

KALLAM HARANADHAREDDY INSTITUTE OF TECHNOLOGY

(AUTONOMOUS)

DEPARTMENT OF INFORMATION TECHNOLOGY

TITLE: FIELD SERVICE WORK ORDER OPTIMIZATION

UNDER THE ESTEEMED GUIDENCE OF

SALESFORCE AI DEVELOPER

SUBMITTED BY

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Project Overview

The Field Service Work Order Optimization System revolutionizes operations for companies specializing in installations and repairs. By utilizing a comprehensive database, the system adeptly matches work orders with the most suitable technicians, based on their location, availability, and skill sets. This sophisticated algorithm ensures tasks are assigned efficiently, minimizing downtime and maximizing productivity. Automated communication features keep technicians well-informed with real-time notifications about assignments, changes, and updates. Meanwhile, analytics offer valuable insights into technician performance and customer satisfaction, driving continuous improvement. Ultimately, this solution enhances operational efficiency, reduces costs, and significantly boosts customer satisfaction in the dynamic field of service operations.

Objectives

1. Business Goals:

Salesforce helps organizations streamline operations, improve customer relationships, and drive business growth. Here are key business goals that can be achieved using Salesforce.

1. Increase Sales & Revenue:

Lead & Opportunity Management – Track and convert leads efficiently.

Sales Automation – Reduce manual tasks and improve productivity.

AI-Driven Forecasting – Predict sales trends and optimize strategies.

2. Enhance Customer Satisfaction & Retention:

Omni channel Customer Support – Provide seamless service across email, chat, phone, and social media.

Personalized Customer Journeys – Use AI-driven insights to tailor interactions.

3. Improve Marketing Effectiveness:

Targeted Campaigns – Segment audiences for personalized marketing.

Marketing Automation – Email marketing, social media, & lead nurturing.

Performance Analytics – Measure and optimize campaign success.

4. Streamline Business Operations:

Process Automation – Reduce manual workflows with Salesforce Flow & Process Builder.

Data Integration – Connect Salesforce with other business systems (ERP, HR, Finance).

Custom App Development – Build tailored solutions using the Lightning Platform.

5. Foster Data-Driven Decision Making:

Real-Time Dashboards & Reports – Gain insights into business performance.

AI-Powered Analytics – Use Einstein AI for predictive insights and trends.

Centralized Data Management – Ensure data consistency and accuracy.

2. Business Outcomes:

Implementing Salesforce drives measurable business outcomes across sales, customer service, marketing, and overall operations. Here are the key business outcomes organizations.

1.Increased Sales & Revenue:

Higher conversion rates through effective lead and opportunity management.

Shorter sales cycles due to automation and AI-driven forecasting.

Improved upselling and cross-selling with customer insights and analytics.

2. Enhanced Customer Satisfaction & Retention:

Faster response times with AI-driven case management and self-service portals.

Personalized customer experiences with Einstein AI and Marketing Cloud.

Stronger relationships through 360-degree customer visibility.

3. Improved Operational Efficiency:

Automation of repetitive tasks, reducing manual workload and errors.

Seamless data integration across departments for better collaboration.

Real-time analytics for proactive decision-making.

4. Optimized Marketing Performance:

Higher engagement rates from targeted campaigns and personalization.

Better ROI tracking with real-time marketing analytics.

Increased lead generation through automated and AI-enhanced marketing strategies.

5. Stronger Security & Compliance:

Reduced risk of data breaches with role-based access control and encryption.

Compliance with industry regulations like GDPR, HIPAA, and ISO.

Enhanced security with Multi-Factor Authentication (MFA).

Salesforce Key Features And Concepts Utilized

Key Features Of Salesforce:

1. Customer Relationship Management (CRM)
2. Sales Automation (Sales Cloud)
3. Customer Service & Support (Service Cloud)
4. Marketing Automation (Marketing Cloud)
5. Customization & App Development

Key Concepts Utilized in Salesforce:

1. Data Model & Structure
2. Security & Access Control
3. Integration & Connectivity
4. Automation & Process Management
5. Customization & Development

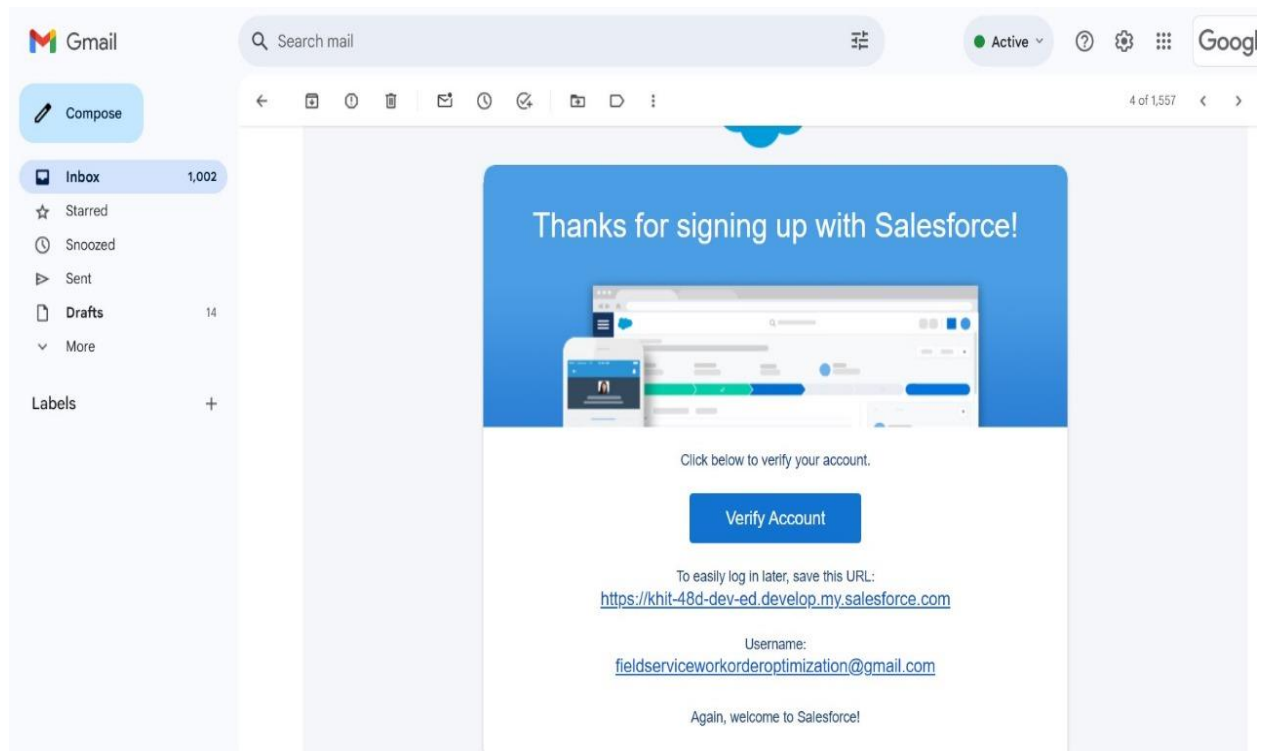
Detailed Steps to Solution Design

Sales force:

Relating the Sales force Developer Edition org allows developers to experiment, innovate, and build customized solutions within a controlled environment. With access to Sales force's powerful development tools and features, developers can prototype, test, and refine their applications, empowering them to deliver robust and tailored solutions to meet unique business requirements.

Account Activation:

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password
4. Then you will redirect to your sales force setup page.

Q Search Setup

Setup Home Object Manager

Q Quick Find

SETUP Home

Create

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Join the Trailblazer Community

Get help, learn and collaborate with fellow customers.

Join Now

Most Recently Used

10 items

NAME	TYPE	OBJECT
ScheduleClass	Apex Class	
RecordDeletions	Apex Class	
WorkOrderTrigger	Apex Trigger	WorkOrder.csv
PowerOfTwo	Apex Class	

Object: To store the data as per business requirement.

Create a custom object from a spreadsheet


Select a spreadsheet

Select a source for your new object data.


Upload

or Drop File Here

Upload .xlsx or .csv



Google Sheet



Office 365 or Drive

Create Technician Object:

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

Worksheet Details

Field Label Source

Enter manually

Detect from row

* Field Labels Row

1

Import 5 rows of Data?

No, skip import

Yes, import data

Record Name Field

Let Salesforce Create a Default F

Fields 7 of 7 to import

Hide mapped fields

IMPORT FILE FIELD NAME

SALESFORCE FIELD NAME

SALESFORCE FIELD TYPE

ADD TO LAYOUTS

FIELD PREVIEW

✓ Technician ID	✕ Technician ID	Text	✓	T-0001
✓ Name	✕ Name	Text	✓	Raghu
✓ Phone	✕ Phone	Integer	✓	7892341560
✓ Email	✕ Email	Email	✓	example@gmail.com
✓ Location	✕ Location	Text	✓	Hyderabad
✓ Availability	✕ Availability	Text	✓	Available

Back

Next

Create Work Order Object:

The screenshot shows the 'Define object and fields' step of the Salesforce Object Creator wizard. The page title is 'Create a custom object from a spreadsheet'. Below this, it says 'Define object and fields' and 'Choose the data source, map fields and their types, and import field data.'.

Worksheet Details

- Field Label Source: ☐ Enter manually, ☒ Detect from row
- * Field Labels Row: 1
- Import 2 rows of Data?: ☐ No, skip import, ☒ Yes, import data
- Record Name Field: Let Salesforce Create a Default Field

Fields 7 of 7 to import ☐ Hide mapped fields

IMPORT FILE FIELD NAME	Salesforce Field Name	Salesforce Field Type	ADD TO LAYOUTS	FIELD PREVIEW
✓ Email	Email	Email	<input checked="" type="checkbox"/>	example1@workorder.com
✓ Service Type	Service Type	Text	<input checked="" type="checkbox"/>	Maintenance
⚠ Description	Description	Select Field Type...	<input checked="" type="checkbox"/>	
✓ Location	Location	Text	<input checked="" type="checkbox"/>	Pune
✓ Priority	Priority	Text	<input checked="" type="checkbox"/>	Low
✓ Status	Status	Text	<input checked="" type="checkbox"/>	Submitted

Navigation: Back, Progress bar (7/7), Next

Create Assignment Object:

To create an object:

1. From the setup page --> Click on Object Manager --> Click on Create Click on Custom Object.

1. Enter the label name --> Assignment

2. Plural label name --> Assignments

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label

Assignment

Example: Account

Plural Label

Assignments

Example: Accounts

Starts with vowel sound

☐

The Object Name is used when referencing the object via the API.

Object Name

Assignment

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

-None-

3. Enter Record Name Label and Format

Record Name --> Assignment ID

Data Type --> Auto Number

Display Format --> A-{0000}

Starting Number --> 1

4. Click on Allow reports,

Allow search --> Save.

Tabs:

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Creating a Custom Tab:

The screenshot shows the 'New Custom Object Tab' setup page in Salesforce. The page has a blue header with a 'SETUP Tabs' icon. The main title is 'New Custom Object Tab' with a 'Help for this Page' link. Below the title is a progress bar indicating 'Step 1 of 3: Enter the Details'. The instructions state: 'Choose the custom object for this new custom tab. Fill in other details.' The form fields include: 'Object' (a dropdown menu with 'Assignment' selected), 'Tab Style' (a button labeled 'Books' with a magnifying glass icon), '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' (a dropdown menu with '--None--' selected), and 'Enter a short description.' (a text area labeled 'Description'). A red error message 'Required Information' is visible on the right side of the form.

The Lightning App:

Well done you have reached close to your organizational requirement by creating the objects to store the organization's data. Making a database for an organization is just not enough to reach out the requirements, the task is how the users at the organization can access the objects you have created for them.

Create a Lightning App:

To create a lightning app page:

1. Go to setup page --> search "app manager" in quick find --> select "app manager" --> click on New lightning App.

New Lightning App

*App Name ⓘ
Field Service WorkOrder Optimization

*Developer Name ⓘ
Field_Service_WorkOrder_Optimization

Description ⓘ
Enter a description...

Image ⓘ
Upload

Primary Color Hex
Value ⓘ
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

FS Field Service WorkOrder O...

Next

2. Fill the app name in app details and branding as follow

App Name: Field Service Work Order Optimization

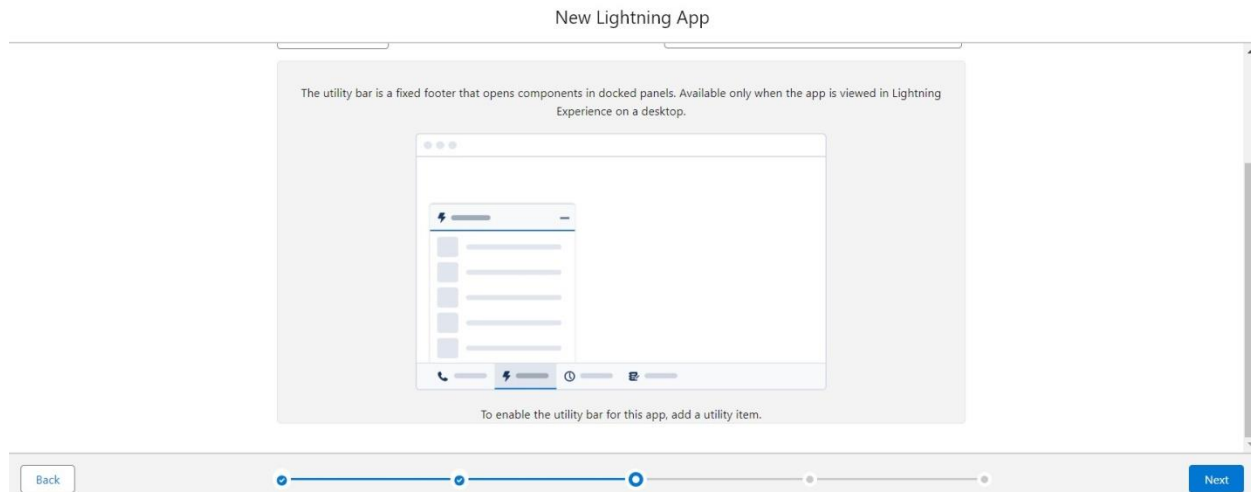
Developer Name: this will auto populated

Description: Give a meaningful description

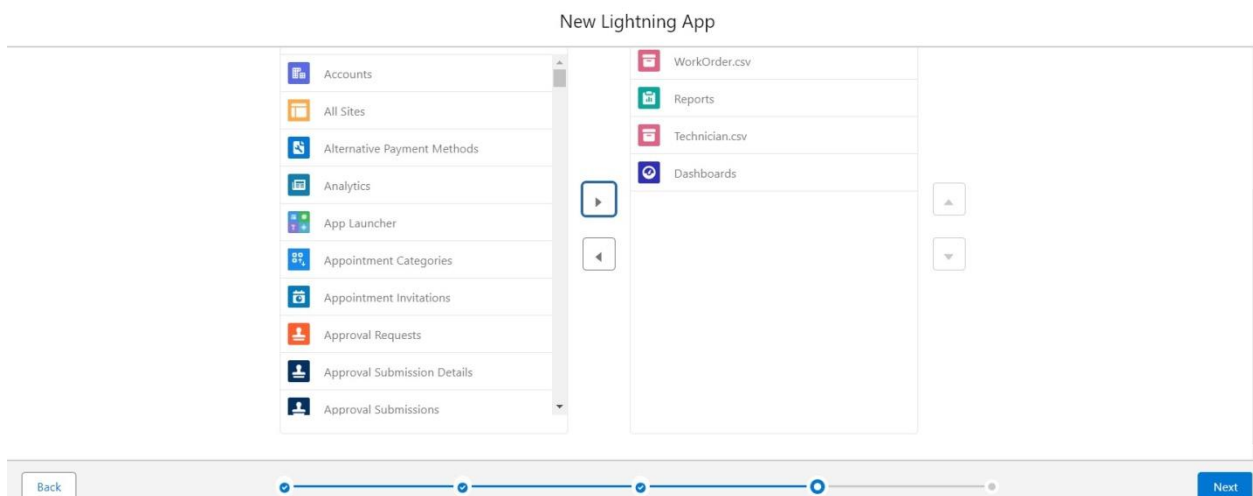
Image: optional (if you want to give any image you can otherwise not mandatory)

Primary color hex value: keep this default.

3. Then click Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.



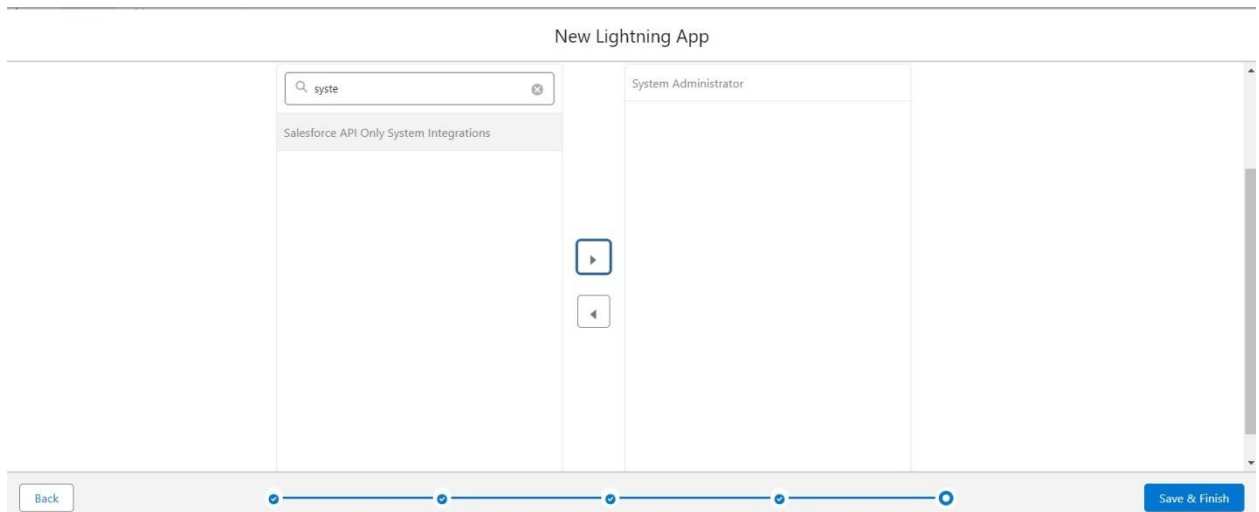
4. To Add Navigation Items:



Search the items in the search bar (Home, Work Order, Technician, Assignment, Reports, Dashboard) from the search bar and move it using the arrow button.

Note: select asset the custom object which we have created in the page.

5. To Add User Profiles



Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

Fields & Relationship:

Now it's time for you to think out of the box for your organization. You have successfully created the database objects for the organization but now all eyes turn on you as you have to define what sort of information the objects store which you have created. As a life saver of your organization you come up with the idea of creating fields to store different types of data.

Edit Assignment Custom Field
WorkOrder ID

Have feedback on lookup filters? Comment on IdeaExchange Help for this Page

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

Field Information ! Required information

Field Label	<input type="text" value="WorkOrder ID"/>	Data Type	Lookup
Field Name	<input type="text" value="WorkOrder_ID"/>		
Description	<div></div>		
Help Text	<div></div>		
Data Owner	<input type="text" value="User"/>		
Field Usage	<input type="text" value="--None--"/>		
Data Sensitivity Level	<input type="text" value="--None--"/>		
Compliance Categorization	<div> <div>Available</div> <div> <div>PII</div> <div>HIPAA</div> <div>GDPR</div> <div>PCI</div> </div> <div>Chosen</div> </div>		

Creating Lookup Field in Assignment Object:

To create fields in an object:

1. Go to setup --> click on Object Manager --> type object name (Assignment) in quick find bar--> click on the object.

Setup Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
WorkOrder.csv

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Location	Object Name	WorkOrder.csv
Field Name	Location	Data Type	Picklist
API Name	Location__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Sharon.pushpa.Mall		03/03/2025, 12:42 pm
Modified By	Sharon.pushpa.Mall		03/03/2025, 12:42 pm

General Options

Required ☐

Default Value

Picklist Options

Restrict picklist to the values defined in the value set ☒

Controlling Field [New](#)

Picklist Values Used

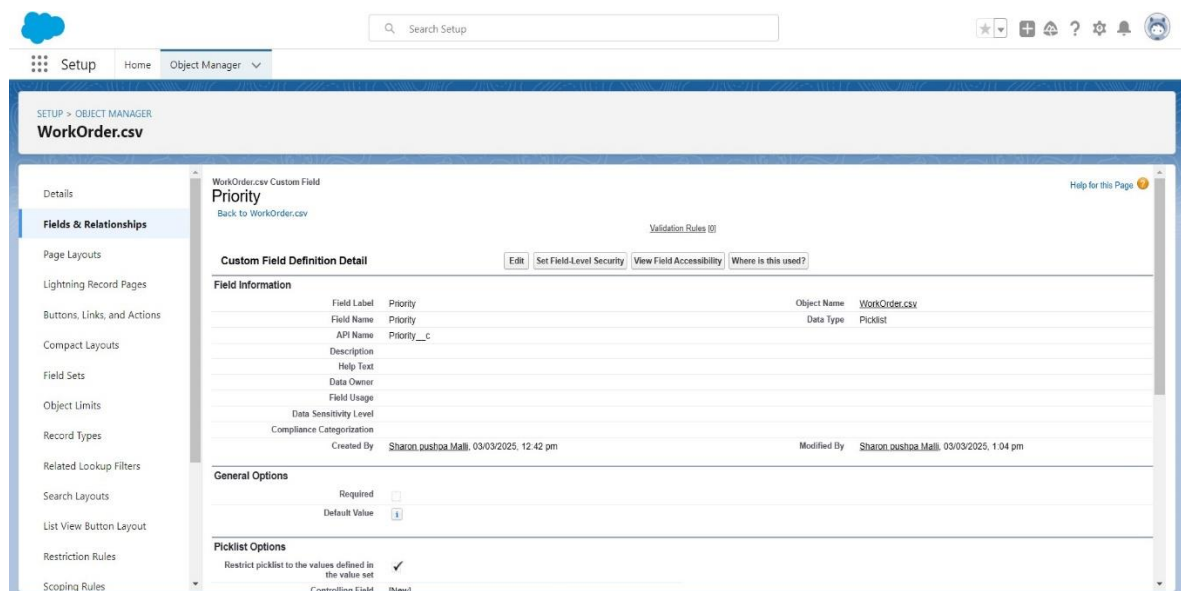
Active and inactive picklist values 4 (1,000 max)

2. Now click on “Fields & Relationships” --> New
3. Select Data type as “Lookup”

4. Click on Next
5. For field label related to: select “Work Order” object and click Next
6. Give Field Label as “Work Order ID” and click Next
7. Next --> Next --> Save & New

Manage your picklist values:

1. The setup page go to object manager
2. Search and Select Work Order object
3. Go to fields & relationship, select Location field, scroll down to values and click “New”.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The main navigation menu on the left lists various setup areas, with 'Fields & Relationships' selected. The main content area displays the 'WorkOrder.csv' object page. The 'Fields & Relationships' section is active, showing the 'Priority' custom field. The 'Custom Field Definition Detail' section includes tabs for 'Field Information', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' tab is selected, showing details for the 'Priority' field, including its label, name, API name, and data type. The 'General Options' section shows the 'Required' checkbox is unchecked and the 'Default Value' is set to '1'. The 'Picklist Options' section shows the 'Restrict picklist to the values defined in the value set' checkbox is checked.

4. Add the below values.
5. Click Save.

Creating Formula Field in Work Order Object:

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Formula” and click Next.
3. Give Field Label and Field Name as “Date” and select formula.

The screenshot shows the Salesforce Setup interface for the WorkOrder.csv object. The 'Service Type' field is being defined. The 'Field Information' section shows the field label as 'Service Type', field name as 'Service_Type', and API name as 'Service_Type__c'. The 'General Options' section shows the field is required and has a default value of 'X'. The 'Picklist Options' section shows the field is restricted to values defined in the picklist.

Field Information	Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Created On	Modified By	Modified On
	Service Type	Service_Type	Service_Type__c							Sharon.oushba.Mall	05/03/2025, 12:42 pm	Sharon.oushba.Mall	05/03/2025, 12:42 pm

General Options	Required	Default Value
	<input checked="" type="checkbox"/>	X

Picklist Options	Restrict picklist to the values defined in the value set
	<input checked="" type="checkbox"/>

4. Under Advanced Formula write down the formula and click “Check Syntax”
formula: Created date

The screenshot shows the Salesforce Setup interface for the WorkOrder.csv object. The 'Date' field is being defined. The 'Field Information' section shows the field label as 'Date', field name as 'Date', and API name as 'Date__c'. The 'Formula Options' section shows the field is a formula field with the formula 'CreatedDate'.

Field Information	Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Created On	Modified By	Modified On
	Date	Date	Date__c							Sharon.oushba.Mall	04/03/2025, 2:24 pm	Sharon.oushba.Mall	04/03/2025, 2:24 pm

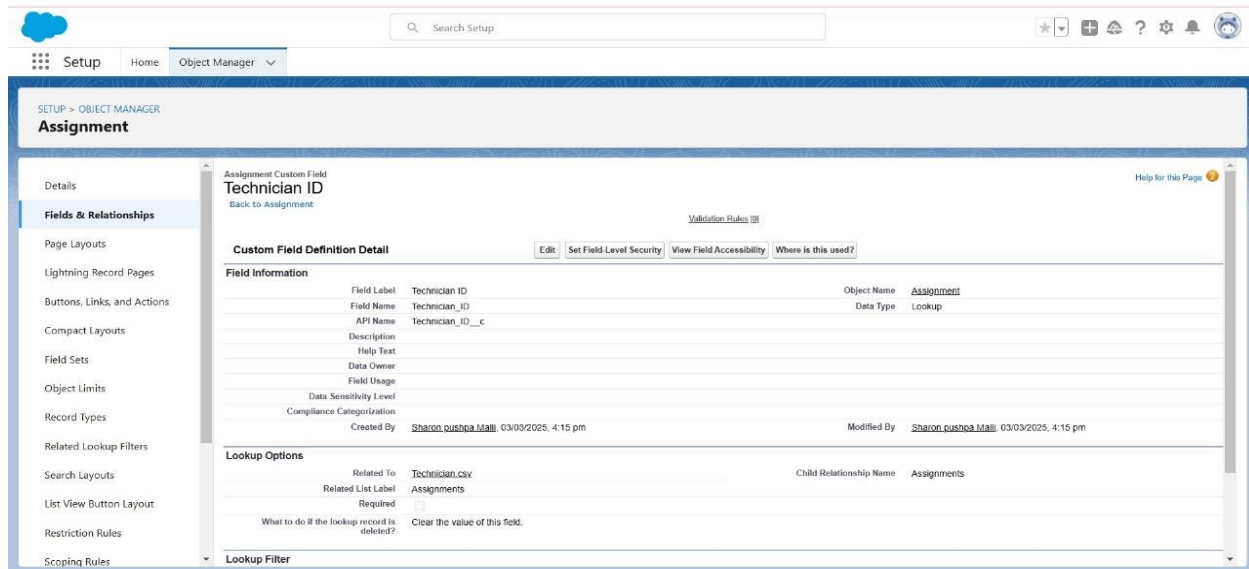
Formula Options	Data Type	Formula
	Date	CreatedDate

5. Next--> Next--> Save.

Creating Remaining fields for the respective objects:

Technician Id: Lookup (Technician)

Formula: return type: Date
(Work Order id Date)



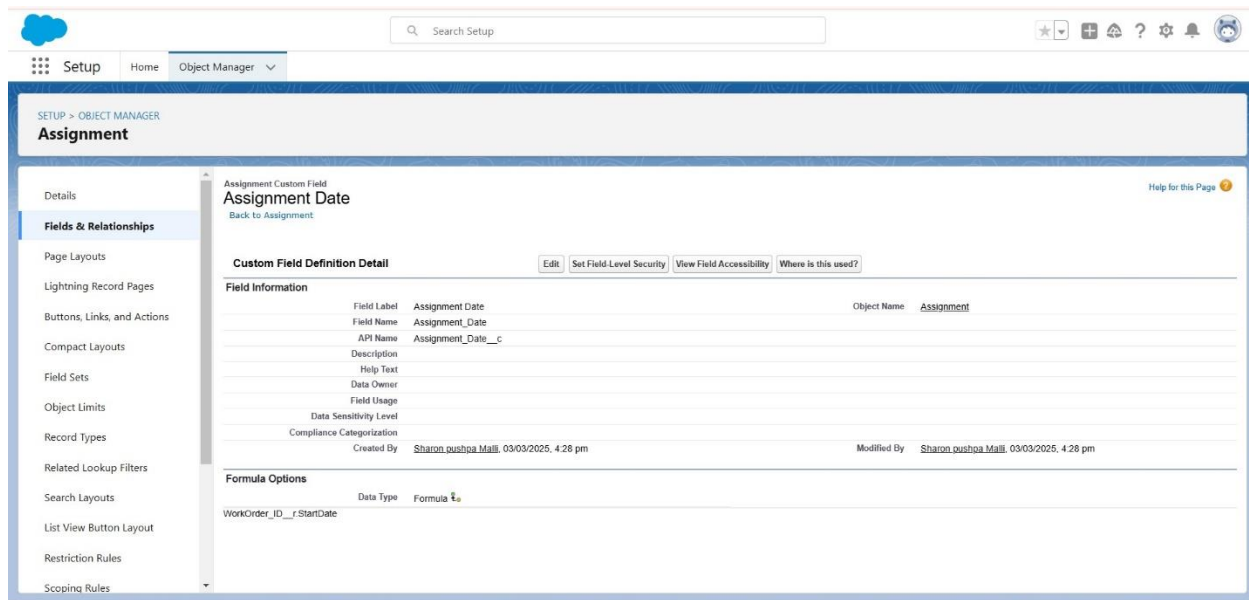
The screenshot shows the Salesforce Setup interface for the 'Assignment' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Assignment Custom Field Technician ID' and includes a 'Back to Assignment' link. Below this, there are tabs for 'Custom Field Definition Detail', 'Edit', 'Set Field Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing a table of field information. The table has columns for Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By, and Modified By. The field information is as follows:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Modified By
Technician ID	Technician_ID	Technician_ID__c							Sharon pushpa Mall	03/03/2025, 4:15 pm

Below the table, there are 'Lookup Options' and a 'Lookup Filter' section. The 'Lookup Options' section includes a 'Related To' dropdown set to 'Technician.csf', a 'Related List Label' dropdown set to 'Assignments', a 'Required' checkbox, and a 'What to do if the lookup record is deleted?' dropdown set to 'Clear the value of this field.'.

Assignment Date: Formula: return type: Date

IF (IS PICK VAL(Work Order ID r. Status c , 'Resolved')



The screenshot shows the Salesforce Setup interface for the 'Assignment' object. The left sidebar contains a navigation menu with options 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, and Scoping Rules. The main content area is titled 'Assignment Custom Field Assignment Date' and includes a 'Back to Assignment' link. Below this, there are tabs for 'Custom Field Definition Detail', 'Edit', 'Set Field Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing a table of field information. The table has columns for Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By, and Modified By. The field information is as follows:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Modified By
Assignment Date	Assignment_Date	Assignment_Date__c							Sharon pushpa Mall	03/03/2025, 4:28 pm

Below the table, there are 'Formula Options' and a 'Formula' section. The 'Formula Options' section includes a 'Data Type' dropdown set to 'Formula' and a 'Formula' text area containing the formula: `WorkOrder_ID__r.StartDate`.

Completion Date: Work Order ID r. Last Modified Date, NULL.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'Assignment' and shows the 'Completion Date' custom field definition. The 'Field Information' section includes details like Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'Formula Options' section shows the formula: IF(ISPICKVAL(WorkOrder_ID__r.Status, 'Resolved'), WorkOrder_ID__r.LastModifiedDate, NULL).

Field Information			
Field Label	Completion Date	Object Name	Assignment
Field Name	Completion_Date		
API Name	Completion_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Sharon pushpa Malli	Modified By	Sharon pushpa Malli
	03/03/2025, 4:32 pm		03/03/2025, 4:32 pm

Formula Options		
Data Type	Formula	
IF(ISPICKVAL(WorkOrder_ID__r.Status, 'Resolved'), WorkOrder_ID__r.LastModifiedDate, NULL)		

Profiles:

Profile defines what an user is able to do or see in the Salesforce Org.

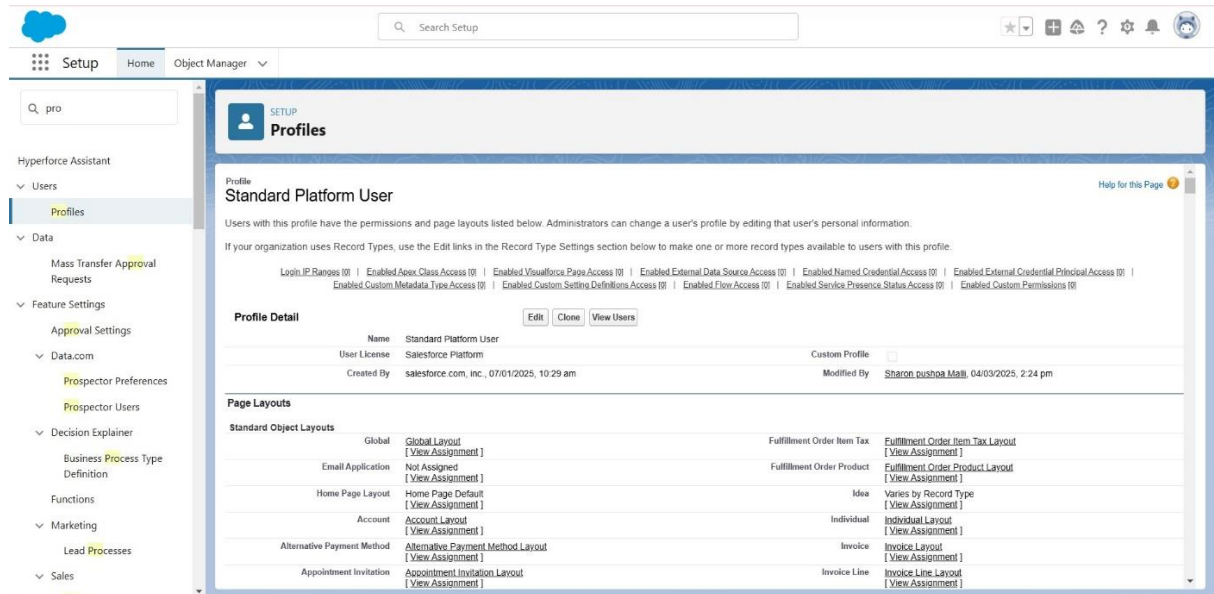
Technician Profile:

1. Go to setup --> type profiles in quick find box --> click on profiles --> click on new profile.
2. Select 'Standard Platform User' for existing profile and give 'Technician' for Profile Name and click on Save.

Clone Profiles:

1. While still on the profile page, then click Edit.
2. Scroll down to Custom Object Permissions and Give Read only access permissions for Technician, Work Order and Assignment objects and field
3. down and Click on Save.

4. Now from the profile detail page scroll down to custom field level security click on view next to Work Order object.
5. Click on Edit, enable the check box for the status field.



6. Click on Save.

Users:

Users are defined as the employees of your organization

Create User:

1. Go to setup --> type users in quick find box --> select users --> click New us
2. Fill in the fields
 1. First Name: Elina
 2. Last Name: Gilbert
 3. Alias: Give alias Name
 4. Email id: Give your Personal Email id
 5. Username: Username should be in this form: text@ text .text

6. Nick Name: Give a Nickname
7. User license: Salesforce Platform
8. Profiles: Technician.


The screenshot shows the Salesforce Setup interface. On the left, there is a navigation menu with 'Users' selected. The main area displays the 'User Edit' form for a user named Elina Gilbert. The form is divided into two sections: 'General Information' and 'Permissions'. The 'General Information' section includes fields for First Name (Elina), Last Name (Gilbert), Alias (oglib), Email (sharonmali17@gmail.com), Username (sharonpushpa@khit.com), Nickname (sharon), Title, Company, Department, and Division. The 'Permissions' section includes a dropdown for Role (<None Specified>), a dropdown for User License (Salesforce Platform), a dropdown for Profile (Standard Platform User), and checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Debug Mode.

Apex Trigger:

Create an Apex Class:

1. Go to Setup --> Click on the gear icon --> Select Developer Console.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. To create a new Apex Class follow the below steps:
Click on the file --> New --> Apex Class.
Give the Apex Class name as "Work Order Class".
4. Click ok.

5. Now write the code logic here

A screenshot of an IDE window showing the code for a class named WorkOrderClass. The code is written in Apex and includes a static method workOrder. The method takes a list of WorkOrderc__c objects as input. It initializes a map named maptotech with Integer keys and List<String> values. It then iterates through the input list, adding each object to the map based on its Service_Type__c and Location__c values. The code also includes a Map<integer, Id> named techId.

```
1 public class WorkOrderClass {
2     public static void workOrder(List<WorkOrderc__c> newListWorkOrder){
3         Map<Integer, List<String>> maptotech = new Map<Integer, List<String>>();
4         integer num = 0;
5         List<WorkOrderc__c> properWo = new List<WorkOrderc__c>();
6         List<Assignment__c> lstAssignment = new List<Assignment__c>();
7         List<Technicianc__c> technicianAssignment = new List<Technicianc__c>();
8         for(WorkOrderc__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);
15
16                maptotech.put(num, lststring);
17            }
18        }
19        Map<integer, Id> techId = new Map<integer, Id>();
20    }
```

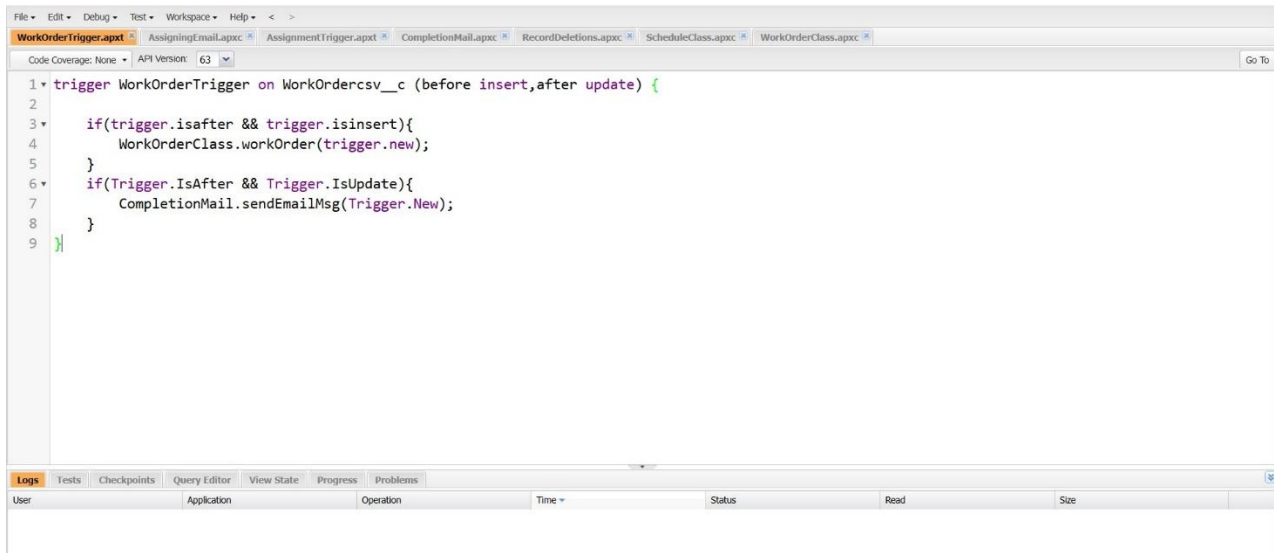
6. Save the code (click on file --> Save)

Create an Apex Trigger:

To create a new Apex Class follow the below steps:

Click on the file --> New --> Apex Class.

1. Give the Apex Trigger name as “Work Order Trigger”, and select “Work Order c” from the dropdown for Object.
2. Click Submit.
3. Now write the code logic here.

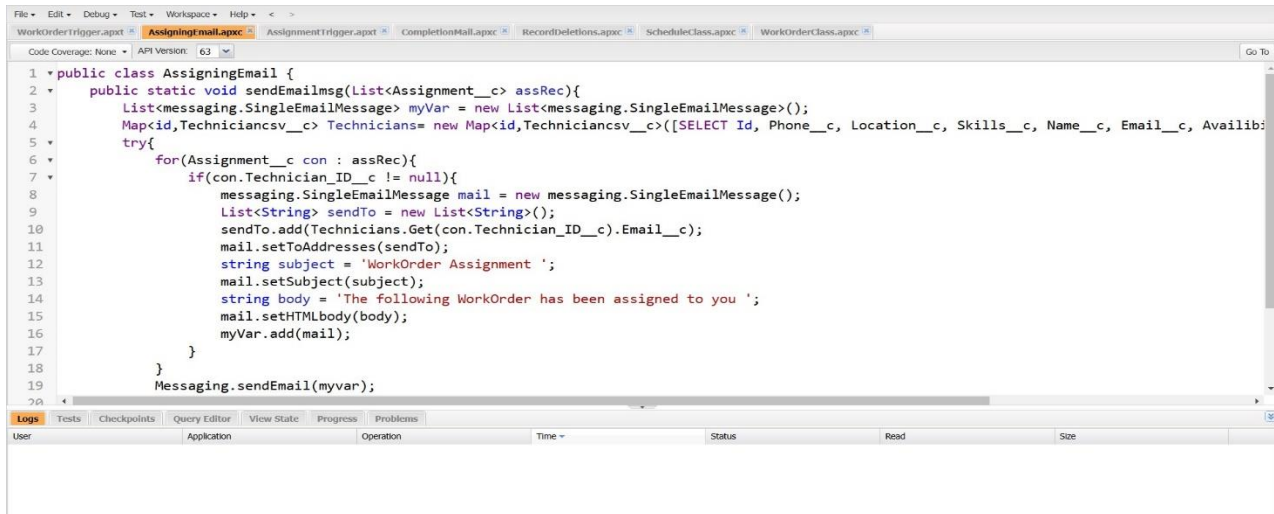


5. Save the code (click on file --> Save)

Create an Apex Class:

Go to Setup --> Click on the gear icon --> Select Developer Console.

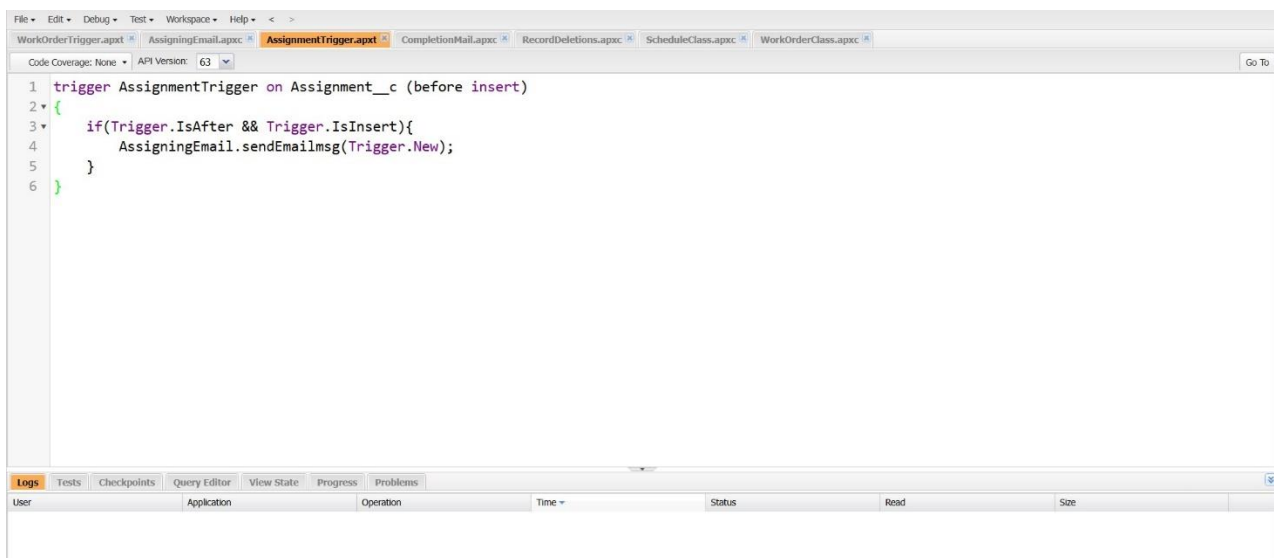
1. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
2. To create a new Apex Class follow the below steps:
Click on the file --> New --> Apex Class.
3. Give the Apex Class name as “Assigning Email”.
4. Click ok.
5. Now write the code logic here



Create an Apex Trigger:

To create a new Apex Class follow the below steps:

1. Click on the file --> New --> Apex Class.
2. Give the Apex Trigger name as “Assignment Trigger”, and select “Assignment c” from the dropdown for Object.
3. Click Submit
4. Now write the code logic here



5. Save the code. (click on file --> Save)

Create an Apex Class:

1. Go to Setup --> Click on the gear icon --> Select Developer Console.

2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.

3. To create a new Apex Class follow the below steps:

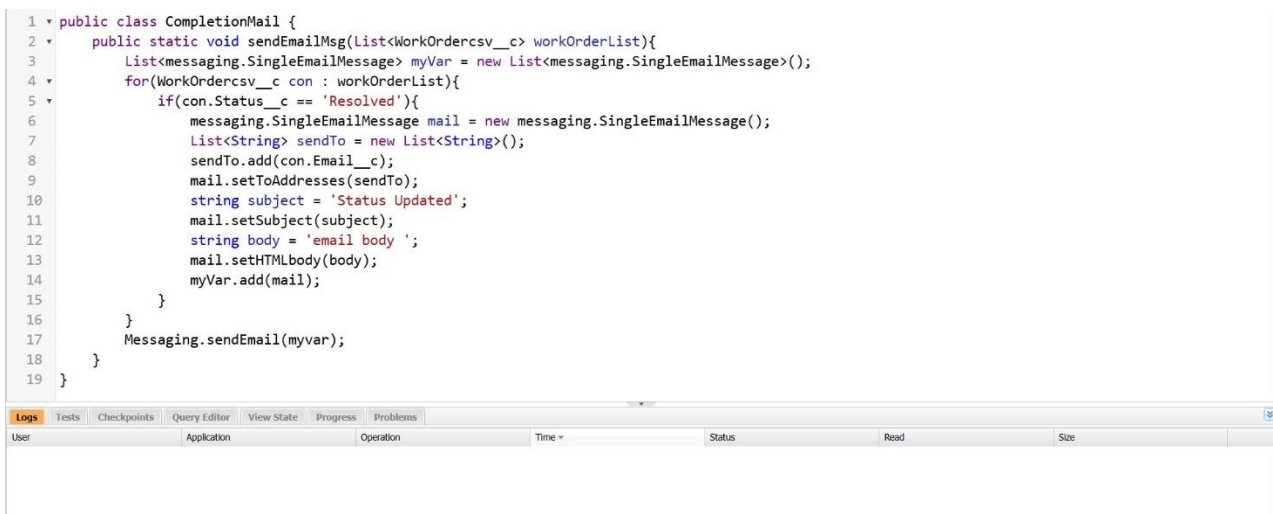
Click on the file --> New --> Apex Class.

4. Give the Apex Class name as “Completion Mail”.

5. Click ok.

6. Now write the code logic here

```
1 public class CompletionMail {
2     public static void sendEmailMsg(List<WorkOrdercsv__c> workOrderList){
3         List<messaging.SingleEmailMessage> myVar = new List<messaging.SingleEmailMessage>();
4         for(WorkOrdercsv__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);
15            }
16        }
17        Messaging.sendEmail(myVar);
18    }
19 }
```



The screenshot shows the Salesforce Developer Console interface. The top pane displays the Apex class code for 'CompletionMail'. The bottom pane shows the 'Logs' tab, which contains a table with columns: User, Application, Operation, Time, Status, Read, and Size. The table is currently empty.

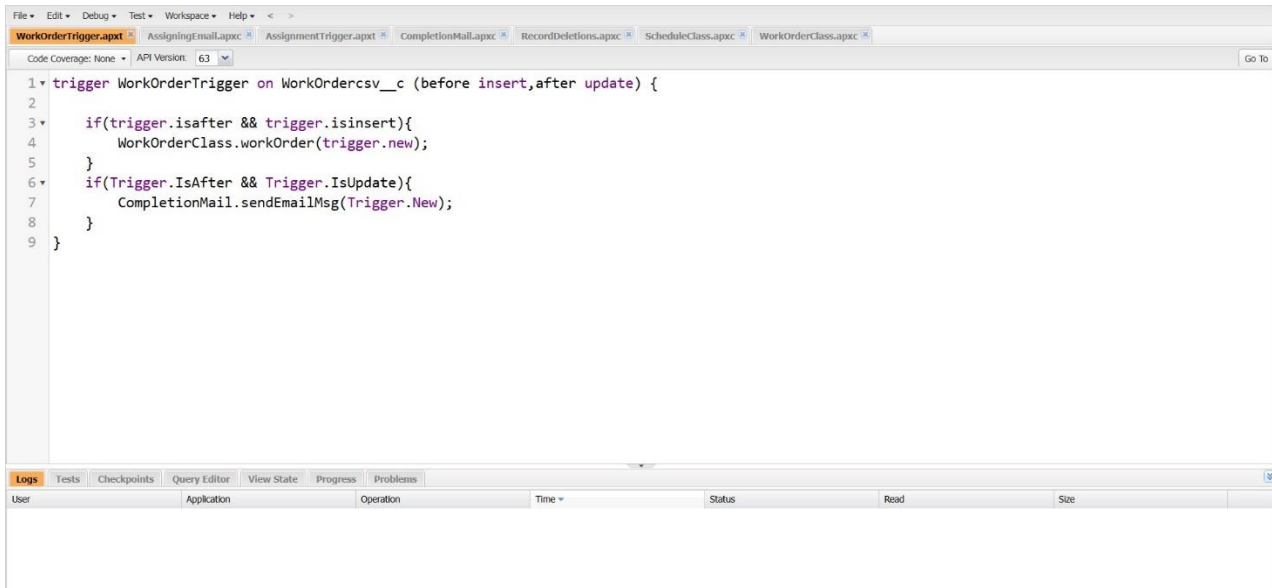
7. Save the code. (click on file --> Save)

Create an Apex Trigger:

1. Click on the file --> Open

2. A pop up window opens click on Triggers, then select “Work Order Trigger” and click on “Open”

3. Now write the code logic here.



4. Save the code. (click on file --> Save)

Create an Asynchronous Apex Class:

Create an Apex Class to Delete all the Work Order records which meets the following criteria.

1. Completed date should be more than 30 days.
2. Status should be ‘Resolved’.

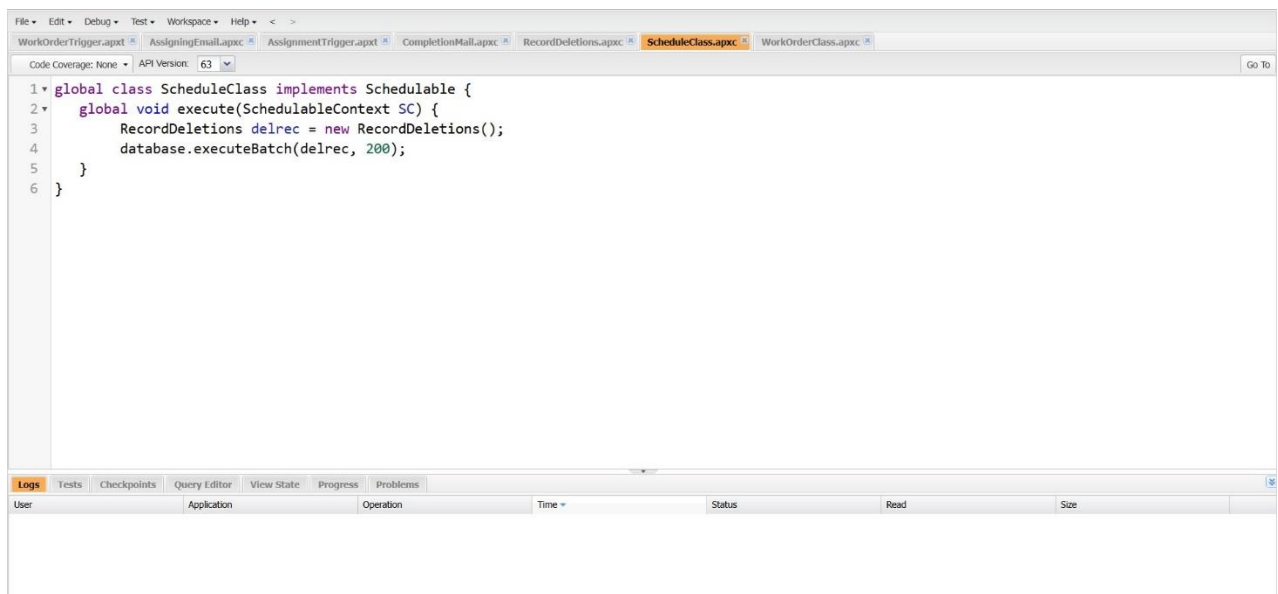
Create an Apex Class

1. Go to Setup --> Click on the gear icon --> Select Developer Console.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. Then create a new Apex Class follow the below steps:
Click on the file --> New --> Apex Class.

4. Give the Apex Class name as “Record Deletion”.
5. Click ok.
6. Now write the code logic here.
7. Save the code. (click on file --> Save)

Create an Apex Schedule Class:

1. Go to Setup --> Click on the gear icon --> Select Developer Console.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. To create a new Apex class follow the below steps:
Click on the file --> New --> Apex Class.
4. Give the Apex Class name as “Schedule Class”.
5. Click ok
6. Now write the code logic here

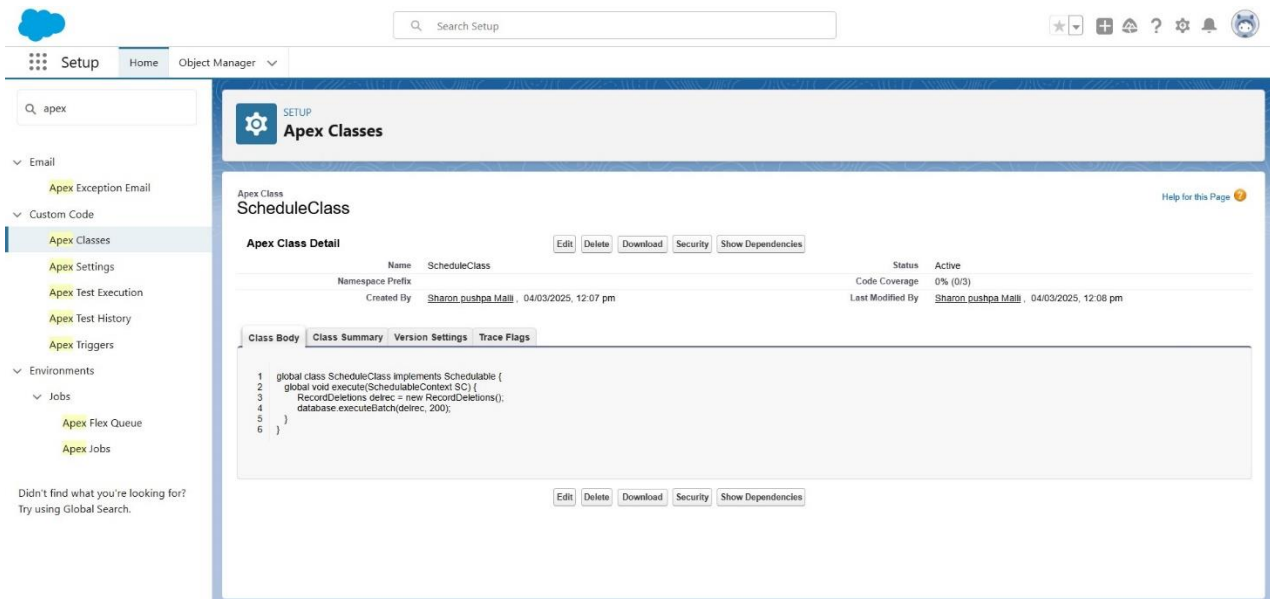


7. Save the code. (click on file & Save)

Create a Schedule Apex:

Schedule the Apex class:

1. From the Setup page search for “Apex Classes” in quick search.
2. Click on “Schedule Apex” as shown below.
3. Click on Schedule Apex and enter the Job name.
 - a. Job Name: Delete Assignment Schedule
 - b. Apex Class: Schedule Class (from clicking on lookup icon)
 - c. Frequency: Monthly
 - d. Preferred Start Time: Select any time
4. Click Ok



The screenshot shows the Salesforce Setup page with the 'Apex Classes' section selected. The left sidebar shows the navigation menu with 'Apex Classes' highlighted. The main content area displays the details for the 'ScheduleClass' Apex Class. The class is active and was created by Sharon Pushpa Malli on 04/03/2025 at 12:07 pm. The class body is visible, showing a global class implementing the Schedulable interface with a global void execute method.

Apex Class
ScheduleClass

Apex Class Detail

Name	Namespace Prefix	Status
ScheduleClass		Active

Created By: Sharon Pushpa Malli, 04/03/2025, 12:07 pm

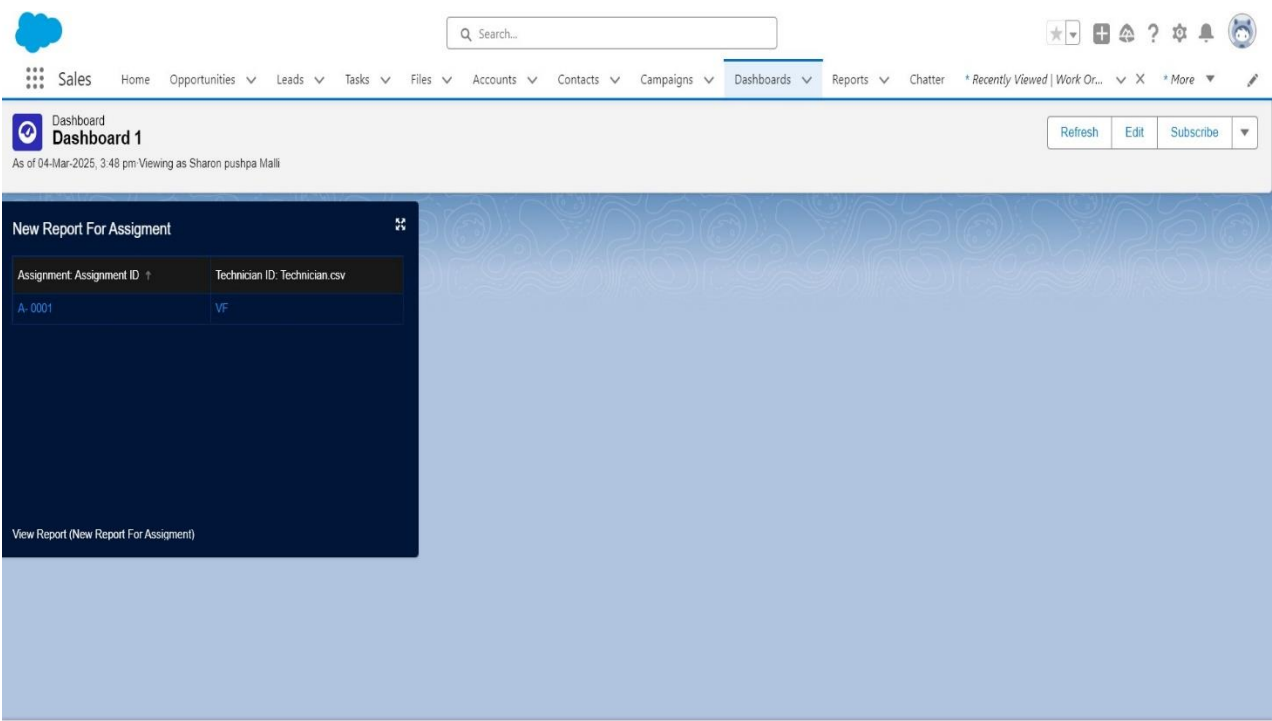
Last Modified By: Sharon Pushpa Malli, 04/03/2025, 12:08 pm

Code Coverage: 0% (0/3)

Class Body

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

Reports & Dashboards:



Conclusion:

The conclusion of field service work order optimization highlights the significant benefits of implementing streamlined processes, advanced technology, and data-driven decision-making. By optimizing work orders, organizations can enhance operational efficiency, reduce response times, minimize costs, and improve customer satisfaction.