Field Service WorkOrder Optimization

**1.Project Overview**

**1.1 Project Name**

Field Service WorkOrder Optimization

**1.2 Project Description**

The Field Service WorkOrder Optimization project aimed to enhance efficiency of field service operations by implementing a comprehensive Salesforce system.The system integrates various custom objects and automation features to streamline the management of work orders,technicians,and assignments.

**1.3 Objectives**

● Optimization of Work Order Assignment

● Integration with Existing Systems

● User Experience Enhancement

● Reporting and Analytic

**1.4 Outcomes**

The project successfully met its objectives, leading to the following outcomes:

● Increased Efficiency

● Improved Technician Productivity

● Enhanced Data Accuracy

● Positive User Feedback

● Better Decision-Making

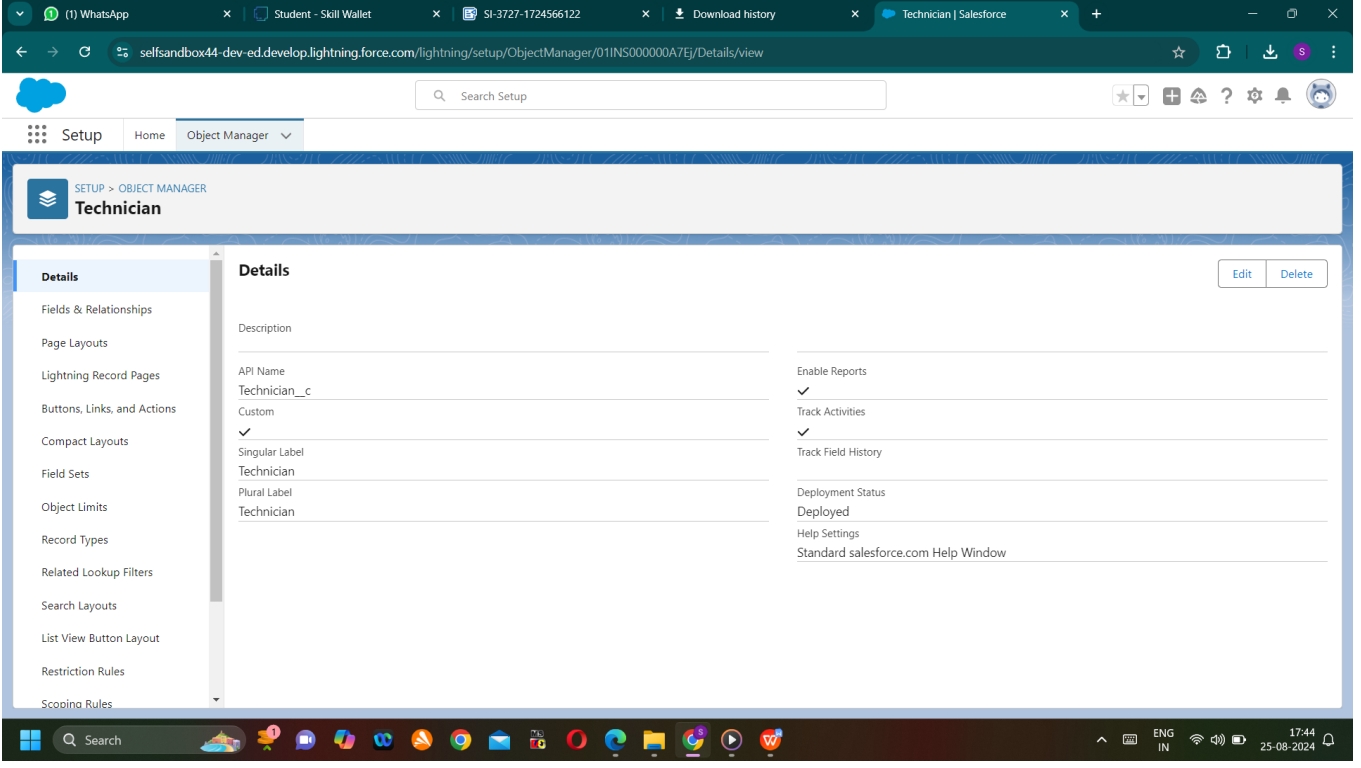
**2.Implementation Details**

**2.1 Custom Objects Created**

**1. Technician Object**

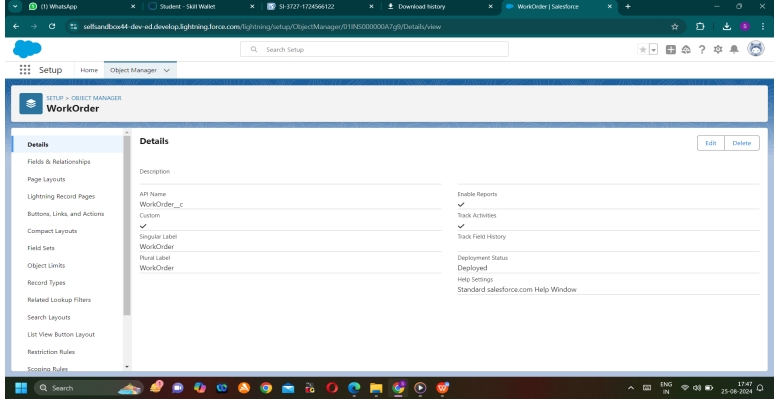
○ **Purpose:** To store detailed information about technicians.

○ **Data Imported**: Technician details from the **Technician.csv** file.



**2. WorkOrder Object**

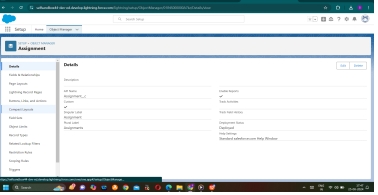
**○ Purpose:** To manage and track work orders assigned to field technicians.

**○ Fields:** Includes details such as Priority, Service Type, and Location. 

**3. Assignment Object**

**○ Purpose:** To manage the assignment of work orders to techinians

○ **Fields:** Includes Technician ID, Assignment Date, and Completion Date.



**2.2 Custom Fields and Relationships**

**1. Assignment Object**

**○ Lookup Field**: Created a Lookup field to associate with the WorkOrder object.

○ Formula Fields: Added formula fields to calculate dates and statuses based on related records.

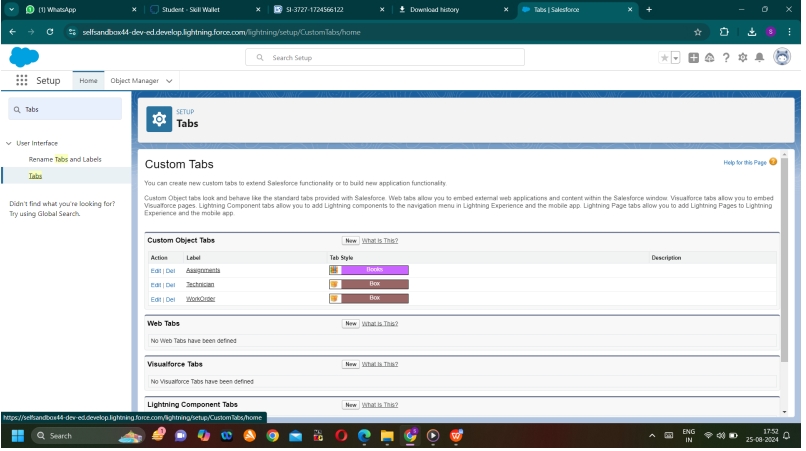
**2. WorkOrder Object**

**○ Picklist Values:** Added picklist values for fields like Priority and Service Type.

**○ Formula Fields:** Created formula fields to capture creation dates and status updates. **2.3 Tabs and Navigation**

● **Custom Tabs:** Created a tab for the Assignment object.

● **Navigation:** Added relevant items (Home, WorkOrder, Technician, Assignment, Reports, Dashboard) to the Lightning App.

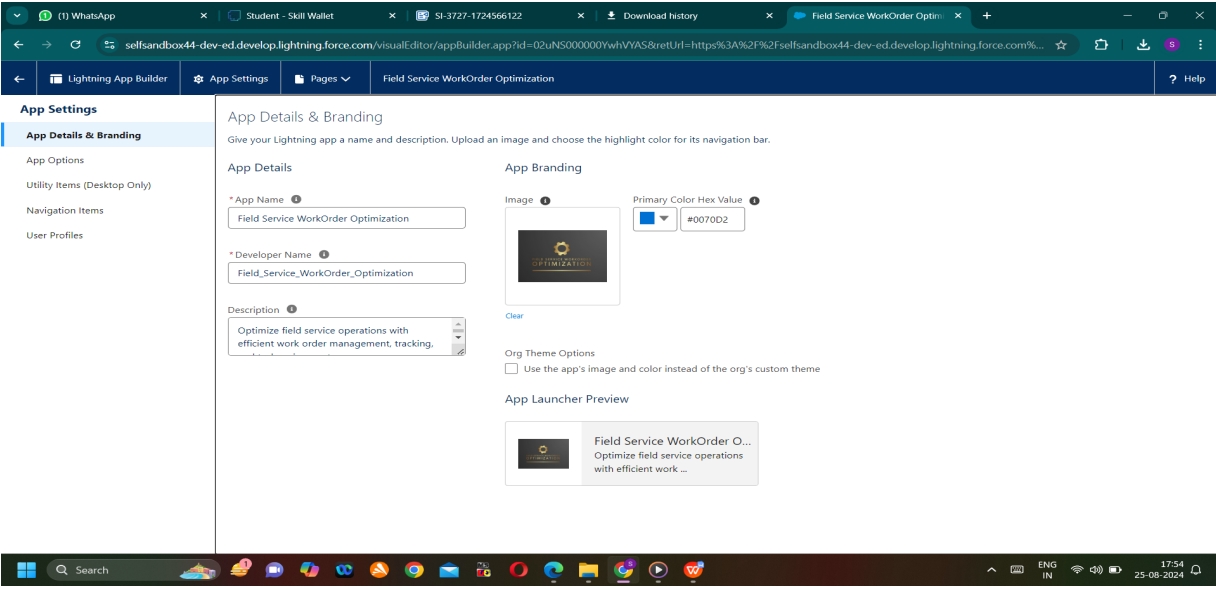


**2.4 Lightning App Creation**

● **App Name**: Field Service WorkOrder Optimization

● **Navigation Items:** Included Home, WorkOrder, Technician, Assignment, Reports, and Dashboard.

● **User Profiles:** Assigned access to the System Administrator profile for visibility.



**3.Fields & Relationship**

● Creating Lookup Field In Assignment Object(WorkOrder, Technician ID) And Formula field(Assignment Date,Completion Date).

● Manage Your Picklist Values(Location, Priority,Service Type) in WorkOrder Object

● Creating Formula Field In WorkOrder Object(Date)

**4. User Profiles and Permissions**

**4.1 Technician Profile**

**● Permissions:** Provided Read-Only access to Technician, WorkOrder, and Assignment objects.

**● Field-Level Security:** Enabled visibility for critical fields such as Status in the WorkOrder object.

**4.2 User Creation**

**● User Details:** Created a user with the profile of Technician, including personal details and Salesforce Platform license.

**5.Apex Trigger**

Use Salesforce Developer Console or Salesforce CLI to deploy the following Apex classes and triggers:

- Apex Classes:

•WorkOrderClass

•AssigningEmailClass

•CompletionMail Class

•RecordDeletion Class

•Schedule Class

- Apex Triggers:

•WorkOrderTrigger,

•Assignment Trigger

**6.Reports & Dashboards**

Salesforce Reports and Dashboards are powerful tools that empower users to visualize and analyze data within he Salesforce platform. They play a crucial role in providing insights, monitoring performance, and making informed business decisions.

**Create Reports**

● Create a report with report type: “Assignment with WorkOrder ID".

● Create a report with report type: “WorkOrders Status Reports”.

● Create a report with report type: “Technician and Assignment Details Reports”.

**Create Dashboards**

**7. Project Summary** The Field Service WorkOrder Optimization project successfully established a Salesforce system tailored for efficient field service management. By integrating custom objects, automating processes, and providing valuable insights, the project has enhanced operational efficiency and customer satisfaction