

Agile Planning Logic – Field Service WorkOrder Optimization

Epic 1: Salesforce Data Model Setup

Goal: Set up custom objects, fields, and relationships in Salesforce

Sprint 1 (5 Days)

User Story	Story Points
Create custom objects: Technician, WorkOrder, Assignment	3
Add fields (Text, Email, Lookup, Auto-Number, Formula, Picklist) to all objects	3
Create relationships (Lookup, Master-Detail) among objects	2
Create custom tabs for each object	1

Epic 2: UX, Record Types & Permissions

Sprint 2 (5 Days)

User Story	Story Points
Create Page Layouts for Assignment and WorkOrder	2
Create Record Types for WorkOrder status	2
Set up permission sets and profiles (e.g. Technician)	3
Assign Record Type Access in Permission Sets	1
Create roles and users (e.g. Elina Gilbert, Kol Mikaelson)	2

Epic 3: Backend Logic (Apex Classes & Triggers)

Sprint 3 (5 Days)

User Story	Story Points
Create Apex Handler class for WorkOrder assignments	3
Write Trigger to auto-assign Technician to WorkOrder	2
Create Validation Rules for fields like Email, Status	3
Set up Field Dependencies (e.g. Priority → Completion Time)	2

Epic 4: Reports, Dashboards & Automation

Sprint 4 (5 Days)

User Story	Story Points
Create reports: "Technician Assignments", "WorkOrder Status Summary"	3
Design dashboards: "WorkOrder Optimization", "Resolved vs Unresolved"	3
Create Record-Triggered Flow to notify technician via email	4
Add dynamic text templates and rich content to Flow	2

Summary

Sprint	Story Points	Goal
Sprint 1	9	Core Object and Data Model Setup
Sprint 2	10	UX, Record Types, and Security
Sprint 3	10	Backend Logic & Apex Automation
Sprint 4	12	Reporting, Dashboards & Flow Automation

Velocity Calculation

Total Story Points: 41

Number of Sprints: 4

Velocity = $41 / 4 = 10.25$ Story Points per Sprint