

Project Title: Field Service WorkOrder Optimization

Team ID : LTVIP2025TMID31031

Team Size : 4

Start date : 15 June 2025

End date : 20 June 2025

6.PROJECT EXECUTABLE FILES

This phase outlines the actual Salesforce configurations, data, and outcomes used and generated during the execution of our project: “Field Service Work Order Optimization. “It ensures that all key project elements-objects, data, and output-are traceable and reusable for future reference or assessment. Where practical configurations and working modules of the project are documented for clarity, replication, and validation.

1. Project Files

Project Executable Files

The following project files were executed in the Salesforce Developer Org:

Milestone 1: Developer Account Setup

Milestone 2: Object Creation

Milestone 3: Tab Creation

Milestone 4: Lightning App Setup

Milestone 5: Field & Relationship

Milestone 6: Profiles

Milestone 7: Users

Milestone 8: Apex Trigger

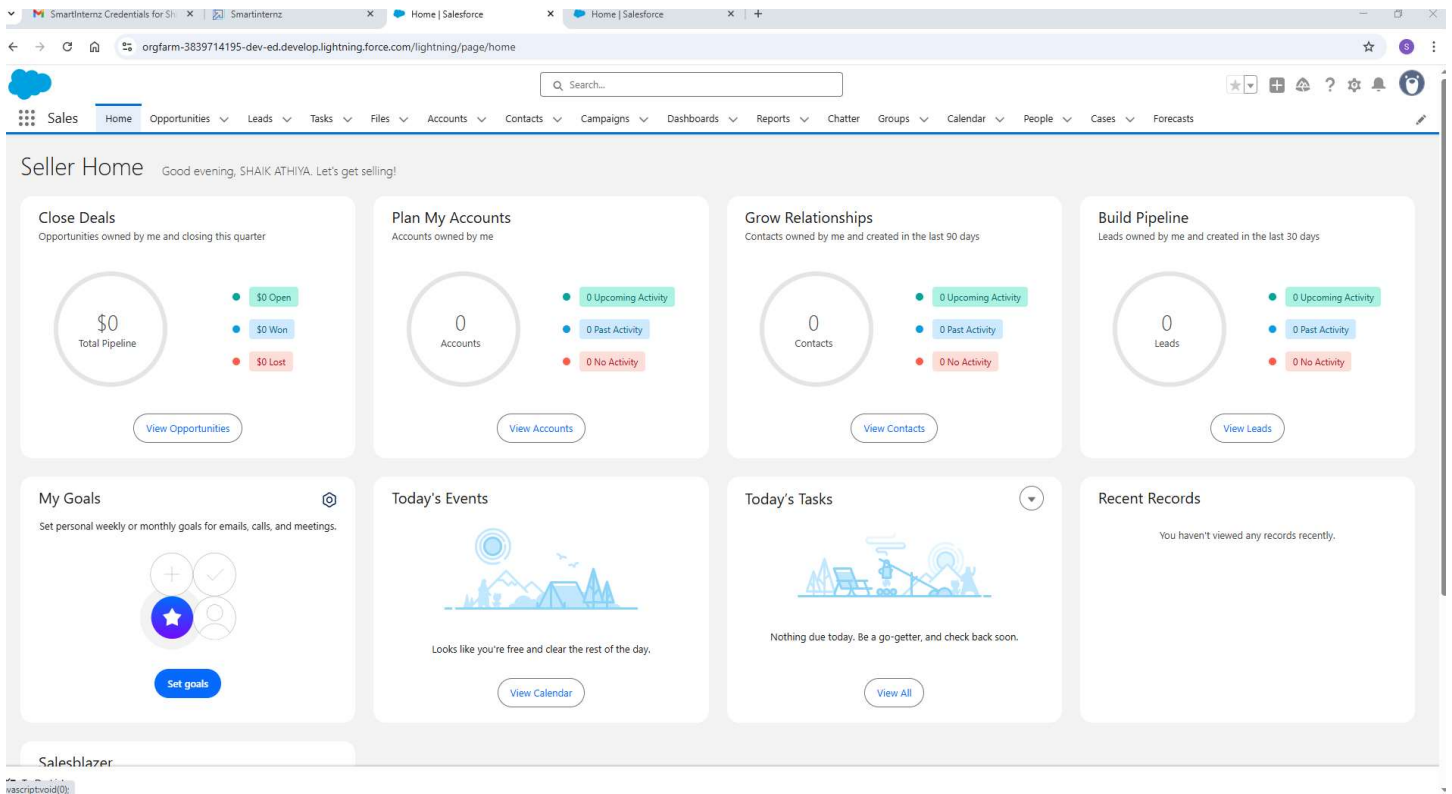
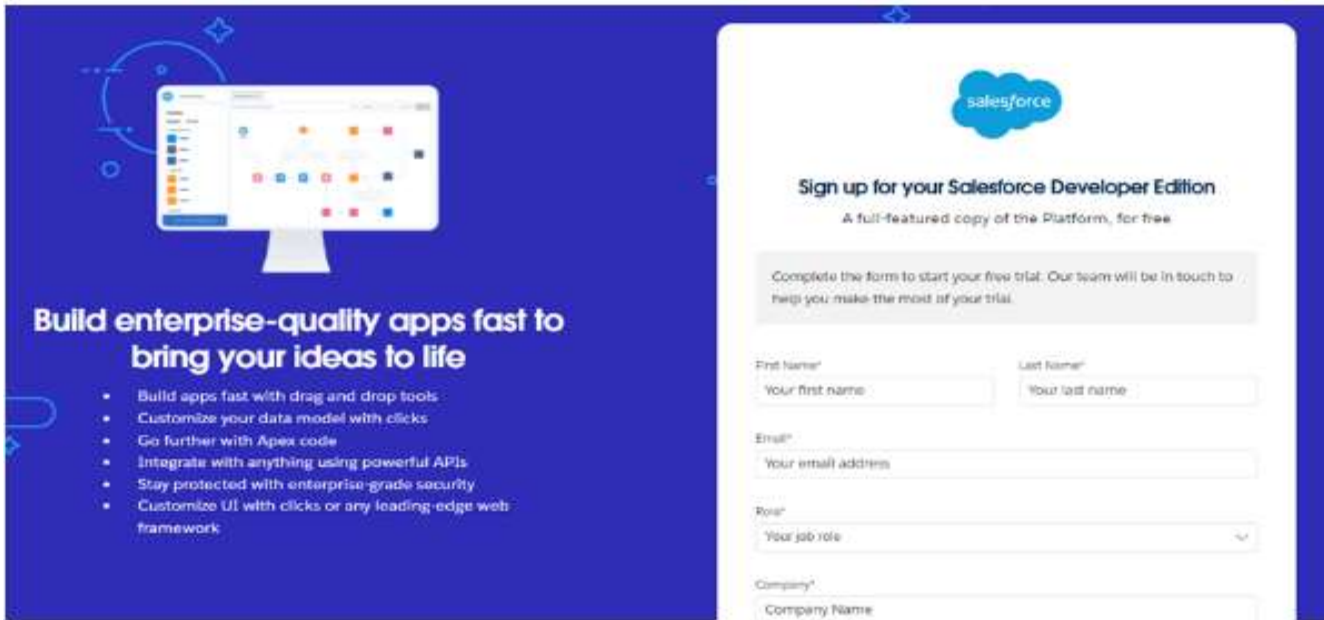
Milestone 9: Reports and Dashboards

List of Milestone Tasks with Supporting Screenshots and Descriptions

Milestone 1: Developer Account Setup

- Created and activated a Salesforce Developer Org.
- Setup the base environment for Field Service Work Order optimization development.
- Verified access to Object Manager, Users, Profiles, App Builder.

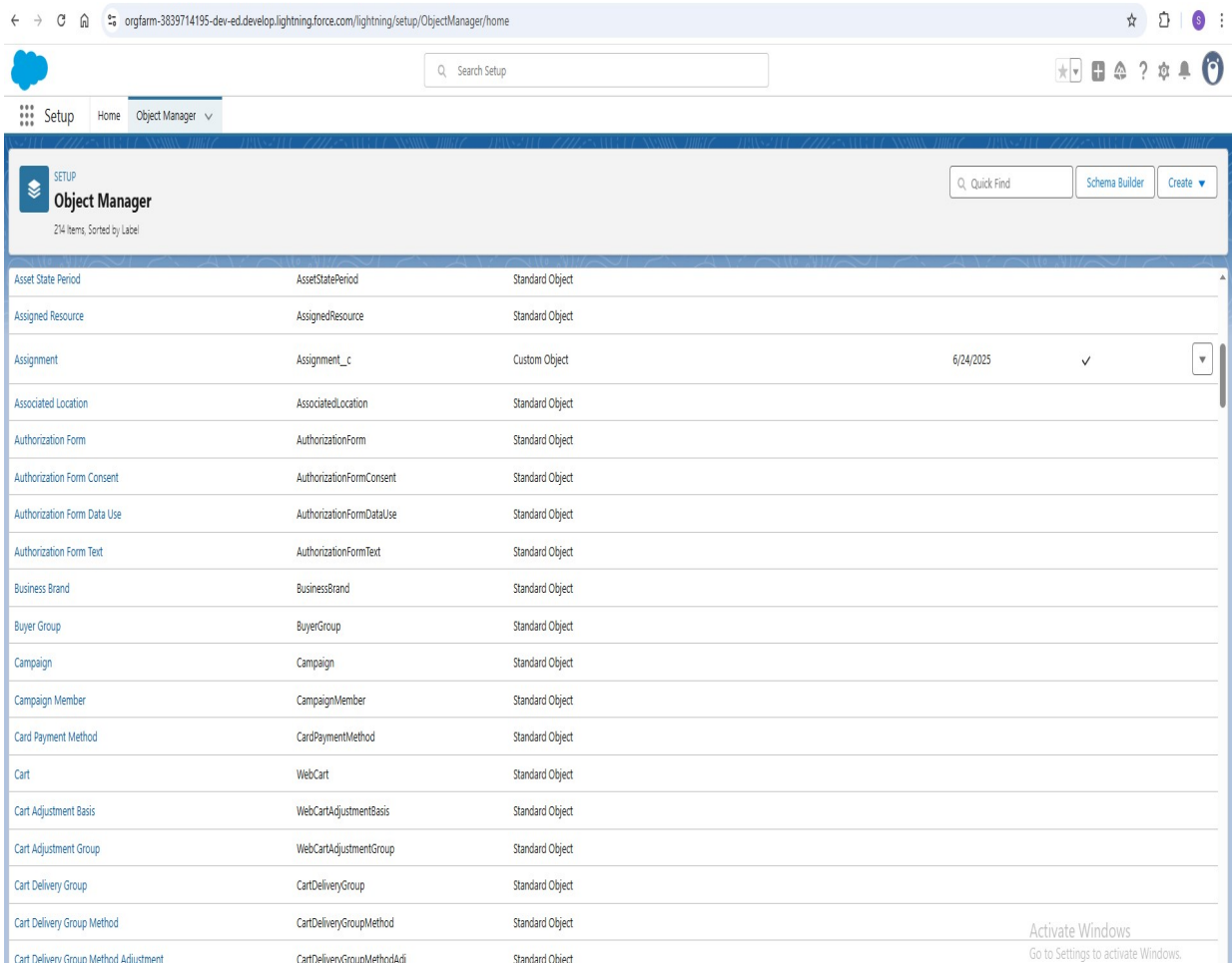
OUTPUT SCREENSHOT:-



Milestone 2: Object Creation

- Created 3 custom objects:
 - WorkOrder, Technician, Assignment
- Established users, profiles.
- Configured relationships using lookup fields.


OUTPUT SCREENSHOT:-









The screenshot displays the Salesforce Object Manager interface. The browser address bar shows the URL: `orgfarm-3839714195-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes the Salesforce logo, a search bar labeled "Search Setup", and navigation tabs for "Setup", "Home", and "Object Manager". The main content area is titled "Object Manager" and shows a list of 214 items, sorted by label. The list includes various standard and custom objects, such as "Asset State Period", "Assigned Resource", "Assignment", "Associated Location", "Authorization Form", "Authorization Form Consent", "Authorization Form Data Use", "Authorization Form Text", "Business Brand", "Buyer Group", "Campaign", "Campaign Member", "Card Payment Method", "Cart", "Cart Adjustment Basis", "Cart Adjustment Group", "Cart Delivery Group", "Cart Delivery Group Method", and "Cart Delivery Group Method Adjustment". The "Assignment" object is highlighted as a custom object, with a date of 6/24/2025 and a checkmark indicating it is active. The interface also features a "Quick Find" search bar, a "Schema Builder" button, and a "Create" button.

Object Name	Object API Name	Object Type	Last Modified	Status
Asset State Period	AssetStatePeriod	Standard Object		
Assigned Resource	AssignedResource	Standard Object		
Assignment	Assignment_c	Custom Object	6/24/2025	✓
Associated Location	AssociatedLocation	Standard Object		
Authorization Form	AuthorizationForm	Standard Object		
Authorization Form Consent	AuthorizationFormConsent	Standard Object		
Authorization Form Data Use	AuthorizationFormDataUse	Standard Object		
Authorization Form Text	AuthorizationFormText	Standard Object		
Business Brand	BusinessBrand	Standard Object		
Buyer Group	BuyerGroup	Standard Object		
Campaign	Campaign	Standard Object		
Campaign Member	CampaignMember	Standard Object		
Card Payment Method	CardPaymentMethod	Standard Object		
Cart	WebCart	Standard Object		
Cart Adjustment Basis	WebCartAdjustmentBasis	Standard Object		
Cart Adjustment Group	WebCartAdjustmentGroup	Standard Object		
Cart Delivery Group	CartDeliveryGroup	Standard Object		
Cart Delivery Group Method	CartDeliveryGroupMethod	Standard Object		
Cart Delivery Group Method Adjustment	CartDeliveryGroupMethodAdj	Standard Object		

← → ↻ 🔍 orgfarm-3839714195-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home



Search Setup



SetupHomeObject Manager

SETUP

Object Manager

18 Items, Sorted by Label


work

Schema Builder







Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Agent Work	AgentWork	Standard Object			
Approval Work Item	ApprovalWorkItem	Standard Object			
Engagement Channel Work Type	EngagementChannelWorkType	Standard Object			
Orchestration Work Item	FlowOrchestrationWorkItem	Standard Object			
Service Territory Work Type	ServiceTerritoryWorkType	Standard Object			
Shift Work Topic	ShiftWorkTopic	Standard Object			
Waitlist Work Type	WaitlistWorkType	Standard Object			
Work Order	WorkOrder	Standard Object			
Work Order Line Item	WorkOrderLineItem	Standard Object			
Work Plan	WorkPlan	Standard Object			
Work Plan Template	WorkPlanTemplate	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			
Work Step	WorkStep	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Type	WorkType	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type Group Member	WorkTypeGroupMember	Standard Object			
WorkOrder	WorkOrder__c	Custom Object		6/25/2025	Activate Windows Go to Settings to activate Windows.

← → ↻ 🔍 orgfarm-3839714195-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home



Search Setup



SetupHomeObject Manager

SETUP

Object Manager

1 Items, Sorted by Label

tech

Schema Builder

Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Technician	Technician__c	Custom Object		6/23/2025	✓

Milestone 3:Tab Creation

- Created tabs for each custom object.
- Enabled easy navigation and object access in the app.
- Ensured users can create/view records from the UI

OUTPUT SCREENSHOT:-

The screenshot shows the Salesforce Setup interface for Custom Tabs. The browser address bar displays the URL: `orgfarm-3839714195-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home`. The left sidebar contains the Setup menu with options like Home, Object Manager, and a search bar. The main content area is titled "Custom Tabs" and includes a "Help for this Page" link. Below the title, there is a descriptive paragraph about custom tabs. The page is divided into four sections: Custom Object Tabs, Web Tabs, Visualforce Tabs, and Lightning Component Tabs. Each section has a "New" button and a "What is This?" link. The Custom Object Tabs section contains a table with columns for Action, Label, Tab Style, and Description. The table lists three tabs: "Assignments" (with a "New" button), "Technician" (with a "New" button), and "WorkOrder" (with a "New" button). The Web Tabs, Visualforce Tabs, and Lightning Component Tabs sections all show "No [Tab Type] Tabs have been defined".

orgfarm-3839714195-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Setup Home Object Manager

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	Assignments	New What is This?	
Edit Del	Technician	New What is This?	
Edit Del	WorkOrder	New What is This?	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

No Lightning component tabs have been defined

Lightning Page Tabs

No Lightning Page Tabs have been defined

Milestone 4: Lightning App Setup

- Built a custom Lightning App named "Field Service WorkOrder Optimization".
- Added relevant tabs to centralize operations
- Created objects for fields and records

orgfarm-3839714195-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app manager

App Manager

External Client Apps

External Client App Manager

Didn't find what you're looking for? Try using Global Search.

Lightning Experience App Manager

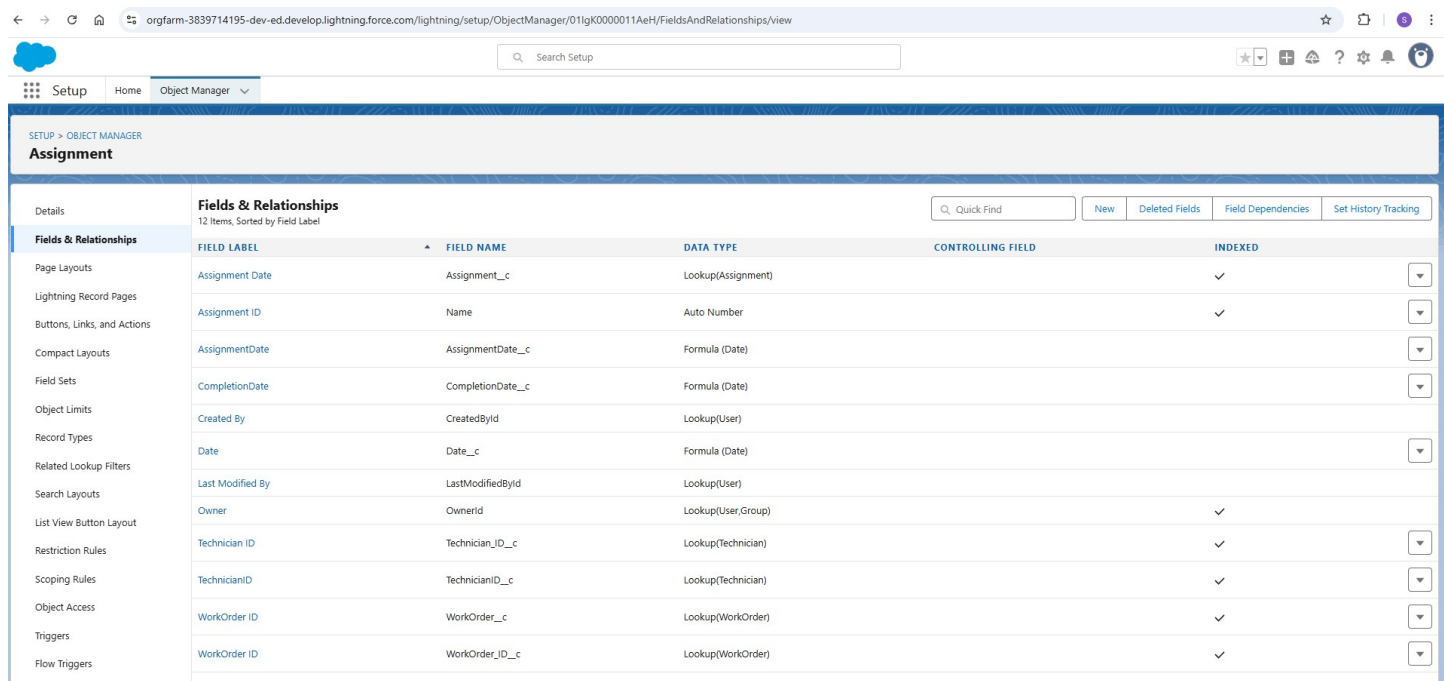
27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visible in L...
3 App Launcher	AppLauncher	App Launcher tabs	6/16/2025, 12:48 PM	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	6/16/2025, 12:48 PM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	6/16/2025, 12:56 PM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	6/16/2025, 12:48 PM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	6/16/2025, 12:48 PM	Classic	✓
8 Content	Content	Salesforce CRM Content	6/16/2025, 12:48 PM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	6/16/2025, 12:48 PM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	6/16/2025, 12:48 PM	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	6/16/2025, 12:48 PM	Lightning	✓
12 Field Service WorkOrder Optimization	Field_Service_WorkOrder_Optimization		6/23/2025, 6:09 AM	Lightning	✓
13 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	6/16/2025, 12:48 PM	Lightning	✓
14 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	6/16/2025, 12:48 PM	Classic	✓
15 My Service Journey	MSJApp	Discover new customer service capabilities.	6/16/2025, 12:48 PM	Lightning	✓
16 Platform	Platform	The fundamental Lightning Platform	6/16/2025, 12:48 PM	Classic	✓
17 Queue Management	QueueManagement	Create and manage queues for your business.	6/16/2025, 12:48 PM	Lightning	✓
18 Sales	Sales	The world's most popular sales force automation (SFA) solution	6/16/2025, 12:48 PM	Classic	✓
19 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	6/16/2025, 12:48 PM	Lightning	✓
20 Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	6/16/2025, 12:48 PM	Lightning	✓
21 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	6/16/2025, 12:48 PM	Lightning	✓
22 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	6/16/2025, 12:48 PM	Classic	✓
23 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	6/16/2025, 12:53 PM	Lightning	✓

Milestone 5:Fields and Relationships

- Added custom and formula fields like:
- Lookup(Technician)
- Formula:returntype:Date
(WorkOrder_ID__r.Date__c)
- Formula:returntype:Date
IF(ISPICKVAL(WorkOrder_ID__r.Status__c, 'Resolved'),
WorkOrder_ID__r.LastModifiedDate , NULL)
- CreatedDate

➤ Assignment Fields and Relationships



The screenshot shows the Salesforce Setup interface for the 'Assignment' object. The left sidebar contains a navigation menu with categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, and Flow Triggers. The main content area is titled 'Assignment' and 'Fields & Relationships', showing 12 items sorted by Field Label. The table lists various fields with their labels, names, data types, controlling fields, and indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Assignment Date	Assignment__c	Lookup(Assignment)		✓
Assignment ID	Name	Auto Number		✓
AssignmentDate	AssignmentDate__c	Formula (Date)		
CompletionDate	CompletionDate__c	Formula (Date)		
Created By	CreatedById	Lookup(User)		
Date	Date__c	Formula (Date)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Technician ID	Technician_ID__c	Lookup(Technician)		✓
TechnicianID	TechnicianID__c	Lookup(Technician)		✓
WorkOrder ID	WorkOrder__c	Lookup(WorkOrder)		✓
WorkOrder ID	WorkOrder_ID__c	Lookup(WorkOrder)		✓

➤ WorkOrder Fields and Relationships

SETUP > OBJECT MANAGER				
WorkOrder				
Details	Fields & Relationships			
	12 Items, Sorted by Field Label			
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)	
Lightning Record Pages	Description	Description__c	Long Text Area(131072)	
Buttons, Links, and Actions	Email	Email__c	Email	
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)	
Field Sets	Location	Location__c	Picklist	
Object Limits	Owner	OwnerId	Lookup(User,Group)	✓
Record Types	Priority	Priority__c	Picklist	
Related Lookup Filters	Record Count	Record_Count__c	Picklist	
Search Layouts	RecordCount	RecordCount__c	Picklist	
List View Button Layout	Service Type	Service_Type__c	Picklist	
Restriction Rules	Status	Status__c	Picklist	
Scoping Rules	WorkOrder ID	Name	Text(80)	✓
Object Access				
Triggers				
Flow Triggers				

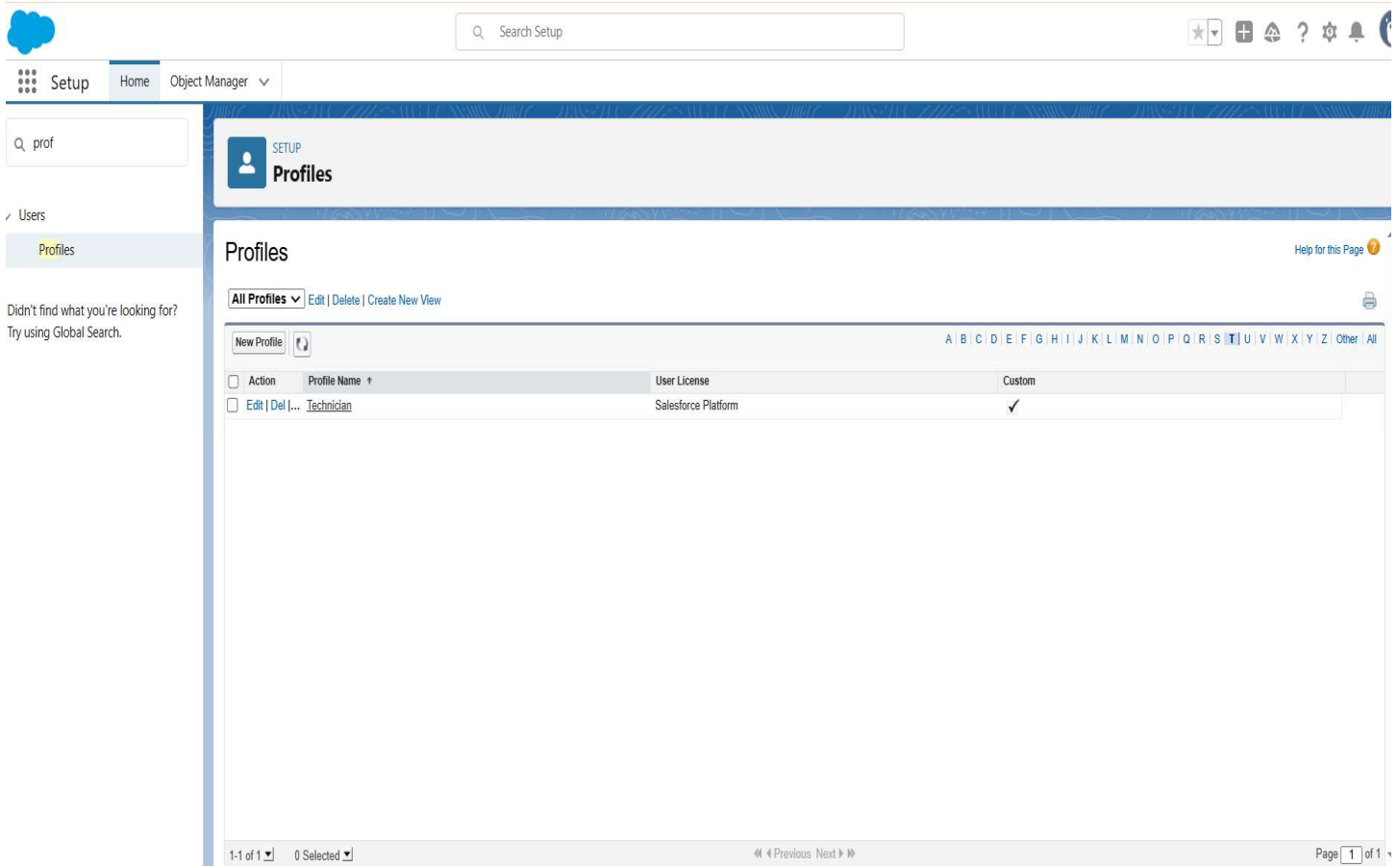
➤ Technician Fields and Relationships

SETUP > OBJECT MANAGER				
Technician				
Details	Fields & Relationships			
	10 Items, Sorted by Field Label			
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD INDEXED
Page Layouts	Availability	Availability__c	Picklist	
Lightning Record Pages	Created By	CreatedById	Lookup(User)	
Buttons, Links, and Actions	Email	Email__c	Email	
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)	
Field Sets	Location	Location__c	Picklist	
Object Limits	Name	Name__c	Text(255)	
Record Types	Owner	OwnerId	Lookup(User,Group)	✓
Related Lookup Filters	Phone	Phone__c	Phone	
Search Layouts	Skills	Skills__c	Picklist	
List View Button Layout	Technician ID	Name	Text(80)	✓
Restriction Rules				
Scoping Rules				
Object Access				

Milestone 6: Profiles

➤ Created a technician profile

OUTPUT SCREENSHOTS:-



The screenshot displays the Salesforce Setup interface for the 'Profiles' section. The left sidebar shows the navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Profiles' and includes a search bar, a 'New Profile' button, and a table of existing profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. One profile is listed: 'Technician' with the 'Salesforce Platform' license and a checked 'Custom' checkbox. The bottom of the page shows pagination information: '1-1 of 1', '0 Selected', and 'Page 1 of 1'.

Action	Profile Name	User License	Custom
Edit Del ...	Technician	Salesforce Platform	✓

Milestone 7: Users

➤ Created user named “Elina Gilbert”

OUTPUT SCREENSHOT:-

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector

Users

Didn't find what you're looking for?

Try using Global Search.

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Profile

SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users

Edit

Create New View

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/>	Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00d9k000005ax8luaq.rs19nvuqdkql@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	EPIC_OrgFarm	OEPIQ	spic.90f66f16bf18@orgfarm.com		✓	System Administrator
<input type="checkbox"/>	Edit	FIRDIOUS_SHAIKATHIYA	ath	athivanoor75362@agentforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	Gilbert_Elina	elina	elina@athiya.com		✓	Technician
<input type="checkbox"/>	Edit	User_Integration	intag	integration@00d9k000005ax8luaq.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00d9k000005ax8luaq.com		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

Milestone 8: Apex Trigger

- Developed a trigger to validate
 - Apex Trigger name as “WorkOrderTrigger” and “Assignment Trigger”
 - Created schedule apex named as “Schedule class”
 - Created apex triggers using developerconsole

OUTPUT SCREENSHOTS:-

The screenshot shows the Salesforce Setup console for the 'Apex Triggers' page. The left sidebar contains a navigation menu with categories like Feature Settings, Chatter, Groups, Triggers, Topics, Objects and Fields, and Custom Code. The 'Apex Triggers' link is highlighted. The main content area displays the 'Apex Triggers' page with a header, a description, a 'Percent of Apex Used' warning, and a table of triggers.

Apex Triggers

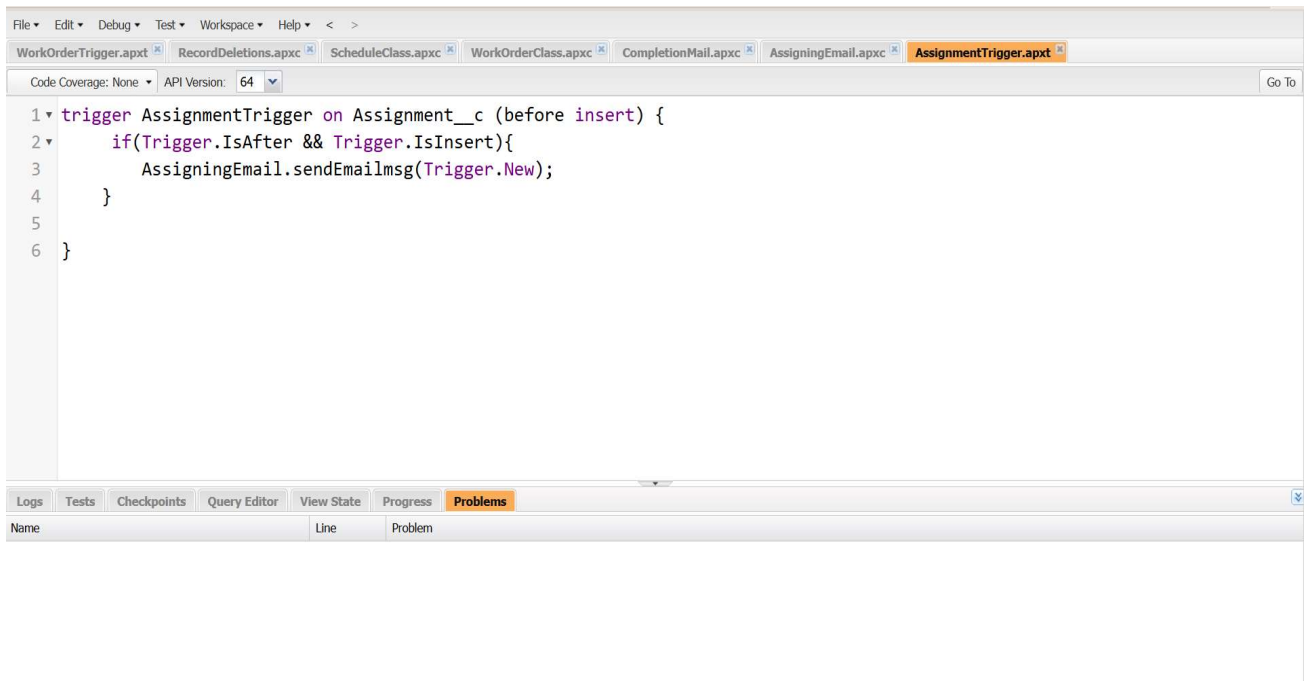
This page allows you to view and modify all the triggers in your organization. To create a new trigger, navigate to the appropriate sObject triggers page.

Percent of Apex Used: 0.09%
You are currently using 5,220 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

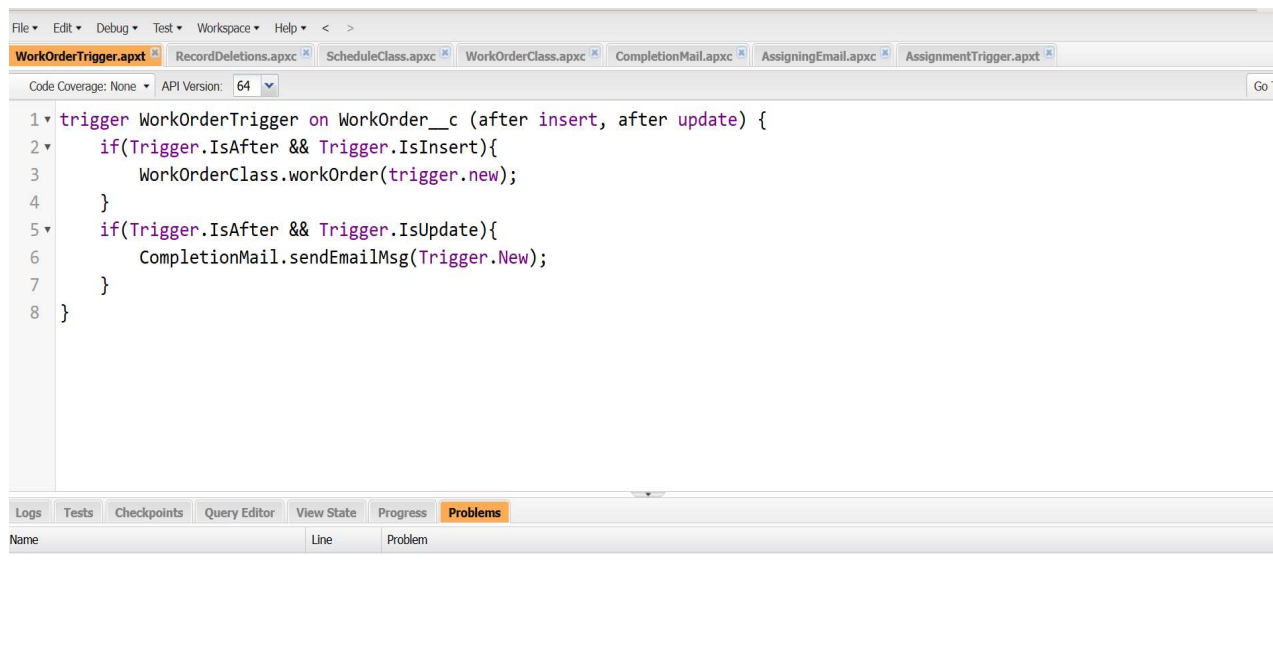
Control all triggers | View: [All] | Create New View

Action	Name	Namespace Prefix	sObject Type	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del	AssignmentTrigger		Assignment	64.0	Active	165	SHAIKATHIYA FIRDIOUS, 6/24/2025, 12:33 AM	<input type="checkbox"/>
Edit Del	WorkOrderTrigger		WorkOrder	64.0	Active	274	SHAIKATHIYA FIRDIOUS, 6/24/2025, 4:28 AM	<input type="checkbox"/>

➤ Assignment Trigger in developer console :



➤ WorkOrder trigger in developerconsole:-



File Edit Debug Test Workspace Help < >

WorkOrderTrigger.apxt RecordDeletions.apxc ScheduleClass.apxc WorkOrderClass.apxc CompletionMail.apxc AssigningEmail.apxc AssignmentTrigger.apxt

Code Coverage: None API Version: 64 Go To

```
1 public class RecordDeletions Implements Database.Batchable<Subject>{
2
3     public Database.QueryLocator start(Database.BatchableContext bc) {
4
5         string query = 'SELECT Id, Name, WorkOrder_ID__c, Technician_ID__c, Assignment_Date__c, Completion_Date__c FROM Assignment
6
7         return database.GetQueryLocator(query);
8
9     }
10
11     public void execute(Database.BatchableContext bc, List<Assignment__c> query){
12
13         if(!Query.IsEmpty()){
14
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name	Line	Problem
------	------	---------

File Edit Debug Test Workspace Help < >

WorkOrderTrigger.apxt RecordDeletions.apxc ScheduleClass.apxc WorkOrderClass.apxc CompletionMail.apxc AssigningEmail.apxc AssignmentTrigger.apxt

Code Coverage: None API Version: 64 Go To

```
1 global class ScheduleClass implements Schedulable {
2     global void execute(SchedulableContext SC) {
3         RecordDeletions delrec = new RecordDeletions();
4         database.executeBatch(delrec, 200);
5     }
6 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name	Line	Problem
------	------	---------

File Edit Debug Test Workspace Help < >

WorkOrderTrigger.apxt RecordDeletions.apxc ScheduleClass.apxc WorkOrderClass.apxc CompletionMail.apxc AssigningEmail.apxc AssignmentTrigger.apxt

Code Coverage: None API Version: 64 Go To

```
1 public class WorkOrderClass {
2     public static void workOrder(List<WorkOrder__c> newListWorkOrder){
3         Map<Integer, List<String>> maptotech = new map<Integer,List<String>>();
4         integer num = 0;
5         List<WorkOrder__c> properWo = new List<WorkOrder__c>();
6         List<Assignment__c> lstAssignment = new List<Assignment__c>();
7         List<Technician__c> technicianToAssignment = new List<Technician__c>();
8         for(WorkOrder__c iter : newListWorkOrder){
9             List<String> lststring = new List<string>();
10            If(iter.Service_Type__c != null && iter.Location__c != null ){
11                num = num+1;
12                properWo.add(iter);
13                lststring.add(iter.Service_Type__c);
14                lststring.add(iter.Location__c);
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name	Line	Problem
------	------	---------

File Edit Debug Test Workspace Help < >

WorkOrderTrigger.apxt RecordDeletions.apxc ScheduleClass.apxc WorkOrderClass.apxc CompletionMail.apxc AssigningEmail.apxc AssignmentTrigger.apxt

Code Coverage: None API Version: 64 Go To

```
1 public class CompletionMail {
2     public static void sendEmailMsg(List<WorkOrder__c> workOrderList){
3         List<messaging.SingleEmailMessage> myVar = new List<messaging.SingleEmailMessage>();
4         for(WorkOrder__c con : workOrderList){
5             if(con.Status__c == 'Resolved'){
6                 messaging.SingleEmailMessage mail = new messaging.SingleEmailMessage();
7                 List<String> sendTo = new List<String>();
8                 sendTo.add(con.Email__c);
9                 mail.setToAddresses(sendTo);
10                string subject = 'Status Updated';
11                mail.setSubject(subject);
12                string body = 'email body ';
13                mail.setHTMLbody(body);
14                myVar.add(mail);
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name	Line	Problem
------	------	---------

```
File Edit Debug Test Workspace Help < >
WorkOrderTrigger.apxt RecordDeletions.apxc ScheduleClass.apxc WorkOrderClass.apxc CompletionMail.apxc AssigningEmail.apxc AssignmentTrigger.apxt
Code Coverage: None API Version: 64 Go To

1 public class AssigningEmail {
2     public static void sendEmailmsg(List<Assignment__c> assRec){
3         List<messaging.SingleEmailMessage> myVar = new List<messaging.SingleEmailMessage>();
4         Map<id, Technician__c> technicians = new Map<id, Technician__c>([SELECT Id, Phone__c, Location__c, Skills__c, Name__c]);
5         try{
6             for(Assignment__c con : assRec){
7                 if(con.Technician_ID__c != null){
8                     messaging.SingleEmailMessage mail = new messaging.SingleEmailMessage();
9                     List<String> sendTo = new List<String>();
10                    sendTo.add(technicians.Get(con.Technician_ID__c).Email__c);
11                    mail.setToAddresses(sendTo);
12                    string subject = 'WorkOrder Assignment ';
13                    mail.setSubject(subject);
14                    string body = 'The following WorkOrder has been assigned to you ';
15                    mail.setHTMLbody(body);
16                    myVar.add(mail);
17                }
18            }
19            Messaging.sendEmail(myVar);
20        }
21        catch(exception e){

```


Milestone 9: Reports and Dashboards

- **Reports**

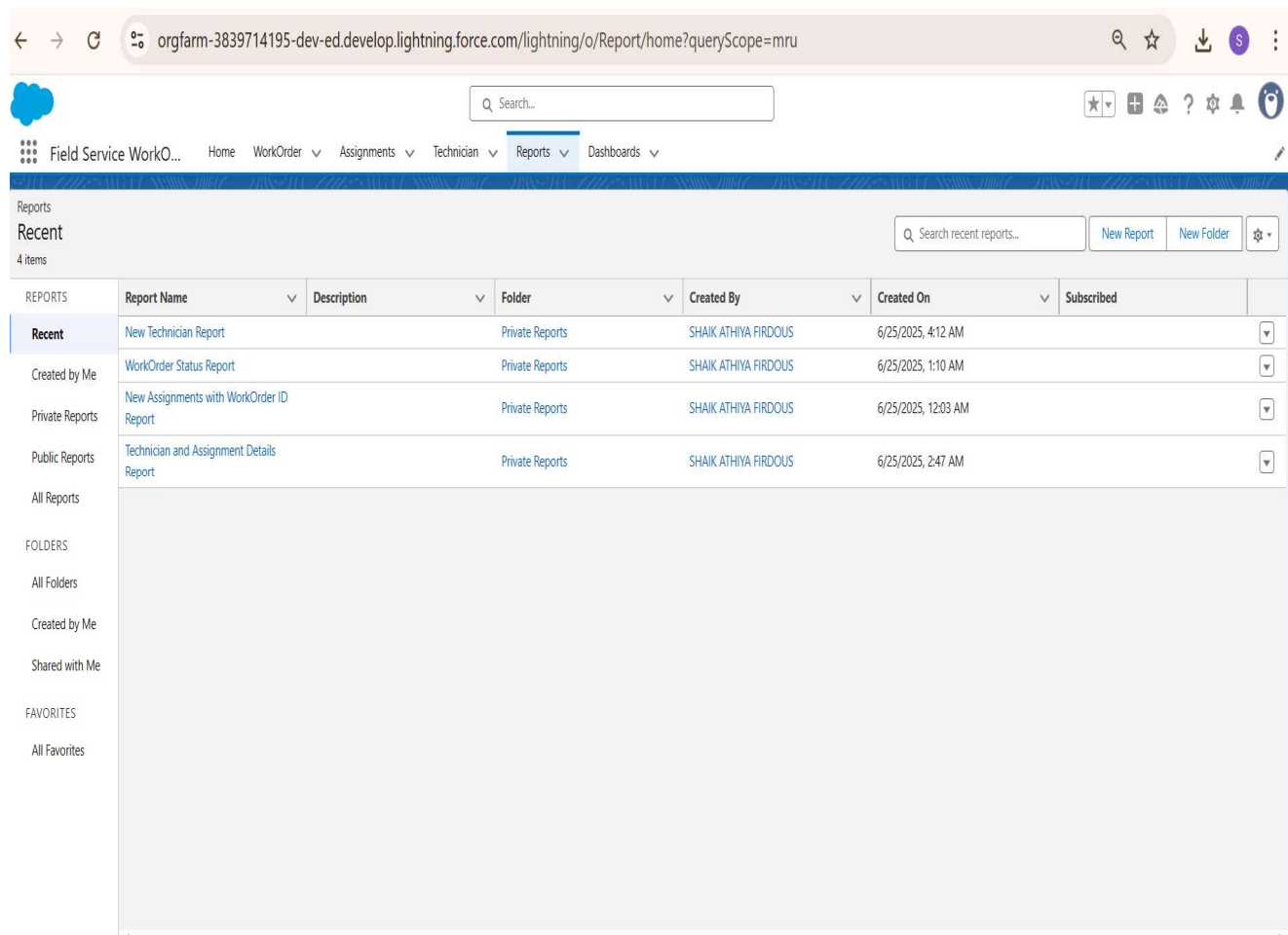
- Created a report with report type: “WorkOrders Status Reports”.
- Created a report with report type: “Technician and Assignment Details Reports”.

- **Dashboards**

- Create dashboard showing the technician report in a table chart
- Create Dashboard which shows the details of completed workorder status in a vertical bar graph.

OUTPUT SCREENSHOTS:-

- **Reports**



The screenshot displays the Salesforce Reports interface. The browser address bar shows the URL: `orgfarm-3839714195-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrui`. The page header includes a search bar and navigation tabs: Home, WorkOrder, Assignments, Technician, Reports (selected), and Dashboards. The main content area is titled "Reports" and "Recent", showing a list of 4 items. The table below lists the reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Technician Report		Private Reports	SHAIK ATHIYA FIRDOUS	6/25/2025, 4:12 AM	
Created by Me	WorkOrder Status Report		Private Reports	SHAIK ATHIYA FIRDOUS	6/25/2025, 1:10 AM	
Private Reports	New Assignments with WorkOrder ID Report		Private Reports	SHAIK ATHIYA FIRDOUS	6/25/2025, 12:03 AM	
Public Reports	Technician and Assignment Details Report		Private Reports	SHAIK ATHIYA FIRDOUS	6/25/2025, 2:47 AM	
All Reports						

The left sidebar contains navigation options: FOLDERS (All Folders, Created by Me, Shared with Me) and FAVORITES (All Favorites).

➤ WorkOrders Status Reports

Field Service WorkO... Home WorkOrder Assignments Technician Reports Dashboards

Search...

Report: WorkOrder
WorkOrder Status Report

Enable Field Editing Add Chart Edit

Total Records
3

Record Count	Service Type	WorkOrder: ID	WorkOrder: WorkOrder ID	Description	Email	Location	Priority	RecordCount	Status	WorkOrder: Owner Name	WorkOrder: Owner Alias	WorkOrd
5 (3)	Hardware repair (1)	a01gK00000B4DwQ	W-001	-	athiyanoor75@gmail.com	Nasik	High	1	Value1	SHAIK ATHIYA FIRDOUS	ath	-
	Subtotal											
	Troubleshoot/Debugging (1)	a01gK00000B4PRJ	W-002	-	nooru@gmail.com	Warangal	High	0.5	Value1	SHAIK ATHIYA FIRDOUS	ath	-
	Subtotal											
	Lanc-Management (1)	a01gK00000B8uQG	W-003	-	nooru@gmail.com	Nanded	High	1	Value1	SHAIK ATHIYA FIRDOUS	ath	-
	Subtotal											
	Subtotal											
	Total (3)											

Row Counts Detail Rows Subtotals Grand Total

➤ Technician and Assignment Details Reports”.

Field Service WorkO... Home WorkOrder Assignments Technician Reports Dashboards

Search...

Report: Technician
New Technician Report

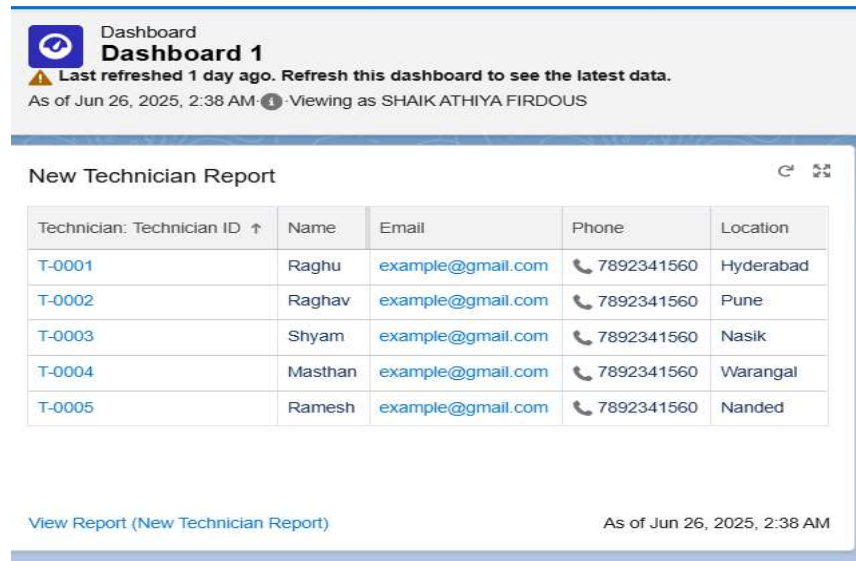
Enable Field Editing Add Chart Edit

Total Records
6

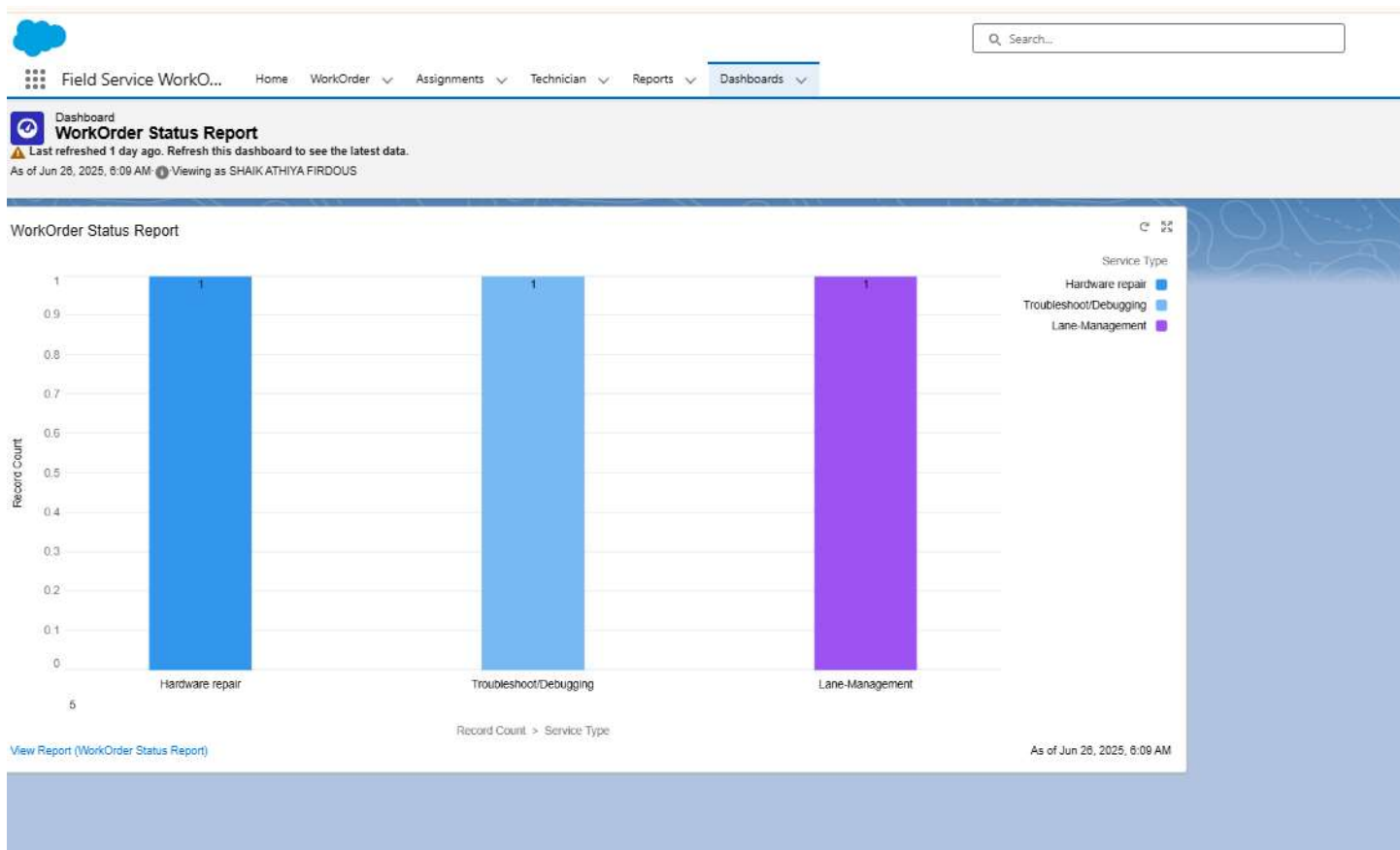
Technician: Technician ID	Name	Email	Availability	Phone	Location
1 T-0001	Raghu	example@gmail.com	Available	7892341560	Hyderabad
2 T-0002	Raghav	example@gmail.com	Not Available	7892341560	Pune
3 T-0003	Shyam	example@gmail.com	Not Available	7892341560	Nasik
4 T-0004	Masthan	example@gmail.com	Available	7892341560	Warangal
5 T-0005	Ramesh	example@gmail.com	Available	7892341560	Nanded
6 123	raghu	raghu@gmail.com	Available	547890	Pune

- **Dashboards**

- Create dashboard showing the technician report in a table chart



- Create Dashboard which shows the details of completed workorder status in a vertical bar graph.



6.1 Final Review

- Conducted full system testing.
- Checked all object links, Profiles, Users, triggers, reports and dashboards.
- Confirmed the Field Service WorkOrder Optimization is fully functional and stable.

6.2 Dataset

Object	Sample Fields Used
WorkOrder	WorkOrderID: W-001, Email: athiyanoor75gmail.com, Servicetype: Hardware repair, Location: Nasik, Priority: High
Assignment	Technician ID:123, Name: Raghu, Phone:57894, Assignment:available
Technician	Technician ID:001, Name: Raghu, Phone:789264571, Skills: machine Installation