of 'Field Service Technician' can be associated with a Person Party from several Oracle Cloud User Interfaces (UIs) including the Service Logistics Manage Field Service Technicians setup UI. An Integration Cloud Service is then executed to create the technician in Field Service if the technician doesn't exist or update the technician if they already exist.

Stocking Locations and Inventory Balances Download: Subinventories defined in Oracle Fusion Inventory Management can be set up as Stocking Locations in the Service Logistics Manage Stocking Locations setup UI. Once defined as Stocking Locations, these subinventories are assigned a type of Technician. Stocking Locations can then be assigned to technicians in the Service Logistics Manage Field Service Technicians setup UI. Stocking locations hold parts inventory that technicians use when fixing customer issues. An Integration Cloud Service is executed on a periodic basis that syncs stocking locations and their inventory balances from Inventory Management to Field Service.

Stocking Locations and Inventory Balances Incremental Download: Instead of loading all inventory balances, which may take a long time to complete, only those items are loaded that have been transacted on the same day that the integration is run. This will be a smaller subset of all items and will run much faster. This integration should be set up to run multiple times a day and every day of the week.

Technician Inventory Balances Download: As an alternative to the Stocking Locations and Inventory Balances download, this integration will store the inventory balances directly on the technician resource instead of the truck resource. This is a more common approach among Oracle Field Service Cloud customers. Only inventory balances in the technician's default usable stocking location, as defined in Service Logistics, are synchronized. This integration should only be used if the technician is assigned to only one stocking location.

Technician Inventory Balances Incremental Download: Instead of loading all inventory balances, which may take a long time to complete, only those items are loaded that have been transacted on the same day that the integration is run. This will be a smaller subset of all items and will run much faster. This integration should be set up to run multiple times a day and every day of the week. This integration should be used if the technician is assigned to only one stocking location.

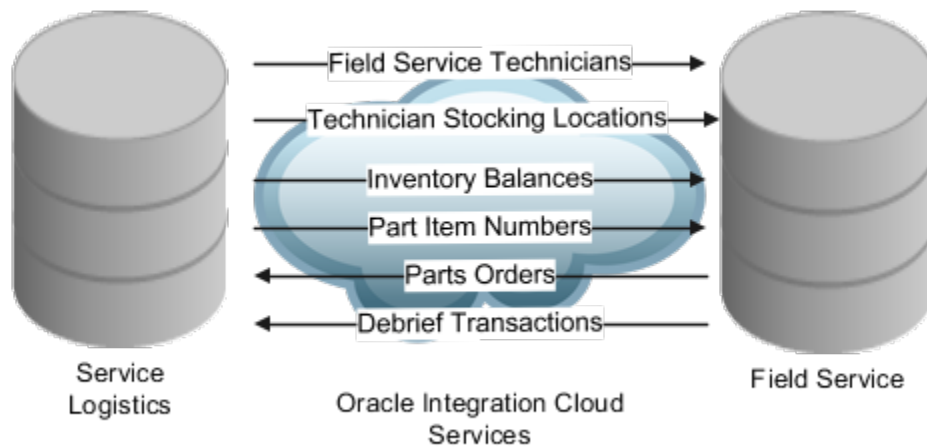
Part Item Number Download: The Supply Chain Cloud parts catalog is downloaded to Oracle Field Service Cloud so that field service technicians know which parts can be ordered.

Parts Orders Integration: From Oracle Field Service Cloud, the technicians can order parts that are required for an activity or they can order parts to replenish their trunk stock. Service Logistics will source the parts and create the transfer orders. Parts orders for an activity will also be visible through the B2B Service work order.

Field Service Debrief Integration: Field service activities are created when a service work order is created in the Oracle B2B Service UIs. Field Service Technicians use the Oracle Field Service Cloud debrief user interface on their mobile

devices to report on the labor hours, parts used and recovered, and any expenses incurred on the activities assigned to them. When the activity is completed, these debrief transactions are automatically created in Service Logistics and are visible in the Manage Charges and Estimates page. Field Service Administrators can then review these debrief transactions, make any adjustments or corrections and post the debrief transaction. This generates a customer invoice for billing, adjusts inventory balances, updates customer's asset configuration, and captures cost of service.

The following figure displays how Oracle Fusion Service Logistics components and Oracle Field Service Cloud components are integrated using Oracle Integration Cloud Service.



Oracle Integration Cloud

The prebuilt integrations are available through Oracle Marketplace. You can log in and install the package directly into your Oracle Integration Cloud instance. The installation includes the following:

Connections

- Connection: Service Logistics CRM REST
- Connection: Service Logistics ESS
- Connection: Service Logistics FA REST
- Connection: Service Logistics FA SOAP
- Connection: Service Logistics OFSC
- Connection: Service Logistics OFSC REST
- Connection: Service Logistics HCM REST
- Connection: Service Logistics Technician
- Connection: Service Logistics OSC

Integrations

- Integration: Service Logistics Technician
- Integration: Service Logistics Inventory
- Integration: Service Logistics Inventory Incremental

- Integration: Service Logistics Technician Inventory
- Integration: Service Logistics Technician Inventory Incremental
- Integration: Service Logistics Order Parts
- Integration: Service Logistics Replenish Parts
- Integration: Service Logistics Debrief
- Integration: Service Logistics Parts Catalog

To access the integrations in Oracle Marketplace, do the following:

1. Access Oracle Marketplace. In the Search field, enter criteria - Oracle Service Logistics Cloud to Oracle Field Service Cloud OIC recipe.
2. Click the "Oracle Service Logistics Cloud to Oracle Field Service Cloud OIC recipe" in the search results.
3. Click Get App.
4. Read and accept the Terms and click Next.

The My Oracle Support page Integrating Oracle Service Logistics Cloud with Oracle Field Service Cloud (Doc ID 2481359.1) opens. This is where you can download the file.

Note: If Oracle Marketplace isn't available, you can download the prebuilt files from My Oracle Support Document 2481359.1 In the Attachments section, select the appropriate attachment for your implementation.

For additional information, you can check the topic 'Integration Component Architecture Between Oracle B2B Service and Oracle Field Service' in the guide - Integrating B2B Service with Field Service.

Related Topics

- [Integration Component Architecture Between Oracle B2B Service and Oracle Field Service](#)

Requirements and Licensing

Subscriptions to the following cloud services are required for implementing the Service Logistics and Field Service integration using Oracle Integration Cloud Service:

- Oracle Fusion Service Logistics: The integration is designed to work with Oracle Fusion Service Logistics Release 21A or later. Note that you can't get a direct subscription to Oracle Fusion Service Logistics. You need to subscribe to other Supply Chain cloud products in order to opt-in for the Service Logistics functional area.
- Oracle Field Service Cloud: The integration is designed to work with Oracle Field Service Cloud Release 21A or later.
- Oracle Integration Cloud Service: The integration is designed to work with Oracle Integration Cloud or Integration Cloud Service(ICS) version 20.3.3.0.0 or later.

3 Service Logistics Configuration

Configure Service Logistics

To configure Service Logistics for this integration, you must do the following:

1. Create the integration user that has the Field Service Administrator job role assigned.
2. Complete the following Service Logistics Setup:
 - Set profile option **Default Parent Resource Name** to match the top node in the resource hierarchy in Oracle Field Service. Note that the **Default Parent Resource Name** is a text field that must exactly match the external name of the resource in Oracle Field Service. The Default Parent Resource Name must be set up in the Work Area lookup before it can be added to this profile.

4 Field Service Configuration

Configure Field Service

To configure Field Service for the integration with Service Logistics, do the following:

1. Set up API Access in the Configuration - Application user interface.
2. Set up the unit of measures for the items that have inventory balances in the technician stocking locations. To do this:
 - a. In Field Service, navigate to Configuration > Properties.
 - b. Search for the property called **UOM**. Enter values for **Unit of Measure** and **UOM Code**.
3. Set up service activity codes for labor debrief.
 - a. Navigate to Configuration > Properties.
 - b. Search for property label **labor_service_activity**.
 - c. Enter values for **Service Activity** and **Service Activity Code**. The service activity code must match the service activity code defined in Service Logistics.
4. Set up service activity codes for labor expense.
 - a. Navigate to Configuration > Properties.
 - b. Search for property label **expense_service_activity**.
 - c. Enter values for **Service Activity** and **Service Activity Code**. The service activity code must match the service activity code defined in Service Logistics.
5. Set up service activity codes for parts used debrief.
 - a. Navigate to Configuration > Properties.
 - b. Search for property label **part_service_activity_used**.
 - c. Enter values for **Service Activity** and **Service Activity Code**. The service activity code must match the service activity code defined in Service Logistics.
6. Set up service activity codes for parts returned debrief.
 - a. Navigate to Configuration > Properties.
 - b. Search for property label **part_service_activity_returned**.
 - c. Enter values for **Service Activity** and **Service Activity Code**. The service activity code must match the service activity code defined in Service Logistics.
7. Set up labor items.
 - a. Navigate to Configuration > Properties.
 - b. Search for property label **labor_item_number**.
 - c. Enter values for labor item. The labor item must match the item number defined in Product Information Management.
8. Set up expense items.
 - a. Navigate to Configuration > Properties.
 - b. Search for property label **expense_item_number**.
 - c. Enter values for expense item. The expense item must match the item number defined in Product Information Management.

5 Oracle Integration Cloud Service Configuration

Configure Oracle Integration Cloud Services

Oracle Integration Cloud Services is used to synchronize Service Logistics field service technicians, stocking locations, inventory balances, and product catalog with Field Service. The following tasks must be performed to set up the secure integration between customer-specific instances:

1. Create the Oracle Integration Cloud User.
2. Import the Oracle Integration Cloud integration flows:
 - a. Login to Oracle Integration Cloud.
 - b. Navigate to Packages.
 - c. Click the **Import** button.
 - d. Select the file downloaded from the Marketplace.
3. Specify connection url and credentials for all Service Logistics connections.
4. Once all connections are defined, activate the Service Logistics integrations.

Refer to the section Oracle Integration Cloud in Chapter 2 for a list of these connections and integrations.

Verify Integration Synchronization

Follow the steps listed below to verify the synchronization.

In Service Logistics:

1. Open the Manage Field Service Technicians user interface.
2. Add a new person as a field service technician and assign a stocking location to the user.
3. In Oracle Integration Cloud, search for integration **Service Logistics Technicians** and select **Submit Now**. If integration completes successfully, login to Oracle Field Service and verify that the technician is available.

In Oracle Integration Cloud, run the Service Logistics Inventory batch program as described below:

1. To run on demand:
 - a. In OIC, navigate to Integrations.
 - b. Search for Service Logistics Inventory.
 - c. Verify that it's activated.
 - d. Click on the menu icon to the right and select **Submit Now**.
2. To run on a schedule:
 - a. In OIC, navigate to Integrations.
 - b. Search for Service Logistics Inventory.
 - c. Verify that it's activated.

- d. Click on the menu icon to the right and select **Schedule**. Follow the instructions to schedule the job according to your business needs.

6 Integration Process Flow

Understand How the Integration Works

To understand how the Service Logistics to Field Service integration works, see the following sections:

Technician Download (Integration Name - Service Logistics Technician) - Service Logistics field service technicians are downloaded to Field Service according to the following steps:

1. The Oracle Integration Cloud flow is a scheduled integration that you can run on demand or on a schedule.
2. A SOAP Service (`PersonService.findPerson`) is called to get a list of all field service technicians.
3. An OFSC Adapter (`resources.Update Resource`) is called to update the technician resource if it already exists.
4. If resource doesn't exist:
 - o A common REST Service (`profileValues`) is called to get the parent node for the resource from profile **Default Parent Resource Name**.
 - o OFSC Adapter (`Resource.Create Resource`) is called to create the resource. The field service technician resource being created will be assigned a parent resource as defined in the profile.
5. The technician details that are downloaded to OFSC include:
 - o Parent Resource
 - o Person Party ID
 - o Full Name
 - o Email
 - o Mobile Phone Number
 - o Status(active/inactive)

Inventory Balances Download (Integration Name - Service Logistics Inventory)- Inventory balances for technician stocking locations are downloaded to Field Service as per the following steps:

1. The Oracle Integration Cloud flow is a scheduled integration that you can run on demand or on a schedule.
2. A Service Logistics REST Service (`stockingLocations` REST API) is called to get all technician stocking locations.
3. OFSC Adapter (`Resource.Get Resource`) is called to check if the stocking location already exists.
4. If stocking location doesn't exist:
 - o OFSC Adapter (`Resource.Create Resource`) is called to create the stocking location as a truck resource. The truck resource is tied to the parent resource (from profile **Default Parent Resource Name**).
5. Service Logistics REST Service (`trunkStocks`) is called to get inventory balances for the stocking location.
6. OFSC REST Service (`resources/custom-actions/bulkUpdateInventories`) is called to replace inventory balances in Field Service.
7. The stocking location details that are downloaded to OFSC include:
 - o Resource ID (Truck ID)
 - o Stocking Location Name (Organization Code + Subinventory Name)
 - o Item Number
 - o Item Description

- o Item Revision
- o Serial Number
- o On-hand Quantity
- o Primary Unit of Measure

Inventory Balances Incremental Download (Integration Name - Service Logistics Inventory Incremental) - Newly updated inventory balances for technician stocking locations are downloaded to Field Service as per the following steps:

1. The Oracle Integration Cloud flow is a scheduled integration that you should run multiple times a day and every day of the week.
2. A Service Logistics REST Service (`stockingLocations` REST API) is called to get all technician stocking locations.
3. OFSC Adapter (`Resource.Get Resource`) is called to check if the stocking location already exists.
4. If stocking location doesn't exist:
 - o OFSC Adapter (`Resource.Create Resource`) is called to create the stocking location as a truck resource. The truck resource is tied to the parent resource (from profile **Default Parent Resource Name**).
5. The Inventory REST Service (`inventoryCompletedTransactions`) is called to find all items that have been transacted on the current day.
6. The Service Logistics REST Service (`trunkStocks`) is called to get inventory balances for the item.
7. The OFSC REST Service (`resources/custom-actions/bulkUpdateInventories`) is called to create or update inventory balances in Field Service.
8. The stocking location details that are downloaded to OFSC include:
 - o Resource ID (Truck ID)
 - o Stocking Location Name (Organization Code + Subinventory Name)
 - o Item Number
 - o Item Description
 - o Item Revision
 - o Serial Number
 - o On-hand Quantity
 - o Primary Unit of Measure

Technician Inventory Balances Download (Integration Name - Service Logistics Technician Inventory)- Inventory balances for technician's default usable subinventory are downloaded to Field Service as per the following steps:

1. The Oracle Integration Cloud is a scheduled integration that you can run on demand or on a schedule.
2. The Service Logistics REST Service (`stockingLocations` REST API) is called to get all the technician default usable stocking locations.
3. The Service Logistics REST Service (`trunkStocks`) is called to get inventory balances for the stocking location.
4. The OFSC REST Service (`resources/custom-actions/bulkUpdateInventories`) is called to replace inventory balances in Field Service.
5. The stocking location details that are downloaded to OFSC include:
 - o Resource ID (Technician Party ID)
 - o Stocking Location Name (Organization Code + Subinventory Name)
 - o Item Number
 - o Item Description
 - o Item Revision

- Serial Number
- On-hand Quantity
- Primary Unit of Measure

Technician Inventory Balances Incremental Download (Integration Name - Service Logistics Technician Inventory Incremental)- Newly updated inventory balances for technician's default usable stocking locations are downloaded to Field Service as per the following steps:

1. The Oracle Integration Cloud is a scheduled integration that you should run multiple times in a day and every day of the week.
2. The Service Logistics REST Service (`stockingLocations` REST API) is called to get all the technician default usable stocking locations.
3. The Inventory REST Service (`inventoryCompletedTransactions`) is called to find all items that have been transacted on the current day.
4. The Service Logistics REST Service (`trunkStocks`) is called to get inventory balances for the item.
5. The OFSC REST Service (`resources/custom-actions/bulkUpdateInventories`) is called to update inventory balances in Field Service.
6. The stocking location details that are downloaded to OFSC include:
 - Resource ID (Technician Party ID)
 - Stocking Location Name (Organization Code + Subinventory Name)
 - Item Number
 - Item Description
 - Item Revision
 - Serial Number
 - On-hand Quantity
 - Primary Unit of Measure

Part Item Number Download (Integration Name - Service Logistics Parts Catalog)- Field Service Technicians need part item numbers to order replacement parts. Part item numbers are downloaded as per the following process:

1. A batch program loads items from the Oracle Product Information Cloud to Field Service using Oracle Integration Cloud. The batch program is an OIC integration program that can be run on demand or scheduled to run from OIC.
2. This integration downloads all items for the inventory organization defined in profile 'Default Inventory Organization'. Only items with Service Logistics Billing Type tied to Billing Category = Material are included. The item details downloaded include:
 - Item Number
 - Item Description
 - Item Revision
 - Primary Unit of Measure

Note: It is required that labor and expense items must be set up in OFSC to match the labor and expense items in the item master in Product Information Management. See Chapter 4 for details.

Order Parts for an Activity (Integration Name - Service Logistics Order Parts)- Parts orders integration between Service Logistics and Field Service occurs as follows:

1. Field service technicians click the **Order** button to order parts from OFSC using Service Logistics.

2. This creates an order activity in OFSC.
3. Step 1 raises an event that triggers the integration.
4. An OFSC Adapter (`Activity Inventory`) is called to get all the parts ordered by the technician.
5. The data elements passed from OFSC to Service Logistics are:
 - o Item Number
 - o Quantity
 - o Unit of Measure
 - o Ship To Address Type (Technician or Customer)
 - o Work Order ID (B2B Service Work Order ID)
6. A Service Logistics REST service (`partRequirementLines`) is called to create part requirements and find a supply SOURCE (`partRequirementLines/{partsReqLineId}/action/getPreferredSource`).
7. The supply orchestration REST service (`supplyRequests`) is used to create the transfer order to ship the parts to the technician or to the customer site.
8. The parts ordered by the field service technician for the work order show up in the Oracle Field Service Work Order along with other parts ordered by the agent using the B2B Service pages.
9. If the part isn't found, a backorder is created for the replenishment source.
10. The following is downloaded to OFSC:
 - o Transfer order number
 - o Order activity status
 - o Transfer order header ID

Note that field service technicians can order more than one part number and more than one quantity of the part.

Order Parts to Replenish Trunk Stock (Integration Name - Service Logistics Replenish Parts)- Parts orders integration between Service Logistics and Field Service occurs as follows:

1. Field service technicians click the **Order** button to order parts from OFSC to replenish their trunk stock.
2. This creates an order activity in OFSC.
3. Step 1 raises an event that triggers the integration.
4. An OFSC Adapter (`Activity Inventory`) is called to get all the parts ordered by the technician.
5. The data elements passed from OFSC to Service Logistics are:
 - o Item Number
 - o Quantity
 - o Unit of Measure
 - o Ship To Address Type (Technician or Customer)
 - o Work Order ID (B2B Service Work Order ID)
6. A Service Logistics REST service (`partRequirementLines`) is called to create part requirements and find a supply SOURCE (`partRequirementLines/{partsReqLineId}/action/getPreferredSource`).
7. The supply orchestration REST service (`supplyRequests`) is used to create the transfer order to ship the parts to the technician or to the customer site.
8. If the part isn't found, a backorder is created for the replenishment source.
9. The following is downloaded to OFSC:
 - o Transfer order number
 - o Order activity status

- Transfer order header ID

Note that field service technicians can order more than one part number and more than one quantity of the part.

Debrief Integration (Integration Name - Service Logistics Debrief)- Debrief integration between Field Service and Service Logistics happens as follows:

1. When the technician completes the activity in Field Service, an event is raised that triggers this integration.
2. A Field Service REST service (`activities/{activityId}/installedInventories`) is called to fetch all the labor, parts, and expense debrief lines.
3. A Field Service REST service (`activities/{activityId}/deinstalledInventories`) is called to fetch all returned parts.
4. A Service Logistics REST service (`debriefs/{debriefHeaderId}/child/lines`) is called to create the debrief transactions, create the charges, and create reservations for the parts used (the reservation is released when charges are posted).
5. Field service administrators can then review, correct, and post these transactions to generate sales invoice, update parts inventory and update asset configuration.
6. The debrief information uploaded to Service Logistics include:
 - a. Labor Debrief
 - Service Activity
 - Labor Item
 - Start Time
 - End Time
 - b. Material Debrief
 - Service Activity
 - Item Number
 - Quantity
 - Unit of Measure
 - c. Expense Debrief
 - Service Activity
 - Expense Item
 - Amount
 - Currency Code

