

Project Planning Phase

Date	25 February 2025
Team ID	LTVIP2025TMID31104
Project Name	Field Service WorkOrder Optimization
Maximum Marks	5 Marks

Objective

To plan and organize the development of a Salesforce-based system to optimize technician assignments, automate work order processing, and improve field service efficiency.

Scope of Work

- Technician Registration and Skill Management
- Work Order Creation and Field Updates
- Auto-assignment Logic Using Apex
- Email Notifications to Technicians and Customers
- Scheduled Cleanup of Completed Records
- Reports and Dashboards for Monitoring

Project Deliverables

Deliverable	Description
Requirements Document	Detailed system requirements and user roles
Data Model Design	Custom objects (Technician, WorkOrder, Assignment)

Deliverable	Description
UI Layouts	Tabs, page layouts, and Lightning App
Working Salesforce App	End-to-end technician assignment automation
User Guide	Steps for using the system and managing records
QA Reports	Test cases, bug reports, and validation results

Timeline (Tentative)

Phase	Duration	Key Activities
Requirement Gathering	2–3 days	Identify features, fields, and automation needs
Design Phase	3–4 days	Create object models, validation rules, page layouts
Development Phase	1–2 weeks	Build objects, triggers, Apex classes, automation
Integration & Testing	4–5 days	Test assignment logic, email flows, dashboards
Deployment & Documentation	3 days	Deploy to production and finalize user guides

Resources Required

Resource Type

Salesforce Tools

Team

Testing Tools

Role

Apex Classes, Flows, Reports

Developer, Tester, Admin

Developer Console, Test Data

Risk Management

Risk

Incorrect Technician Matching

Email Not Sent

Overloaded Data

Mitigation Strategy

Use validation + debug logs + unit testing

Ensure valid email fields, add exception handling in Apex

Use batch + schedule classes to clean up old records

Success Metrics

- 100% automated technician assignment
- Intelligent matching based on skills, location, and availability
- Reduced assignment time by 70%
- Real-time dashboard visibility for managers

Product Backlog, Sprint Schedule, and Estimation (4 Marks)

Use the below template to create product backlog and sprint schedule

Sprint Functional Requirement (Epic)	User Story Number	User Story / Task	Story Points	Priority	Team Members
Technician Management	FSW-1	As an admin, I can add and manage technician records including location and skill set.	3	High	Team A
WorkOrder Creation	FSW-2	As a user, I can create work orders with service type, location, and priority.	2	High	Team A
Auto Assignment	FSW-3	As a system, I want to auto-assign a technician based on availability, skill, and location.	5	High	Team B

Email Notification	FSW-4	As a technician, I should receive email alerts upon assignment.	2	Medium	Team B
WorkOrder Update	FSW-5	As a technician, I can update the status of work orders.	2	High	Team C
Dashboard View	FSW-6	As a manager, I can view work order stats in dashboards.	3	Medium	Team C

Project Tracker, Velocity & Burndown Chart: (4 Marks)

Sprint	Total Story Points	Sprint Duration	Sprint Start Date	Sprint End Date (Planned)	Story Points Completed
Sprint-1	17	6 Days	01 July 2025	06 July 2025	17
Sprint-2	12	6 Days	08 July 2025	13 July 2025	12
Sprint-3	10	6 Days	15 July 2025	20 July 2025	