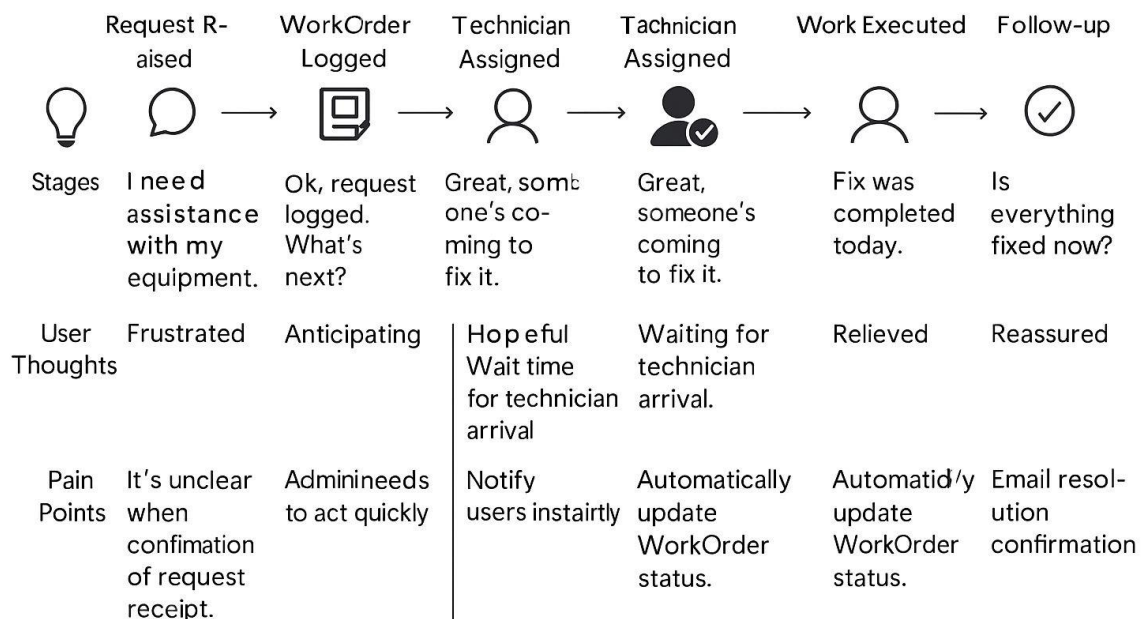


## CUSTOMER JOURNEY MAP

Date	25 June 2025
Team ID	LTVIP2025TMID31104
Project Name	Field Service Work Order Optimization

- The customer journey begins with the service manager facing delays in manual technician assignments and shifts to automated optimization using Salesforce.
- Technicians are auto-assigned based on skills, location, and availability, receiving instant email notifications.
- Managers track progress through real-time reports and dashboards, while old records are auto-cleaned to keep the system efficient.



## 1. Awareness

- **User:** Service Manager
  - **Experience:** Manual work order assignment is inconsistent and time-consuming.
  - **Emotions:** Frustrated, under pressure
  - **Thoughts:** “Technicians are not being assigned correctly. We're wasting time.”
  - **Opportunities:** Use automated Apex triggers to intelligently assign technicians based on location, skills, and availability.
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## 2. Onboarding

- **User:** Admin/Service Manager
  - **Experience:** Logs into Salesforce and accesses the Field Service Optimization App.
  - **Emotions:** Curious but unsure
  - **Thoughts:** “Is this system really going to simplify our operations?”
  - **Opportunities:** Guided app UI, tabs for each object (Technician, WorkOrder, Assignment), role-based access using profiles.
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## 3. Work Order Creation

- **User:** Dispatcher or Admin
  - **Experience:** Creates a new work order with fields like priority, location, and service type.
  - **Emotions:** Focused but slightly cautious
  - **Thoughts:** “I hope I selected the right technician info and status.”
  - **Opportunities:** Use picklists, validations, and formula fields for consistency and accuracy.
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## 4. Technician Assignment (Automation)

- **User:** System (Apex Trigger)
  - **Experience:** Automatically assigns the most suitable technician based on logic from the Apex class.
  - **Emotions:** Relieved (Manager), Confident (Technician)
  - **Thoughts:** “That was fast. The right technician is selected automatically.”
  - **Opportunities:** Real-time automation using triggers + skills/location logic.
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## 5. Email Notification (Technician)

- **User:** Technician
- **Experience:** Receives an email with assignment details.
- **Emotions:** Informed, prepared
- **Thoughts:** “Got it. I’m assigned to a new work order today.”

- **Opportunities:** Send automated emails using the AssigningEmail Apex class and trigger.
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## 6. Work Progress & Completion

- **User:** Technician
  - **Experience:** Completes the task and updates work order status to 'Resolved'.
  - **Emotions:** Accomplished
  - **Thoughts:** "Job done, updated the system."
  - **Opportunities:** Trigger email confirmation to the customer via CompletionMail class when status = Resolved.
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## 7. Reporting & Monitoring

- **User:** Admin/Manager
  - **Experience:** Uses reports to monitor assignments and dashboard to track work order status.
  - **Emotions:** Confident, informed
  - **Thoughts:** "Everything's visible and under control."
  - **Opportunities:** Customize reports (e.g. WorkOrders Status, Assignment Details), dashboard widgets.
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## 8. Maintenance & Clean-Up

- **User:** System (Scheduled Batch Job)
- **Experience:** Deletes resolved assignments older than 30 days.
- **Emotions:** Peace of mind
- **Thoughts:** "Old data won't clog the system anymore."
- **Opportunities:** Use RecordDeletions and ScheduleClass for auto-cleanup

