

# 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:

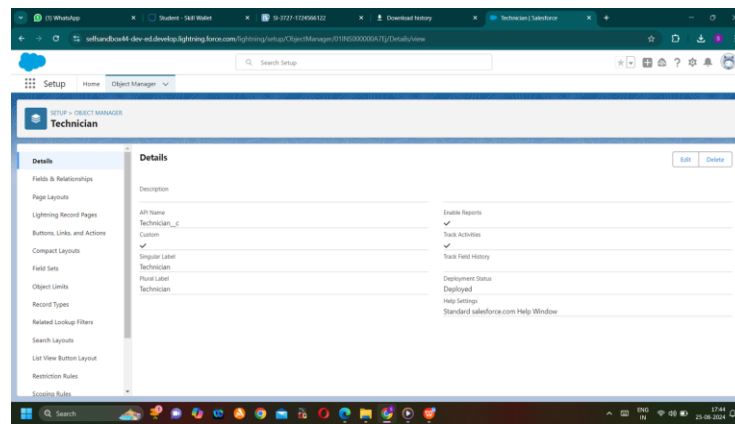
- Increased Efficiency
- Improved Technician Productivity
- Enhanced Data Accuracy
- Positive User Feedback
- Better Decision-Making

## 2. Implementation Details

### 2.1 Custom Objects Created

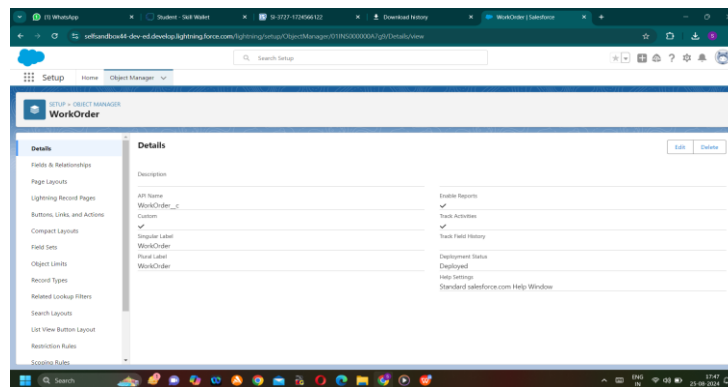
1. Technician Object

- Purpose: To store detailed information about technicians.
- Data Imported: Technician details from the Technician.csv file.



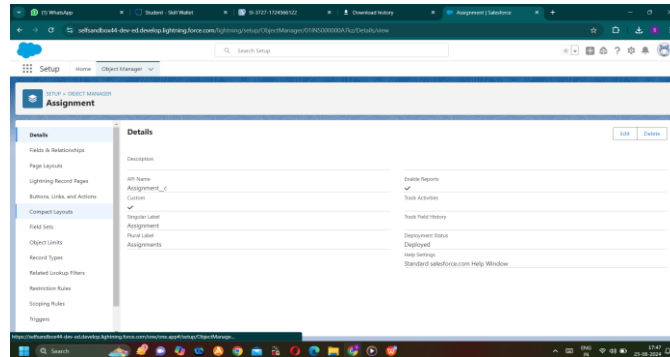
## 2. WorkOrder Object

- 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 technicians.
- Fields: Includes Technician ID, Assignment Date, and Completion Date.



## 2.2 Custom Fields and Relationships

### 1. Assignment Object

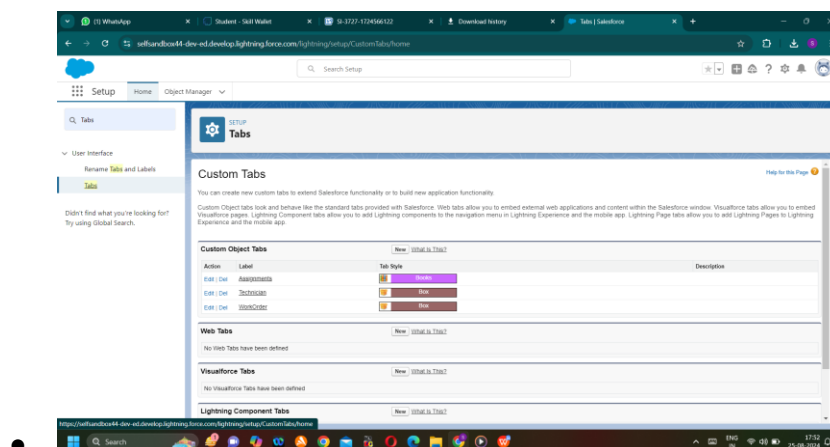
- Lookup Field: Created a Lookup field to associate with the WorkOrder object.
- Formula Fields: Added formula fields to calculate dates and statuses based on related records.

### 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.

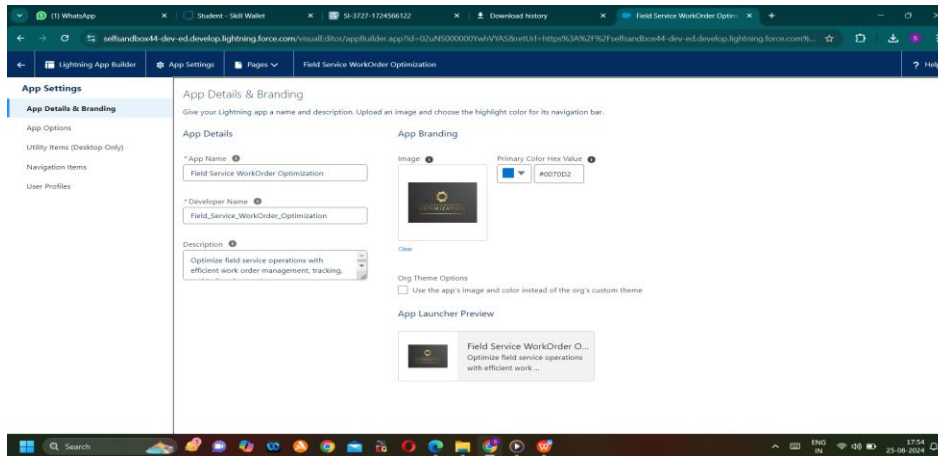
## 2.3 Tabs and Navigation

- 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)
- Creating Remaining Fields For The Respective Objects

## 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:

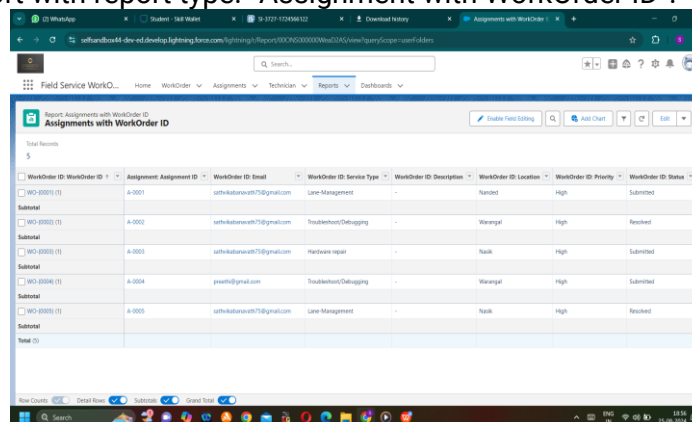
- Apex Classes:
  - WorkOrderClass,
  - AssigningEmailClass
  - CompletionMail Class
  - RecordDeletion Class
  - Schedule Class
- Apex Triggers:
  - WorkOrderTrigger,
  - *Assignment Trigger*

## ● 6.Reports & Dashboards

Salesforce Reports and Dashboards are powerful tools that empower users to visualize and analyze data within the 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".



WorkOrder ID	Assignment ID	WorkOrder ID Email	WorkOrder ID Service Type	WorkOrder ID Description	WorkOrder ID Location	WorkOrder ID Priority	WorkOrder ID Status
WFO-0001 (1)	A-0001	sohikabansari70@gmail.com	Lane Management	-	Noida	High	Submitted
WFO-0002 (1)	A-0002	sohikabansari70@gmail.com	Troubleshooting	-	Warangal	High	Required
WFO-0003 (1)	A-0003	sohikabansari70@gmail.com	Hardware repair	-	Noida	High	Submitted
WFO-0004 (1)	A-0004	gresh@gmail.com	Troubleshooting	-	Warangal	High	Submitted
WFO-0005 (1)	A-0005	sohikabansari70@gmail.com	Lane Management	-	Noida	High	Required
Total (1)							

- Create a report with report type: "WorkOrders Status Reports".

**WorkOrders Status Reports Report**

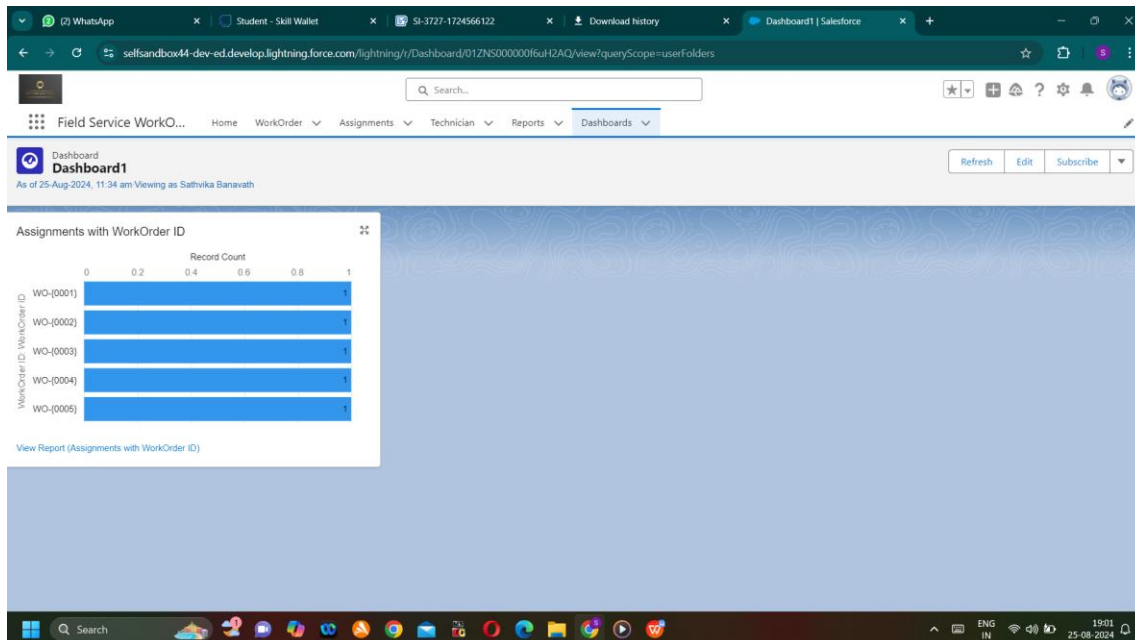
Total Records: 5

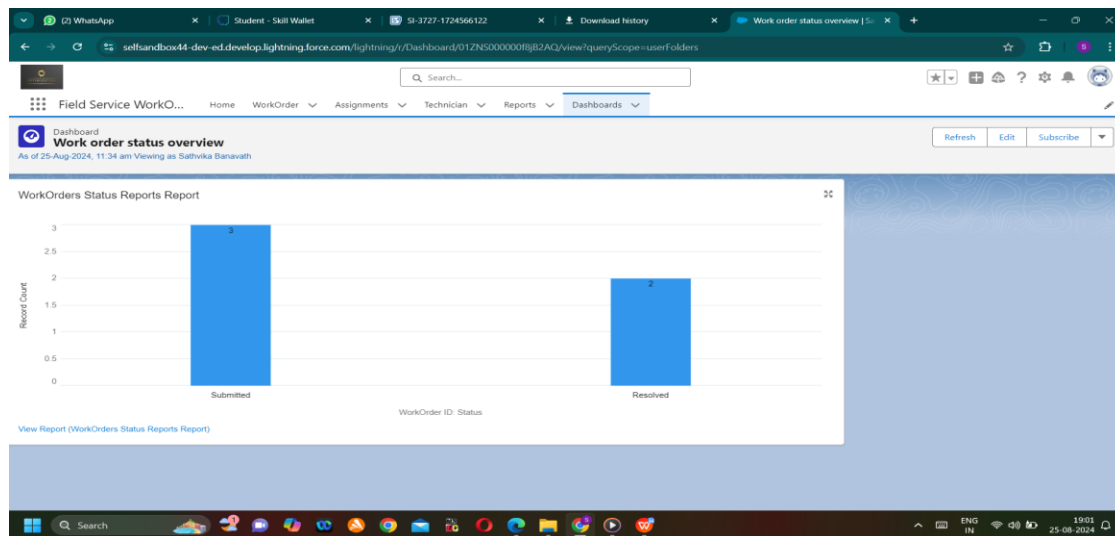
WorkOrder ID: Status	Assignment ID	Technician ID: Technician ID	WorkOrder ID: WorkOrder ID	WorkOrder ID: Email	WorkOrder ID: Service Type	WorkOrder ID: Description	WorkOrder ID: Location	Work
Submitted (3)	A-0004	T-0004	WO-0006	preeth@gmail.com	Troubleshoot/Debugging	-	Warangal	High
	A-0003	T-0003	WO-0003	sathvikabanavath75@gmail.com	Hardware repair	-	Nasik	High
	A-0001	T-0001	WO-0001	sathvikabanavath75@gmail.com	Lane Management	-	Nanded	High
<b>Subtotal</b>								
Resolved (2)	A-0005	T-0005	WO-0005	sathvikabanavath75@gmail.com	Lane Management	-	Nasik	High
	A-0002	T-0002	WO-0002	sathvikabanavath75@gmail.com	Troubleshoot/Debugging	-	Warangal	High
<b>Subtotal</b>								
<b>Total (5)</b>								

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

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## 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.