



Work Type Management

ⓘ This feature has been discontinued. You can now use its updated and improved version: [Record Templates](#)

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 [service](#) to link the skills and parts to a service. When a service (with which a work type is linked) is added to a [work order](#), the skills and parts associated with the service automatically get added to the work order.

ⓘ **Permission Required:** [Work Types](#)
Check the Edition-based availability of [Work Type](#).

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 ⊖ to delete the part entries.
4. Click + **New Line** to add **Skills** required for the work type and click **Save**. Use ⊖ to delete the skill entries.

Create Work Type
✕

Work Type

Work Type Name

Estimated Duration

Estimated Time Unit

Description

Parts

Part	Quantity
<input style="width: 90%;" type="text" value="Scrubbing Brush with Handle"/>	1 ⊖
<input style="width: 90%;" type="text" value="Carpet & Rug Shampoo and Cle;"/>	1 ⊖
<input style="width: 90%;" type="text" value="Oxi Action Carpet Stain Remove"/>	2 ⊖

+ New Line

Skills

Skill

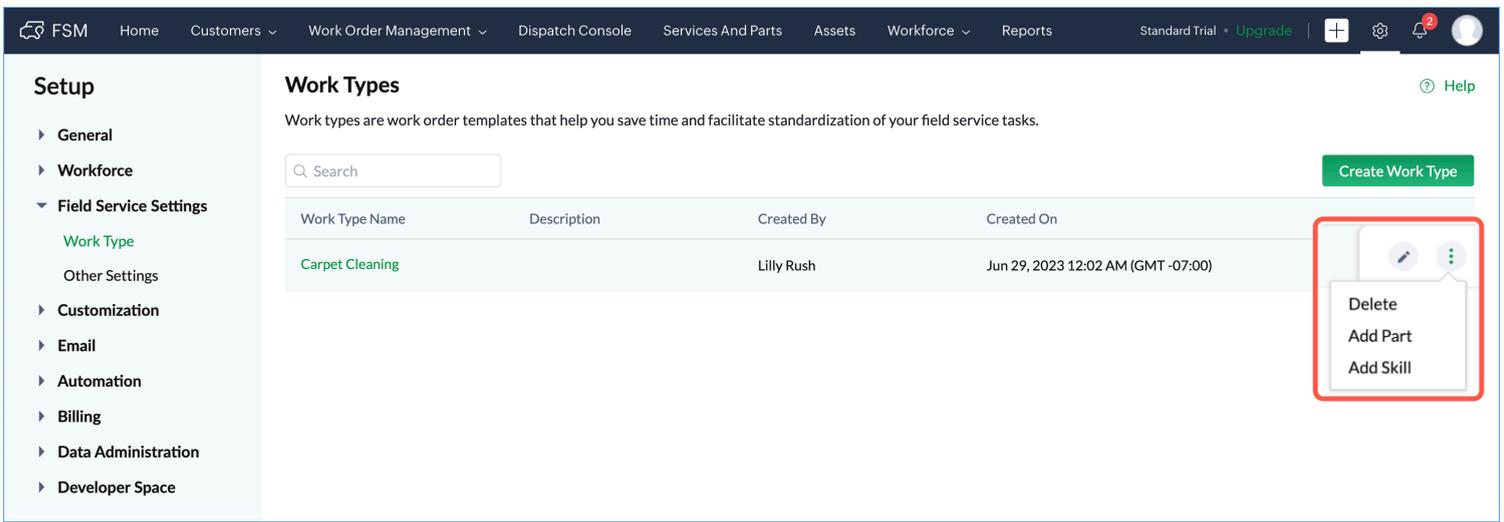
⊖

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.



Click on the work type to view its details. In the *Work Type* overlay, you can find the **Edit** and **Delete** options.

