

Sample. Ashgrove Facilities is an invented company. This is the one-page summary that comes with a census, written by a person, for the decision in front of the client.

ONE-PAGE SUMMARY · READ WITH THE CENSUS

Ashgrove Facilities

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The decision: Ashgrove is moving its field service work onto a new scheduling setup next quarter and wants a fixed quote for it. These are the things in the org that change the size of that job. Each is set out in full, with its numbers, in the census.

What changes the size of the job

1 The org is already over its storage allowance, by 16%.

Going over means buying more storage from Salesforce or clearing some. Of its 18 million rows, 14 million are files, logs and history the platform keeps. Rows don't all cost the same, so find out what is actually taking the space, and decide what to clear before anything new is loaded on top.

2 Nine in ten of the automations belong to vendors, not to Ashgrove.

118 of 127 active triggers come from installed packages, mostly Field Service itself. They can't be edited, only worked around, so any change to how jobs move needs testing against them. Budget for that testing.

3 Old jobs carry values the current setup doesn't allow.

18,204 work orders hold a cancellation reason that is no longer an option, all from before the last year. A migration or a validation rule will reject or mis-file them. Decide now whether to map, retire or leave them.

4 The appointment "due date" isn't a deadline. It's a default.

On 1,962 of the last 2,000 appointments it is exactly 14 days after the earliest start. Any report of overdue work, any SLA figure, and any AI feature that reads this date is reading a rule, not a commitment.

5 A third of job line items sit far from their own job on the map.

31,880 of 88,420 are placed at least 70 km from their work order. If the new setup routes or plans from a line item's location, it will plan from the wrong place.

6 A lot was built that nobody fills in.

170 of the 457 custom fields Ashgrove built are filled in on fewer than 1 record in 20, and 8 fields added in the last 20 months have never held a value. Agree which to leave behind before quoting to move them.

What's fine

✓ File storage at 29%

✓ No record ends before it starts

✓ No date outside 1900–2100

Three questions for Ashgrove's team

- Who sets the appointment due date, and does anyone report on it as a deadline?
- Does anything in the business read a line item's location, or only the job's?
- Are the snapfield licences (15 of 15 in use, renewing on 30 November) being renewed at the same size?

This page is a judgement, written for one decision. The census beside it holds only measured facts. Where the two seem to disagree, the census is the record.