

# Field Service Work Order Optimization

## INTRODUCTION:

The Field Service Work Order Optimization System streamlines operations for a company providing installations and repairs. Utilizing a robust database, the system efficiently matches work orders with skilled technicians based on technician's location, availability, and skills. The system employs a prioritization algorithm, focusing on assigning tasks to technician. Automated communication keeps technicians informed, while analytics offer insights for continuous improvement. Overall, this solution maximizes efficiency, reduces operational costs, and improves customer satisfaction in the dynamic realm of field service operations.

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Creating a Salesforce Developer Edition org allows developers to experiment, innovate, and build customized solutions within a controlled environment. With access to Salesforce'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.

As a Salesforce Developer for an organization, you must have a Salesforce Developer Edition org in order to do all the required works.

## ACTIVITY 1: Creating Developer Account

Creating a developer org in Salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the signup form, enter the following details:

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Fields to fill in:

1. FirstName:Rekhabai
2. LastName:Kalyankar
3. Email: kr637918@gmail.com
4. Role:Developer
5. Company:GAYATRIDEGREECOLLEGE
6. Country: India

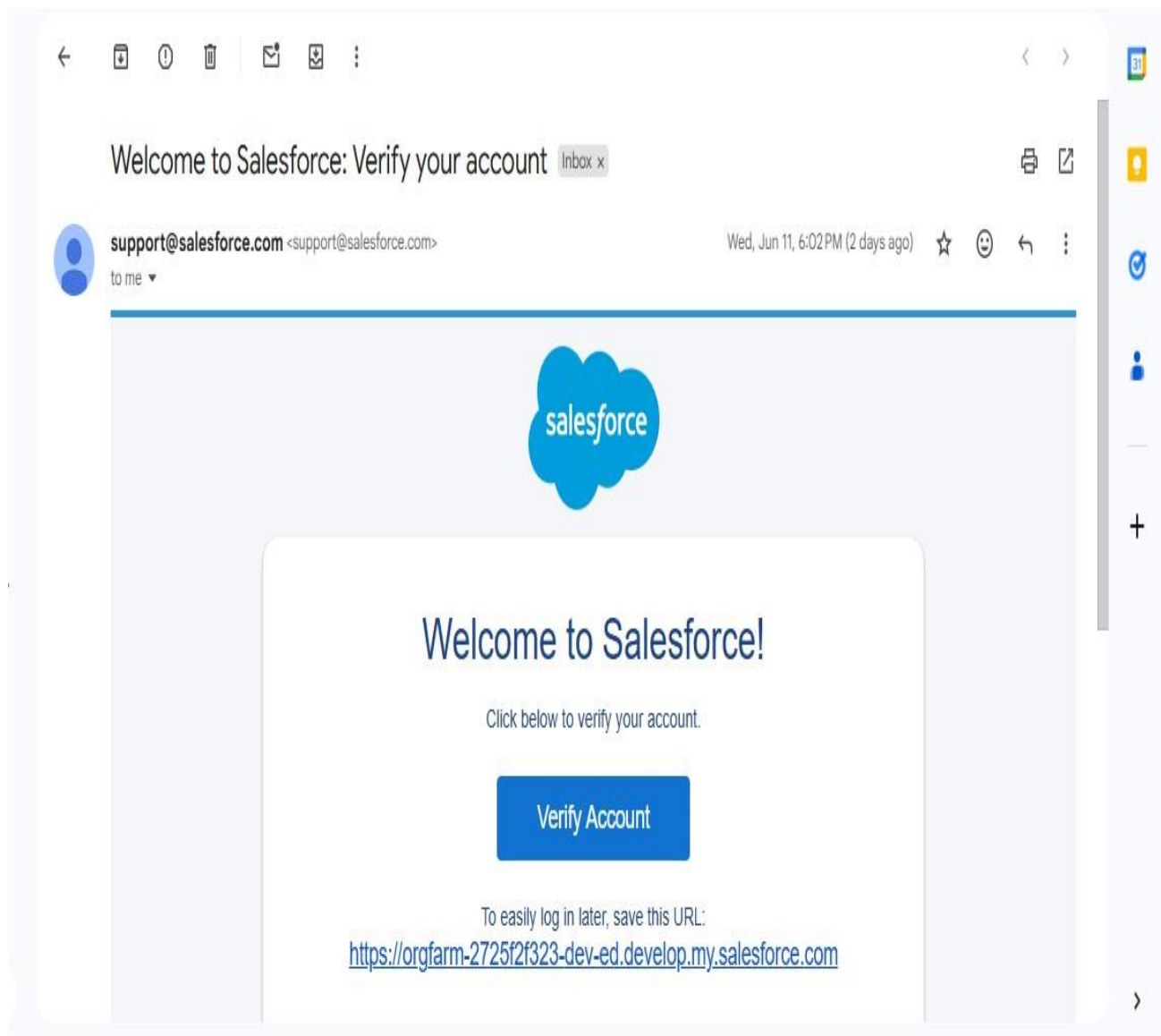
This need not be an actual Email ID, you can give anything in the format  
[:username@organization.com](#)

Click on sign me up after filling these.

**ACTIVITY 2:** Account Activation

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1. Goto 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.

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Change Your Password

Enter a new password for lead@sb.com.  
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
▼ In what city were you born?

\* Answer  
asdfghjkl

Change Password

4. Then you will redirect to your Salesforce setup page.

Search Setup

Setup Home Object Manager

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

**Real-time Collaborative Docs**  
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.  
Get Started

Setup Home  
Service Setup Assistant  
Multi-Factor Authentication Assistant  
Release Updates  
Lightning Experience Transition Assistant  
Salesforce Mobile App  
Lightning Usage  
Optimizer  
ADMINISTRATION  
> Users

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**Object:** To store the data as per business requirement.

## ACTIVITY 1: Create Technician Object

1. Download and open [this spreadsheet](#), edit the email column (provide your email for at least one or two records) and save it as Technician.csv.
2. Log into your salesforce account, click on Gear icon, then select Setup.
3. Click the Object Manager tab.



4. Click Create.
5. Select Custom Object from Spreadsheet.

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6. Click Login With Salesforce.
7. Enter your Salesforce account username and password. (which you have created in the Milestone 1, Activity 1)
8. Click Log In.
9. Click Allow.
10. Click Upload.
11. Navigate to the Technician.csv file you downloaded and upload it. Salesforce automatically detects the fields and populates all its record data. Choose Technician ID as the Record Name field and make sure all fields are with the proper datatypes as below as they are.

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CSV File Details

Encoding Format <sup>1</sup>  Values Separated By  Field Label Source ☐ Enter manually ☒ Detect from row \* Field Labels Row  Import 5 rows of Data? <sup>1</sup> ☒ No, skip import ☐ Yes, import data Record Name Field <sup>1</sup>

Fields 7 of 7 to import ☐ Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS <sup>1</sup>	FIELD PREVIEW
✓ Technician ID	Technician ID	<input type="text" value="Text"/>	<input checked="" type="checkbox"/>	T-0001
✓ Name	Name	<input type="text" value="Text"/>	<input checked="" type="checkbox"/>	Raghu
✓ Phone	Phone	<input type="text" value="Phone"/>	<input checked="" type="checkbox"/>	7892341560
✓ Email	Email	<input type="text" value="Email"/>	<input checked="" type="checkbox"/>	example@gmail.com
✓ Location	Location	<input type="text" value="Picklist"/>	<input checked="" type="checkbox"/>	Hyderabad
✓ Availability	Availability	<input type="text" value="Picklist"/>	<input checked="" type="checkbox"/>	Available
✓ Skills	Skills	<input type="text" value="Picklist"/>	<input checked="" type="checkbox"/>	Machine Installation

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12. Click Next and enter the following settings.

13. Click Finish. The Technician object is successfully created and data imported, all within minutes.

## ACTIVITY 2: Create Work Order Object

Create Work Order object, just as we have created Technician Object using [this spreadsheet](#):

CSV File Details

Encoding Format <sup>1</sup>  Values Separated By  Field Label Source ☐ Enter manually ☒ Detect from row \* Field Labels Row  Import 0 rows of Data? <sup>1</sup> ☒ No, skip import ☐ Yes, import data Record Name Field <sup>1</sup>

Fields 7 of 7 to import ☐ Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS <sup>1</sup>	FIELD PREVIEW
✓ WorkOrder ID	WorkOrder ID	<input type="text" value="Text"/>	<input checked="" type="checkbox"/>	
✓ Email	Email	<input type="text" value="Email"/>	<input checked="" type="checkbox"/>	
✓ Service Type	Service Type	<input type="text" value="Picklist"/>	<input checked="" type="checkbox"/>	
✓ Description	Description	<input type="text" value="Text Area (Long)"/>	<input checked="" type="checkbox"/>	
✓ Location	Location	<input type="text" value="Picklist"/>	<input checked="" type="checkbox"/>	
✓ Priority	Priority	<input type="text" value="Picklist"/>	<input checked="" type="checkbox"/>	
✓ Status	Status	<input type="text" value="Picklist"/>	<input checked="" type="checkbox"/>	

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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** Save Save & New Cancel

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

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

Object Name  Example: account

Description

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

Content Name

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2. Click on Allow reports,  
Allow search, Enter Save  
or Enter Record Name Label and Format

- RecordName-->AssignmentID
- DataType --> AutoNumber
- DisplayFormat-->A-{0000}
- StartingNumber-->1

## Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" a

Record Name

Assignment ID

Example: Account Name

Data Type

Auto Number ▼

Display Format

A-{0000}

Example: A-{0000} What Is This?

Starting Number

1

## Tabs

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

## ACTIVITY 1: Creating a Custom Tab

To create a Tab: (Assignment)

1. Go to setup page --> type Tabs in Quick Find bar --> click on tabs --> New (under custom object tab)

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## Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external content, allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation bar. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.



**Custom Object Tabs** [New](#) [What Is This?](#)

No Custom Object Tabs have been defined

**Web Tabs** [New](#) [What Is This?](#)

No Web Tabs have been defined

2. SelectObject(Assignment) -->Selectanytabstyle -->Next(Addtoprofilespace)  
keep it as default --> Next (Add to Custom App) keep it as default --> Save.


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## New Custom Object Tab

### Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object	<input type="text" value="Assignment"/>
Tab Style	<input type="text" value="--None--"/> 

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link	<input type="text" value="--None--"/>
-------------------------	---------------------------------------

Note: Tabs for Work Order & Technician objects do get created automatically. We do not need to create tabs for those objects.

### 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

### ACTIVITY 1: Create a Lightning App

To create a lightning app page:

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

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App Manager | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home App Manager

Q app manager

App Manager

Lightning Experience App Manager

Clone App (Beta)

Enable App Cloning

35 Items • Sorted by App Name • Filtered by All app owners • Tablet Type

	App Name ↑	Developer Name	Description	Last Modified ..	App Type	VL
1	AI Tab	AI Tab		04/12/2022, 10:13 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	✓
3	App Launcher	App Launcher	App Launcher tabs	04/12/2022, 10:13 am	Classic	✓
4	Best Solutions	Lightning Bolt	Discover and manage business solutions designed for your industry.	04/12/2022, 10:16 am	Lightning	✓
5	Chatter Desktop	Chatter Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connecte..	28/12/2022, 4:04 pm	Connected (Managed)	
6	Chatter Mobile for BlackBerry	Chatter for BlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fee..	28/12/2022, 4:05 pm	Connected (Managed)	
7	College Management System	ixademo	demo app	08/12/2022, 4:16 pm	Lightning	✓
8	Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	✓
9	Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	✓
10	Data Manager	Data Manager	Use Data Manager to view limits, monitor usage, and manage recpet.	04/12/2022, 10:13 am	Lightning	✓

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

**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.

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New Lightning App

## App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.


### App Details


\* App Name ⓘ  
Name your app...

\* Developer Name ⓘ  
Enter a developer name...

Description ⓘ  
Enter a description...

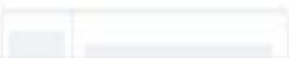
### App Branding



Image ⓘ  
  
[Upload](#)

Primary Color Hex Value ⓘ  
 #007002

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

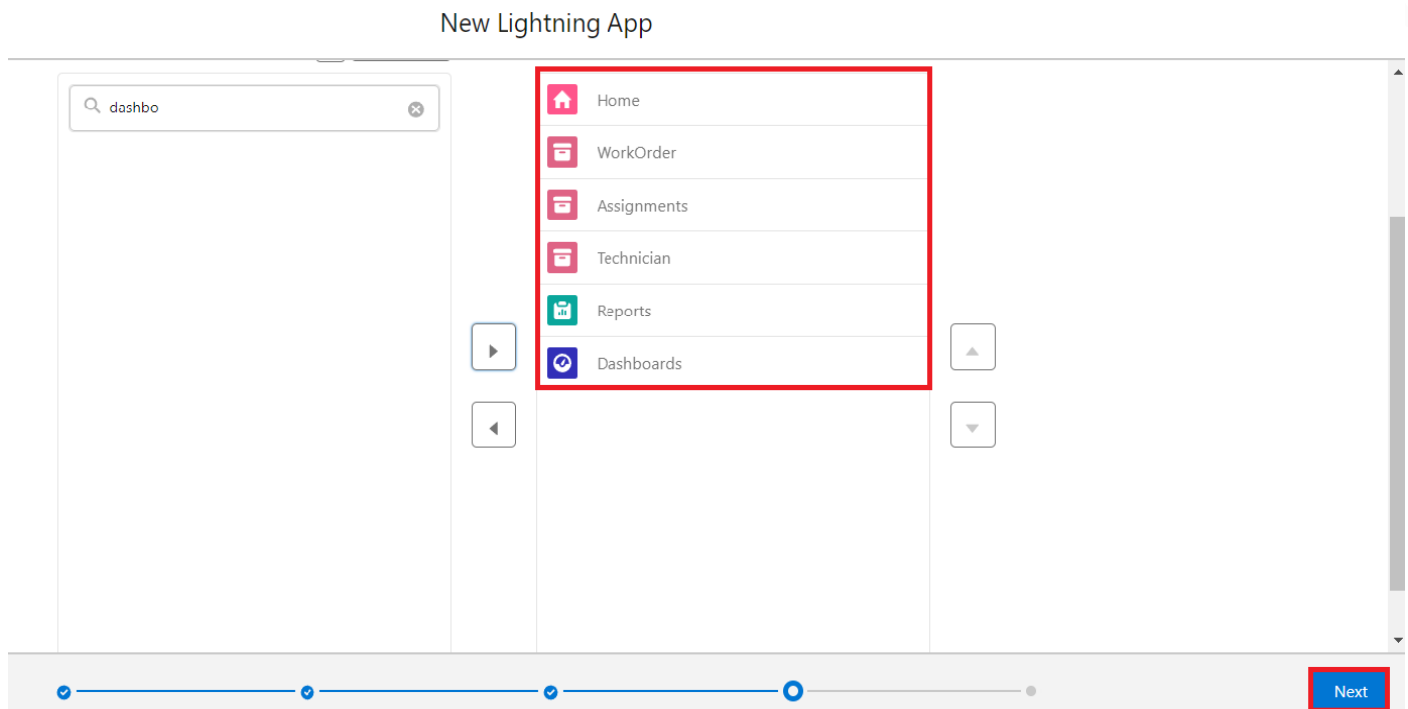
### App Launcher Preview



[Next](#)

4. ToAddNavigationItems:

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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 ? Next.  
Note: select as set the custom object which we have created in the previous activity.

5. To Add User Profiles:



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New Lightning App

## User Profiles

Choose the user profiles that can access this app.

Available Profiles

Selected Profiles

System administrator

System Administrator

Save & Finish

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.

### ACTIVITY 1: 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.

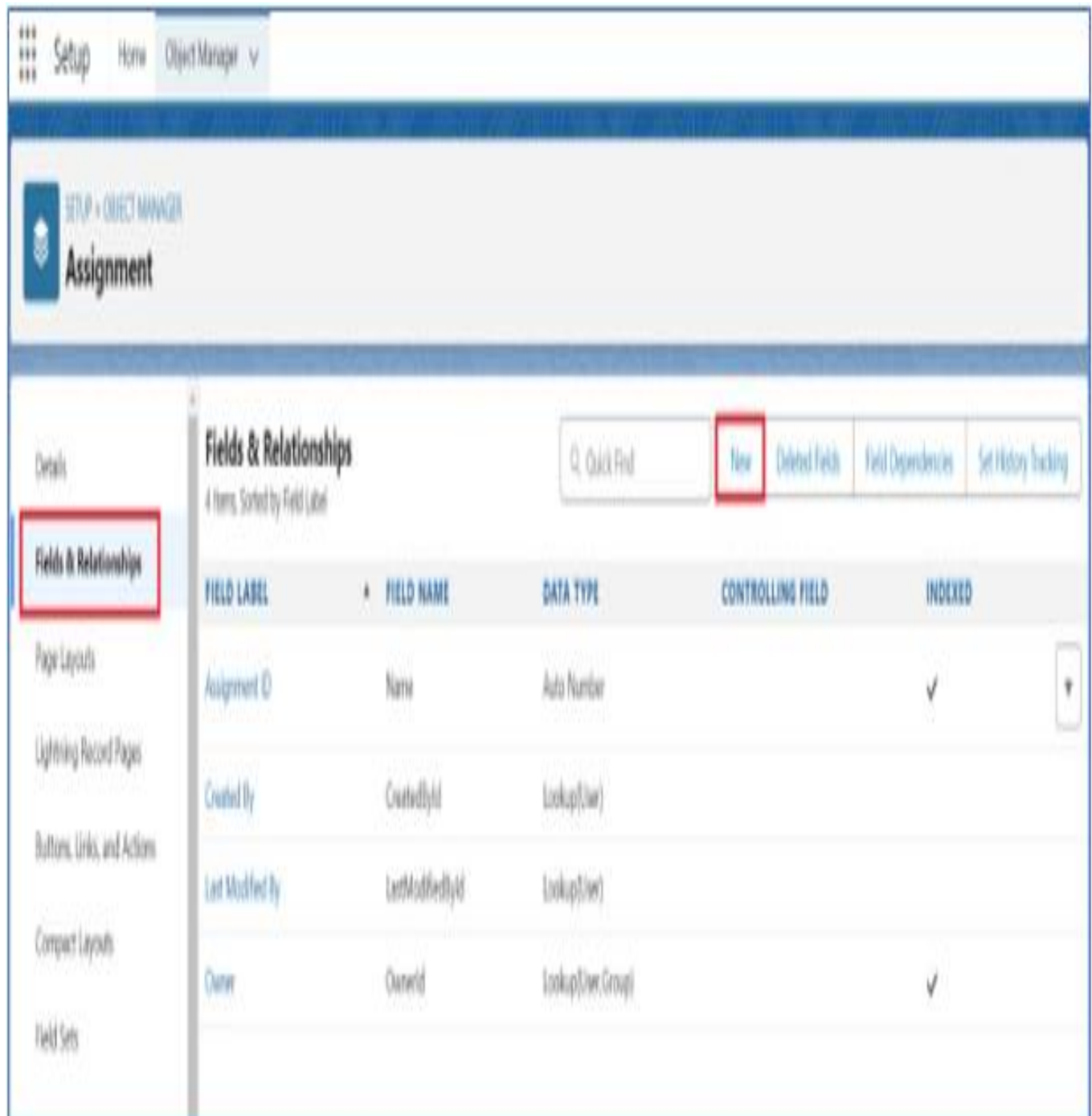
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The screenshot shows the Salesforce Object Manager interface. At the top, the navigation bar includes 'Setup', 'Home', and 'Object Manager' (highlighted with a red box and a red arrow pointing left). Below the navigation bar, the 'Object Manager' section is displayed, featuring a search bar with 'assignment' entered (highlighted with a red box and a red arrow pointing right), and buttons for 'Schema Builder' and 'Create'. Below this, a table lists objects. The first row, 'Assignment', is highlighted with a red box and a red arrow pointing left. The second row, 'Location Group Assignment', is also visible.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Assignment	Assignment_c	Custom Object		20/11/2023	✓
Location Group Assignment	LocationGroupAssignment	Standard Object			

2. Now click on "Fields & Relationships" --> New

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Setup - Object Manager Assignment

Fields & Relationships

4 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Assignment ID	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓

3. Select Datatype as “Lookup”.

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Step 1. Choose the field type

Step 1

**Next** Cancel

Specify the type of information that the custom field will contain.

## Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary 

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☒ Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records

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- 4. Click on Next
- 5. For field label related to: select “Work Order” object and click Next.

Note: Do not select other standard object with the same name for sake of ease copy the above and paste it.

Assignment

New Relationship

Help for this Page ?

Step 2. Choose the related object

Step 2

Previous

Next

Cancel

Select the other object to which this object is related.

Related To

WorkOrder

▼

Previous

Next

Cancel

- 6. Give Field Label as “Work Order ID” and click Next.

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Assignment  
New Relationship

[Help for this Page](#)

Step 3. Enter the label and name for the lookup field Step 3 of 6

[Previous](#) [Next](#) [Cancel](#)

Field Label  ⓘ

Field Name  ⓘ

Description

Help Text  ⓘ

7. Next -->Next -->Save&New.

## ACTIVITY2:Manageyourpicklistvalues

1. Fromthesetuppagegotoobjectmanager
2. SearchandSelectWork Orderobject.
3. Gotofields&relationship,selectLocationfield,scrolldowntovaluesandclick “New”.

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Values

New

Reorder

Replace

Printable View

Chart Colors ▼

Delete Selected

Deactivate Selected

Replace Selected

<input type="checkbox"/> Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit   Del   Deactivate	Pune	Pune	<input type="checkbox"/>	Assigned dynamically	<u>demo project</u> , 22/11/2023, 9:53 am
<input type="checkbox"/> Edit   Del   Deactivate	Hyderabad	Hyderabad	<input type="checkbox"/>	Assigned dynamically	<u>demo project</u> , 22/11/2023, 9:53 am

4. Add the below values:

- Nasik
- Warangal
- Nanded

5. Click Save.

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Add Picklist Values

## Location

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.

Nasik  
Warangal  
Nanded

SaveCancel

### ACTIVITY3:Manageyourpicklistvalues

AddfollowingvaluestotherespectivefieldsinWork Orderobject:

Field	Values
Priority	High
Service Type	Hardware repair Troubleshoot/Debug ging Lane- Management

### ACTIVITY4:CreatingFormulaFieldinWork OrderObject

1. Repeatstep1and2mentionedinactivity1
2. SelectDatatypeas“Formula”andclickNext.
3. GiveFieldLabelandFieldNameas“Date”andselectformulareturntypeas“Date” andclicknext.



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Step 2. Choose output type

Step 2 of 5

Previous Next Cancel

Field Label

Field Name

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity [i](#)

## Formula Return Type

- ☐ None Selected Select one of the data types below.
- ☐ Checkbox Calculate a boolean value.  
Example: `TODAY() > CloseDate`
- ☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: `Gross Margin = Amount - Cost c`
- ☒ Date Calculate a date, for example, by adding or subtracting days to other dates.  
Example: `Reminder Date = CloseDate - 7`
- ☐ Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.  
Example: `Next = NOW() + 1`
- ☐ Number Calculate a numeric value.  
Example: `Fahrenheit = 1.8 * Celsius c + 32`
- ☐ Percent Calculate a percent and automatically add the percent sign to the number.  
Example: `Discount = (Amount - Discounted Amount c) / Amount`
- ☐ Text Create a text string, for example, by concatenating other text fields.  
Example: `Full Name = LastName & ", " & FirstName`
- ☐ Time Calculate a time, for example, by adding a number of hours to another time.  
Example: `Next = TIMEVALUE(NOW()) + 1`

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

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Formula: CreatedDate

The screenshot shows a web-based interface for creating a formula. At the top, there are two tabs: "Simple Formula" and "Advanced Formula". Below the tabs is a button labeled "Insert Field". The main area contains a text input field with the text "Date (Date) =". Below this, the text "CreatedDate" is entered and highlighted with a red rectangular border. At the bottom left, there is a button labeled "Check Syntax". To the right of this button, a green message states: "No syntax errors in merge fields or functions. (Compiled size: 20 characters)".

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

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## ACTIVITY5: Creating Remaining fields for the respective objects

Now create the remaining fields using the datatypes mentioned in the table.

Sl No	Object Name	Field	
		FieldName	Datatype
1	Assignment	<ul style="list-style-type: none"><li>TechnicianID</li><li>Assignment Date</li><li>Completion Date</li></ul>	<p>Lookup(Technician)</p> <p>Formula: return type : Date (Work Order_IDr.Datec)</p> <p>Formula: return type : Date IF(ISPICKVAL(Work Order_IDr.Statusc,'Resolved'), Work Order_IDr.LastModifiedDate , NULL)</p>

## Profiles

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

## ACTIVITY1: Technician Profile

1. Go to setup --> type profiles in quick find box --> click on profiles --> click on new profile.

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## Profiles

Help for this Page

All Profiles ▾ Edit | Delete | Create New View

New Profile

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

A

<input type="checkbox"/>	Action	Profile Name ↑	User License	Custom
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Analytics Cloud Integration User</a>	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Analytics Cloud Security User</a>	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Authenticated Website</a>	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Authenticated Website</a>	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">...</a>	<a href="#">B2B Reordering Portal Buyer Profile</a>	External Apps Login	<input checked="" type="checkbox"/>

2. .Select ‘StandardPlatformUser’ forexistingprofileandgive ‘Technician’ forProfileNameand clickonSave.

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## Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	<input type="text" value="Standard Platform User"/>
User License	Salesforce Platform
Profile Name	<input type="text"/>

3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give Read only access permissions for Technician, Work Order and Assignment objects and field access permission as shown below:

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Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assignments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bookings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Candidates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Child object	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment Websites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flights	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jewel Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job Applications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lead Scoring Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Leaves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent object 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent object 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Passengers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
StudentSessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technician	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trainers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WorkOrder	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Field Service Work Order Optimization

5. Scroll down and Click on Save.
6. Now from the profile detail page scroll down to custom field level security click on view next to Work Order object.

Custom Field-Level Security	
Asset <a href="#">View</a>	Lead Scoring Rule <a href="#">View</a>
Asset Service <a href="#">View</a>	Leave <a href="#">View</a>
Assignment <a href="#">View</a>	Parent object 1 <a href="#">View</a>
Billing <a href="#">View</a>	Parent object 2 <a href="#">View</a>
Booking <a href="#">View</a>	Passenger <a href="#">View</a>
Candidate <a href="#">View</a>	Position <a href="#">View</a>
Child object <a href="#">View</a>	Price <a href="#">View</a>
Crew <a href="#">View</a>	Project <a href="#">View</a>
Customer Order <a href="#">View</a>	ProjectTask <a href="#">View</a>
Employee <a href="#">View</a>	Review <a href="#">View</a>
Employment Website <a href="#">View</a>	Sessions <a href="#">View</a>
Flight <a href="#">View</a>	Student <a href="#">View</a>
Item <a href="#">View</a>	StudentSession <a href="#">View</a>
Jewel Customer <a href="#">View</a>	Technician <a href="#">View</a>
Job Application <a href="#">View</a>	Trainer <a href="#">View</a>
Knowledge <a href="#">View</a>	WorkOrder <a href="#">View</a>

7. Click on Save.

# Field Service Work Order Optimization

## Users:

Users are defined as the employees of your organization

### ACTIVITY 1: Create User

1. Go to setup-->type users in quick find box-->select users-->click New user.
2. Fill in the fields
  1. FirstName: Elina
  2. LastName: Gilbert
  3. Alias: Give a 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. Role:
  8. User license: Salesforce Platform
  9. Profiles: Technician



# Field Service Work Order Optimization

## New User

[Help for this Page](#)

User Edit

Save

Save & New

Cancel

General Information

= Required Information

First Name

Elina

Last Name

Gilbert

Alias

elina

Email

nadeem@thesmartbridge.com

Username

elina@smart.com

Nickname

elina

Title

Company

Department

Division

Role

<None Specified>

User License

Salesforce Platform

Profile

Technician

Active

☒

Marketing User

☐

Offline User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

Site.com Contributor User

☐

Site.com Publisher User

☐

WDC User

☐

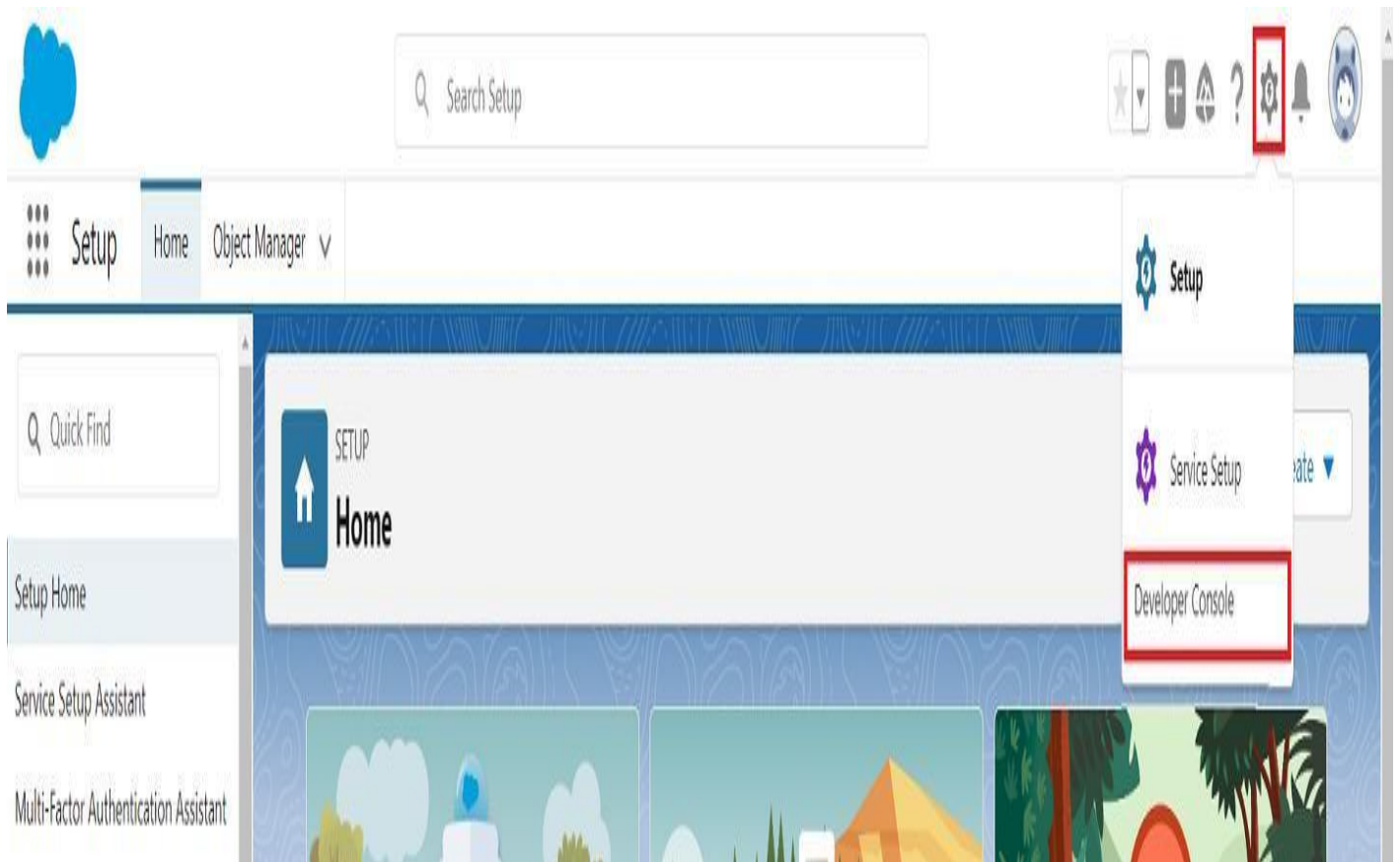
3. Save

# Field Service Work Order Optimization

## ApexTrigger

### ACTIVITY 1: Create an Apex Class

1. Goto 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.

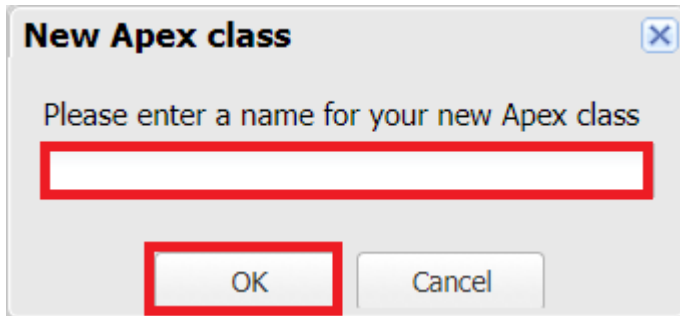
3. To create a new Apex Class follow the below steps: Click on the file --> New --> Apex Class.

# Field Service Work Order Optimization



# Field Service Work Order Optimization

4. Give the Apex Class name as "Work OrderClass".



**New Apex class** [X]

Please enter a name for your new Apex class

OK Cancel

5. Click OK.

6. Now write the code logic here

# Field Service Work Order Optimization

```
File • Edit • Debug • Test • Workspace • Help • < >
WorkOrderTrigger.apxc WorkOrderClass.apxc
Code Coverage: None • API Version: 59 • Go

1 public class WorkOrderClass {
2     public static void workOrder(List<WorkOrder__c> newListWorkOrder){
3         Map<Integer, List<String>> maptotech = new Map<Integer, List<String>>();
4         integer num = 0;
5         List<WorkOrder__c> properWo = new List<WorkOrder__c>();
6         List<Assignment__c> lstAssignment = new List<Assignment__c>();
7         List<Technician__c> technicianToAssignment = new List<Technician__c>();
8         for(WorkOrder__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        Map<Id, Technician__c> allTechnician = new Map<Id, Technician__c>([SELECT Id, Name, Phone__c, Location__c, Skills__c, Availability__c, Name__c, Email__c FROM Technician__c]);
21        integer num2 = 0;
22        For(Technician__c T : allTechnician.values()){
23            num2 = num2+1;
24            if(maptotech.get(num2) != null){
25                List<string> valofmap = maptotech.get(num2);
26                system.debug('error 1 ----> the maptotech is empty ----> ' + maptotech.get(num2));
27            if(valofMap.contains(t.Skills__c) && ValofMap.contains(t.Location__c) && t.Availability__c == 'Available'){
28                techid.put(num2, t.Id);
29            }
30        }
31
32    }
33    integer num3 = 0;
34    For(WorkOrder__c W : properWo){
```

# Field Service Work Order Optimization

## SourceCode:

```
public class Work OrderClass{
    public static void Work Order(List<Work OrderC> newListWork
        Order){
        Map<Integer,List<String>>maptotech=new map<Integer,List<
        String>>(); integer num = 0;
        List<Work Orderc> properWo = new List<Work Orderc>();
        List<Assignmentc> lstAssignment = new
        List<Assignmentc>();
        List<Technicianc>technicianToAssignment=new List<Technici
        anc>(); for(Work Orderc iter : newListWork Order){
            List<String> lststring = new List<string>();
            If(iter.Service_Typec!=null&&iter.Locationc!=n
            ull){
                num = num+1;
                properWo.add(iter);
                lststring.add(iter.Service_Typec);
                lststring.add(iter.Locationc);

                maptotech.put(num,lststring);
            }
        }
        Map<integer,Id>techId=new Map<integer,Id>();
        Map<Id,Technicianc>allTechnician=new Map<Id,Technicianc>([SELECTId,Name,P
        honec, Locationc, Skillsc,Availibilityc, Namec, Emailc FROMTechnicianc]);
        integernum2=0;
        For(TechniciancT:allTechnician.value
            s()){ num2 = num2+1;
            if(maptotech.get(num2)!=null){
                List<string>valofmap=maptotech.get(num2);
                system.debug('error 1 ----> the maptotech is empty ---> ' + maptotech.get(num2));
                if(valofMap.contains(t.Skillsc)&&ValofMap.contains(t.Locationc)&&t.Availibilityc=
                ='Available'){
                    techid.put(num2,t.Id);
```

## Field Service Work Order Optimization

```
}  
}  
  
}  
integernum3=0;  
For(Work  
    OrdercW:properWo){    num3  
    = num3 + 1;  
    AssignmentcA=newAssignmentc();  
    A.Work    Order_IDc    =    W.Id;  
    A.Technician_IDc        =  
    techid.get(num3);  
    lstAssignment.add(A);  
}  
If(!lstAssignment.IsEmpty(  
    )){ insert lstAssignment;  
}  
}  
}
```

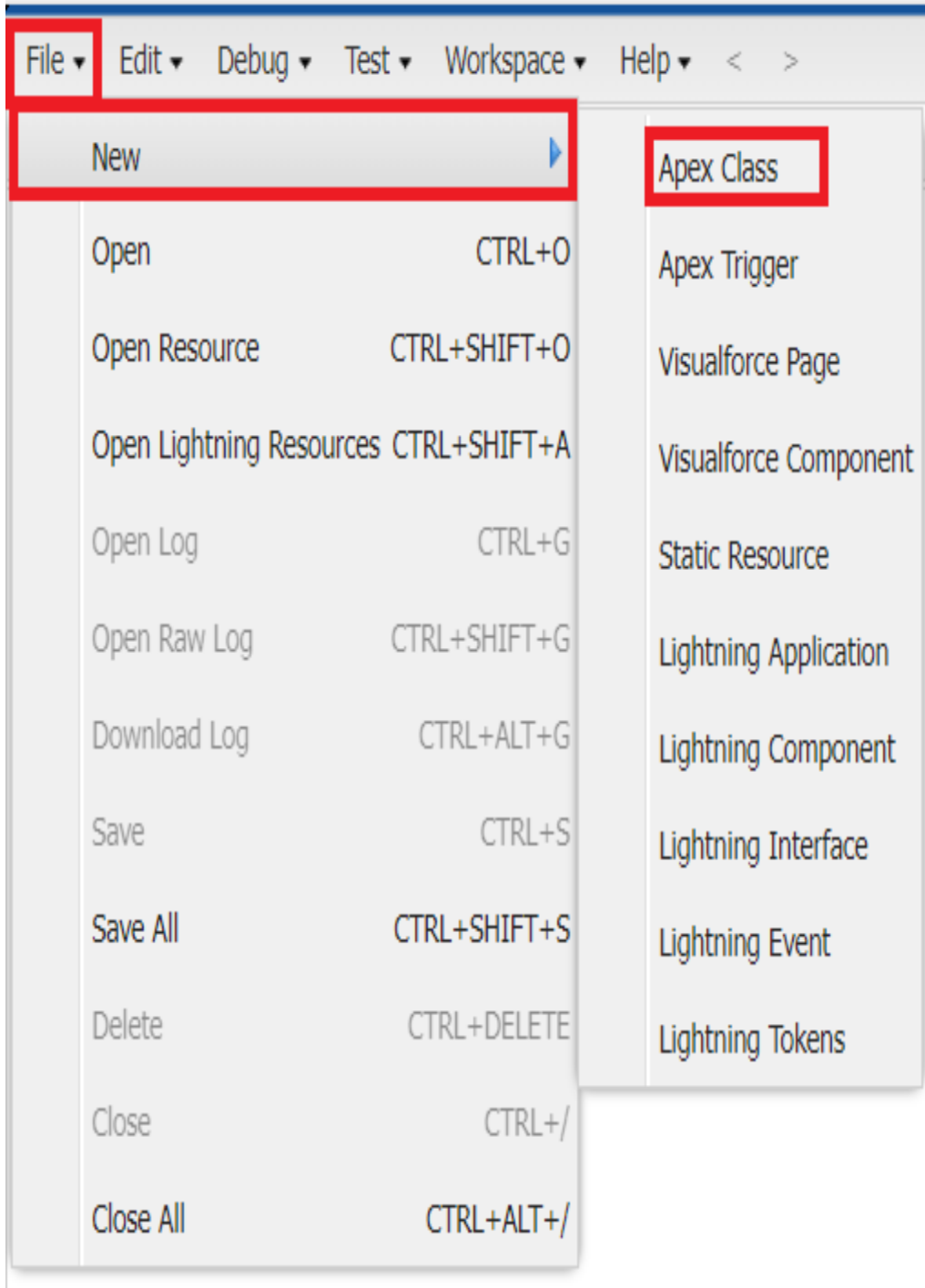
7. Savethecode.(clickonfile--> Save)

# Field Service Work Order Optimization

## ACTIVITY2: Create an Apex Trigger

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


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



2. Give the Apex Trigger name as "Work Order Trigger", and select "Work Order \_\_\_\_\_ c" from the dropdown for Object.




## Field Service Work Order Optimization

**New Apex Trigger** 

Name:

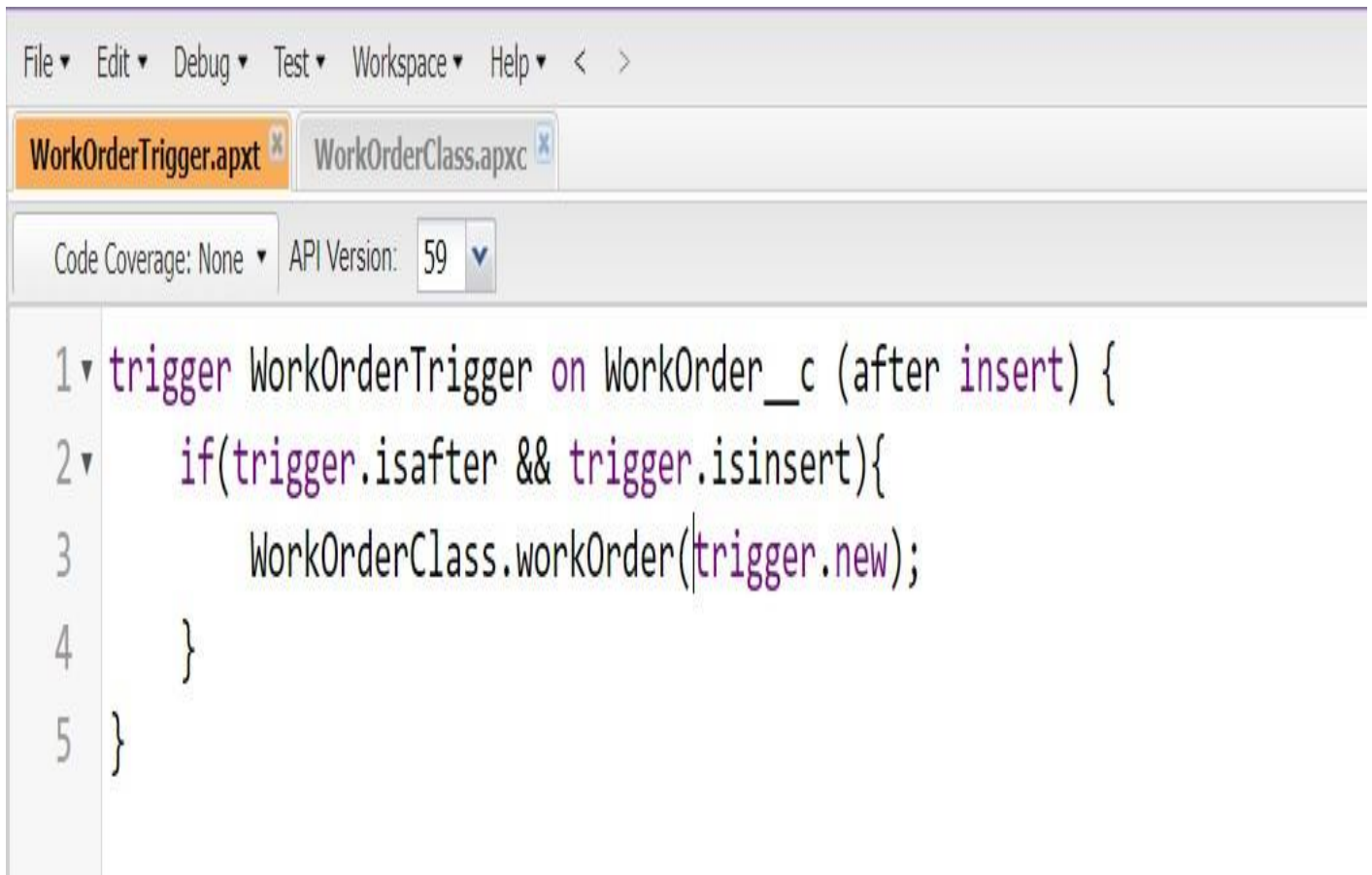
sObject:



Submit

3. Click Submit.
4. Now writethecodelogichere

# Field Service Work Order Optimization



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
WorkOrderTrigger.apxt x WorkOrderClass.apxc x
Code Coverage: None ▾ API Version: 59 ▾
1 ▾ trigger WorkOrderTrigger on WorkOrder__c (after insert) {
2 ▾     if(trigger.isafter && trigger.isinsert){
3         WorkOrderClass.workOrder(trigger.new);
4     }
5 }
```

## SourceCode:

```
trigger Work OrderTrigger on Work Order__c(afterinsert){
    if(trigger.isafter && trigger.isinsert){
        Work OrderClass.Work Order(trigger.new);
    }
}
```

5. Savethecode.(clickonfile-->Save)

# Field Service Work Order Optimization

## ACTIVITY3: Create an Apex Class

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

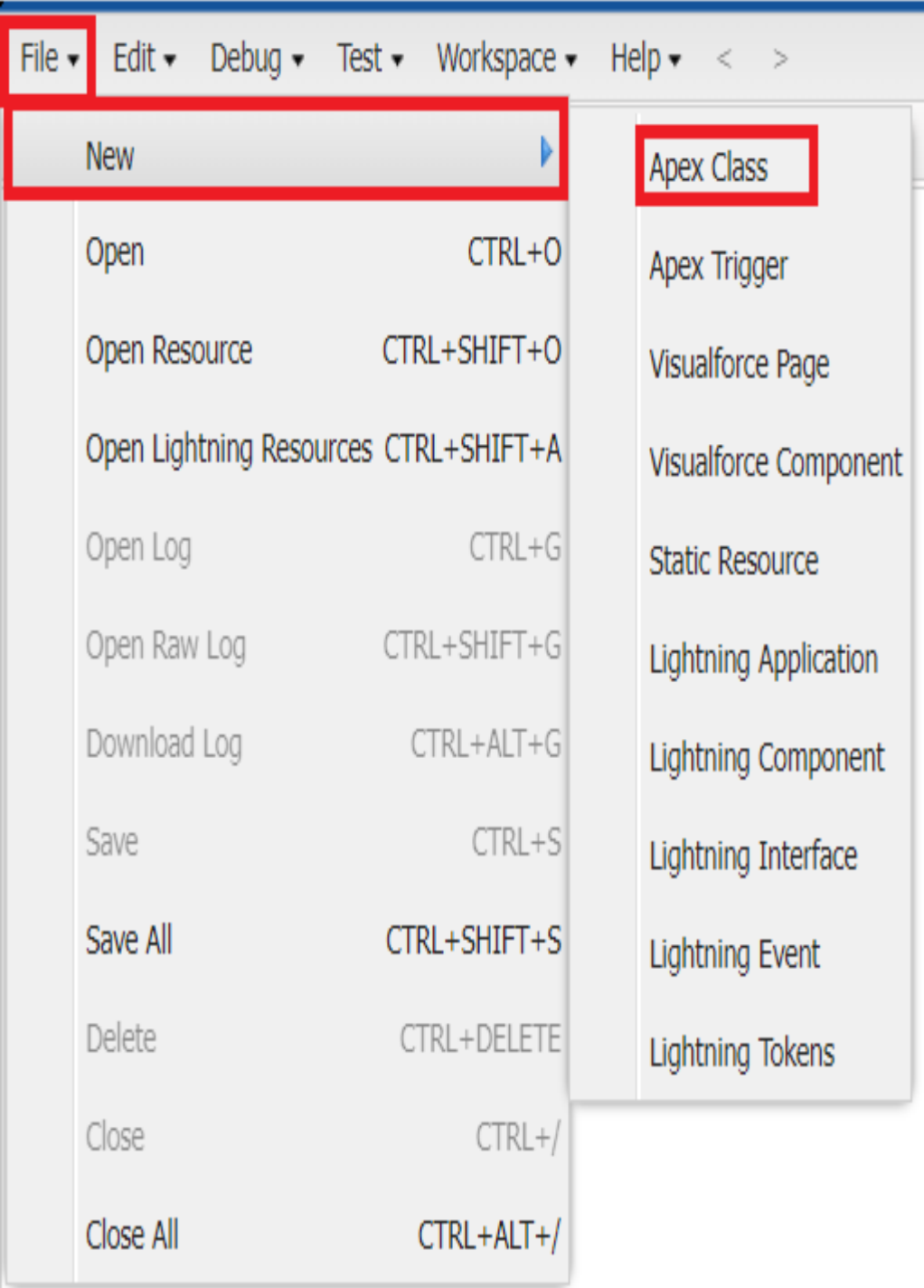


2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.

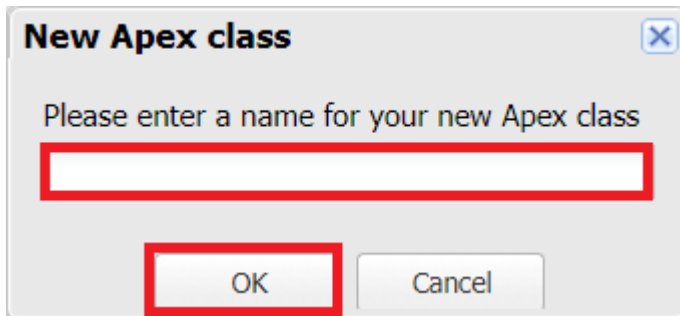
3. To create a new Apex Class follow the below steps: Click on the file --> New --> Apex Class.

4. Give the Apex Class name as "AssigningEmail".

# Field Service Work Order Optimization



# Field Service Work Order Optimization



4. Clickok.

5. Nowwritethecodelogichere

```
File • Edit • Debug • Test • Workspace • Help • < >
AssigningEmail.apxc
Code Coverage: None • API Version: 59
1 public class AssigningEmail {
2     public static void sendEmailmsg(List<Assignment__c> assRec){
3         List<messaging.SingleEmailMessage> myVar = new List<messaging.SingleEmailMessage>();
4         Map<Id,Technician__c> technicians = new Map<Id,Technician__c>([SELECT Id, Phone__c, Location__c, Skills__c, Name__c, Email__c, Availability__c, Name FROM Technician__c]);
5         try{
6             for(Assignment__c con : assRec){
7                 if(con.Technician_ID__c != null){
8                     messaging.SingleEmailMessage mail = new messaging.SingleEmailMessage();
9                     List<String> sendTo = new List<String>();
10                    sendTo.add(technicians.Get(con.Technician_ID__c).Email__c);
11                    mail.setToAddresses(sendTo);
12                    string subject = ' email sub';
13                    mail.setSubject(subject);
14                    string body = 'email body ';
15                    mail.setHTMLbody(body);
16                    myVar.add(mail);
17                }
18            }
19            Messaging.sendEmail(myVar);
20        }
21        catch(exception e){
22            system.debug('Error -----> ' + e.getMessage());
23        }
24    }
25 }
26 }
```

# Field Service Work Order Optimization

## SourceCode:

```
public class AssigningEmail {
    public static void sendEmailmsg(List<Assignmentc> assRec) {
        List<messaging.SingleEmailMessage> myVar = new List<messaging.SingleEmailMessage>();
        Map<id, Technicianc> technicians = new Map<id, Technicianc>([SELECT Id, Phonec, Locationc, Skillsc, Namec, Emailc, Availabilityc, Name FROM Technicianc]);
        try {
            for (Assignmentc con : assRec) {
                if (con.Technician_IDc != null) {
                    messaging.SingleEmailMessage mail = new messaging.SingleEmailMessage();
                    List<String> sendTo = new List<String>();
                    sendTo.add(technicians.Get(con.Technician_IDc).Emailc);
                    mail.setToAddresses(sendTo);
                    string subject = 'Work Order Assignment';
                    mail.setSubject(subject);
                    string body = 'The following Work Order has been assigned to you';
                    mail.setHTMLbody(body);
                    myVar.add(mail);
                }
            }
            Messaging.sendEmail(myVar);
        } catch (Exception e) {
            system.debug('Error >' + e.getMessage());
        }
    }
}
```

## SourceCode:

```
public class AssigningEmail {
    public static void sendEmailmsg(List<Assignmentc> assRec) {
        List<messaging.SingleEmailMessage> myVar = new List<messaging.SingleEmailMessage>();
        Map<id, Technicianc> technicians = new Map<id, Technicianc>([SELECT Id, Phonec, Locationc, Skillsc, Namec, Emailc, Availabilityc, Name FROM Technicianc]);
        try {
```

# Field Service Work Order Optimization

```
for(Assignment con :
    assRec){
    if(con.Technician_IDc!=null){
        messaging.SingleEmailMessage mail=new messaging.SingleEmailMessage();
        List<String> sendTo = new List<String>();
        sendTo.add(tecnicos.Get(con.Technician_IDc).Emailc);
        mail.setToAddresses(sendTo);
        string subject='Work Order Assignment';
        mail.setSubject(subject);
        string body='The following Work Order has been assigned to you'; mail.setHTMLbody(body);
        myVar.add(mail);
    }
}
Messaging.sendEmail(myvar);
}
catch(exception e){
    system.debug('Error >'+ e.getMessage());
}
}
```

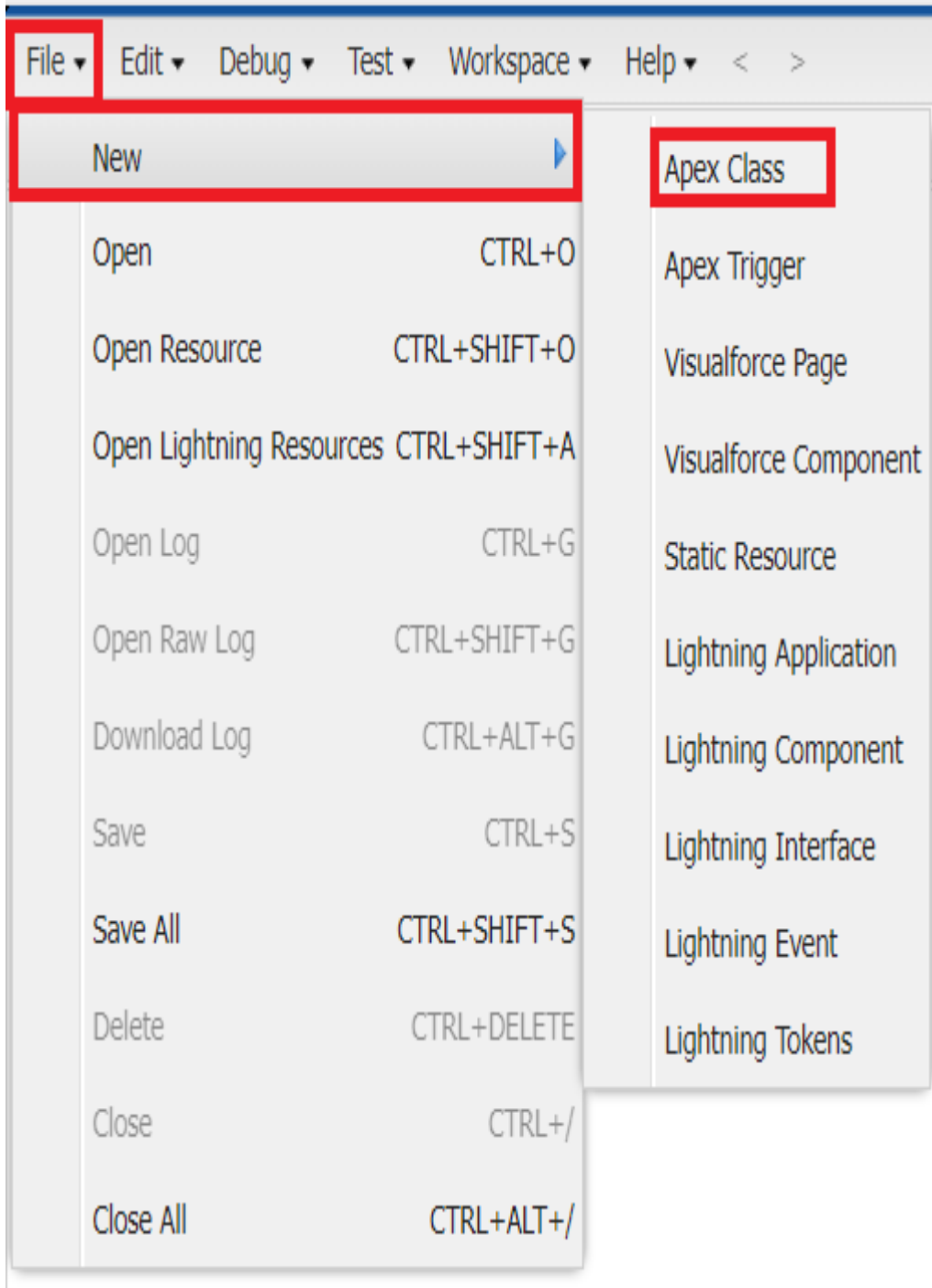
6. Save the code. (click on file--> Save)

# Field Service Work Order Optimization

## ACTIVITY 4: 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 "AssignmentTrigger", and select "Assignment\_\_c" from the dropdown for sObject.




## Field Service Work Order Optimization

**New Apex Trigger** 

Name:

sObject:



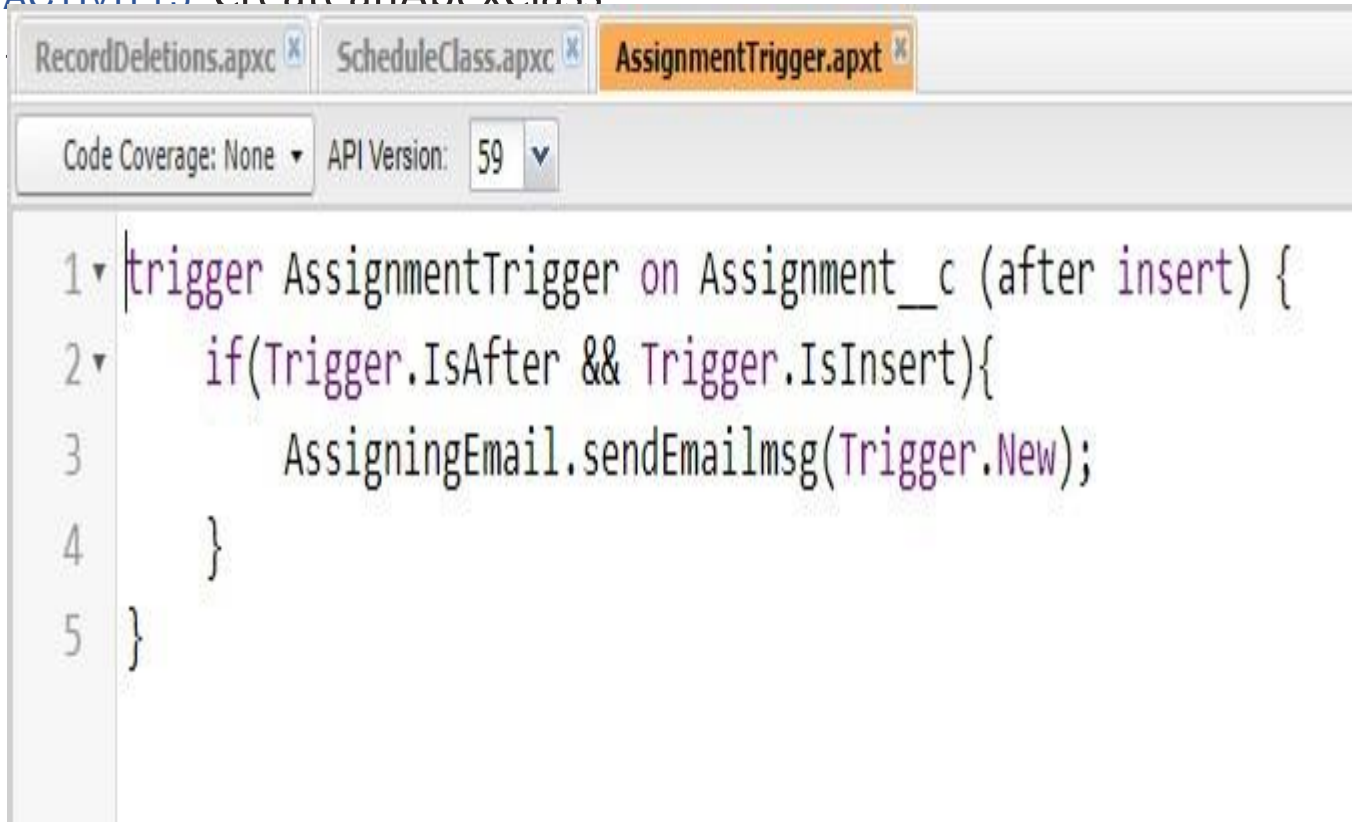
Submit

3. Click Submit.

4. Now write the code logic here

# Field Service Work Order Optimization

## ACTIVITY 5: Create an Apex Class



The screenshot shows the Salesforce IDE with three tabs: RecordDeletions.apxc, ScheduleClass.apxc, and AssignmentTrigger.apxt (which is the active tab). Below the tabs, there is a toolbar with 'Code Coverage: None' and 'API Version: 59'. The main editor area displays the following Apex code:

```
1 trigger AssignmentTrigger on Assignment__c (after insert) {  
2     if (Trigger.IsAfter && Trigger.IsInsert) {  
3         AssigningEmail.sendEmailmsg(Trigger.New);  
4     }  
5 }
```

### Source Code:

```
trigger    AssignmentTrigger    on    Assignment  
_____  
c(afterinsert){  
    if(Trigger.IsAfter && Trigger.IsInsert){  
        AssigningEmail.sendEmailmsg(Trigger.New);  
    }  
}
```

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

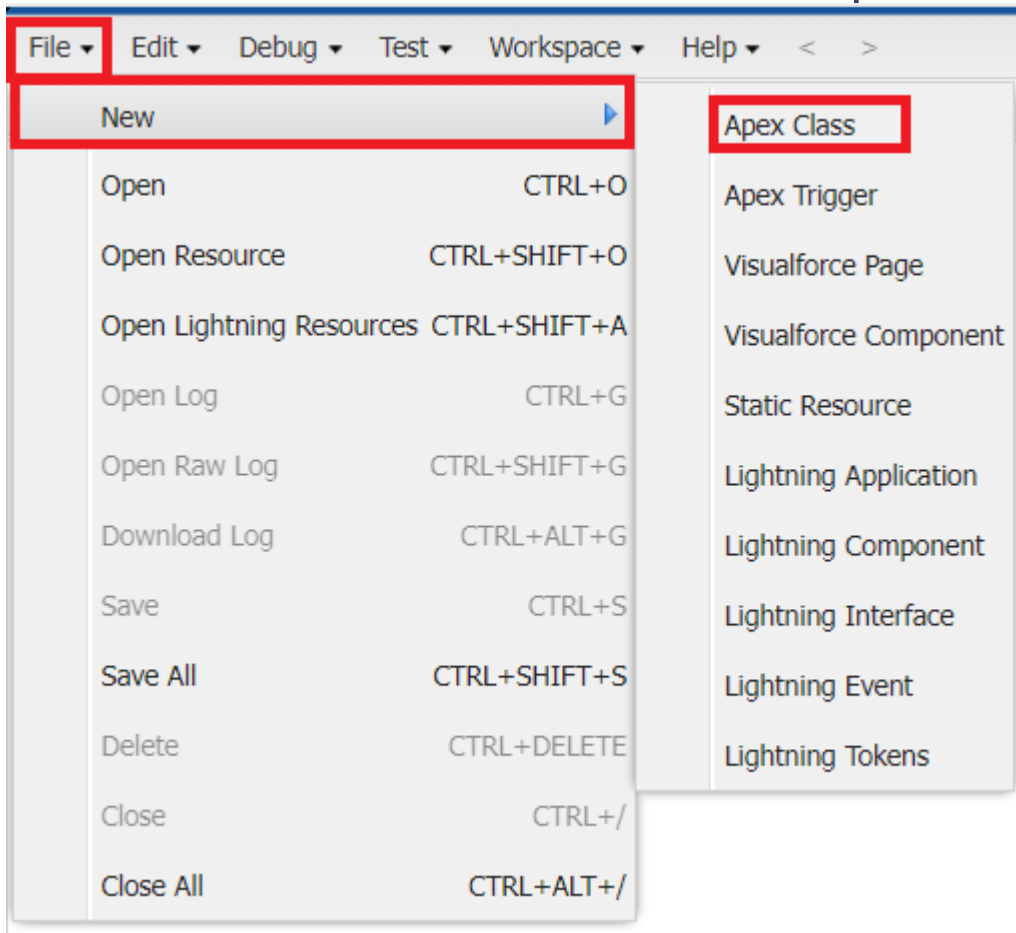
# Field Service Work Order Optimization



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

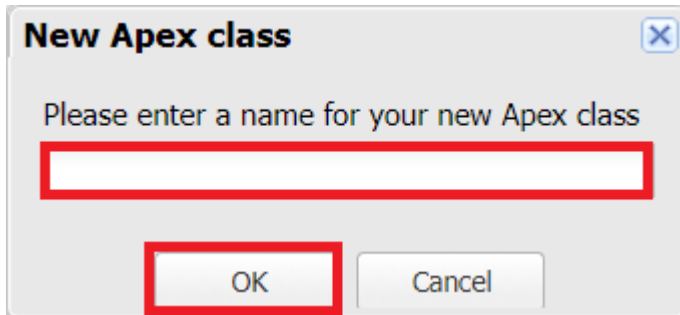
3. To create a new Apex Class follow the below steps: Click on the file --> New --> Apex Class.

# Field Service Work Order Optimization



4. Give the Apex Class name as “CompletionMail”.

# Field Service Work Order Optimization



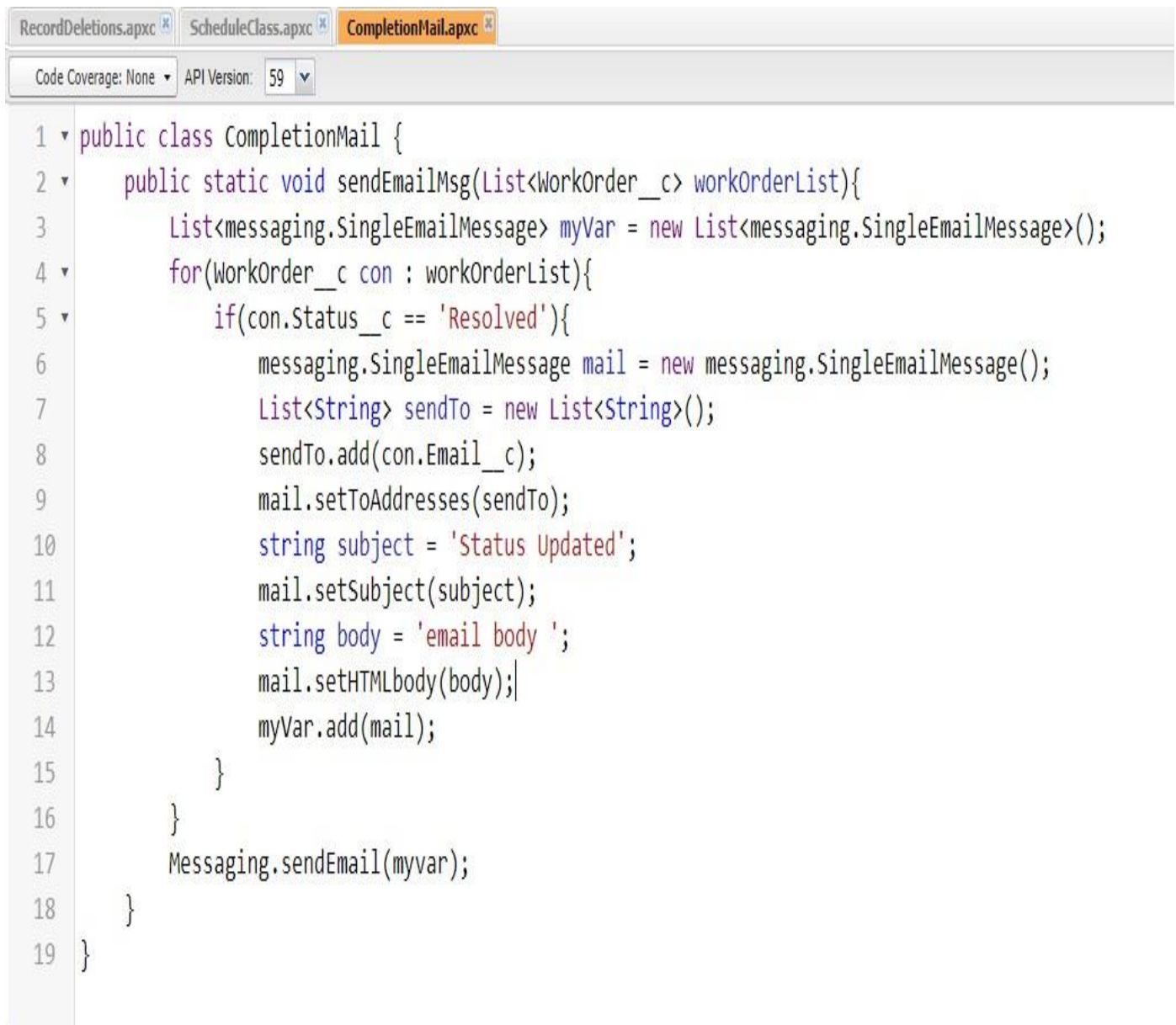
**New Apex class**

Please enter a name for your new Apex class

OK Cancel

5. Clickok.

6. Nowwritethecode logic here



```
1 public class CompletionMail {
2     public static void sendEmailMsg(List<WorkOrder__c> workOrderList){
3         List<messaging.SingleEmailMessage> myVar = new List<messaging.SingleEmailMessage>();
4         for(WorkOrder__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 }
```

# Field Service Work Order Optimization

## SourceCode:

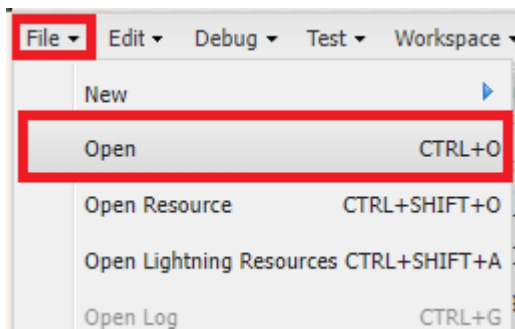
```
public class CompletionMail {
    public static void sendEmailMsg(List<Work Order__c> Work
        OrderList) { List<messaging.SingleEmailMessage> myVar = new
        List<messaging.SingleEmailMessage>();
        for (Work Order__c con : Work
            OrderList) {
            if (con.Status__c == 'Resolved') {
                messaging.SingleEmailMessage mail = new messaging.SingleEmailMessage();
                List<String> sendTo = new List<String>();
                sendTo.add(con.Email__c);
                mail.setToAddresses(sendTo);
                String subject = 'StatusUpdated';
                mail.setSubject(subject);
                String body = 'emailbody';
                mail.setHTMLbody(body);
                ; myVar.add(mail);
            }
        }
        Messaging.sendEmail(myVar);
    }
}
```

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

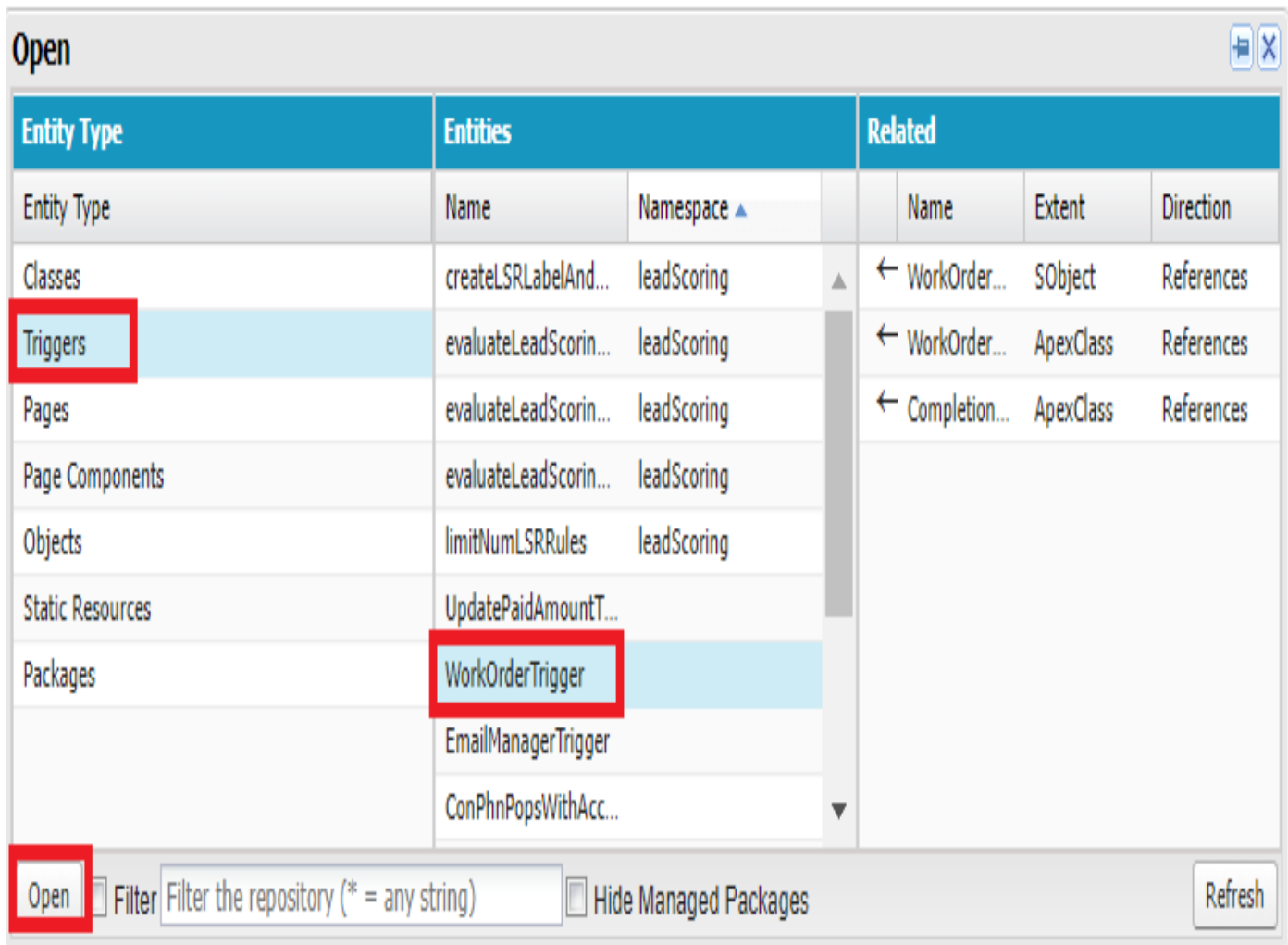
# Field Service Work Order Optimization

## ACTIVITY 6: Create an Apex Trigger

1. Click on the file --> Open.



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



# Field Service Work Order Optimization

3. Now writethecode logic here.



```
RecordDeletions.apxc x ScheduleClass.apxc x CompletionMail.apxc x WorkOrderTrigger.apxt x
Code Coverage: None v API Version: 59 v
1 trigger WorkOrderTrigger on WorkOrder__c (after insert, after update) {
2     if(Trigger.IsAfter && Trigger.IsInsert){
3         WorkOrderClass.workOrder(trigger.new);
4     }
5     if(Trigger.IsAfter && Trigger.IsUpdate){
6         CompletionMail.sendEmailMsg(Trigger.New);
7     }
8 }
```



# Field Service Work Order Optimization

```
Work OrderClass.Work Order(trigger.new);  
}  
if(trigger.IsAfter      &&      Trigger.IsUpdate){  
    CompletionMail.sendEmailMsg(trigger.New);  
}  
}
```

4. Savethecode.(clickonfile-->Save)

## ACTIVITY7:CreateanAsynchronousApexClass

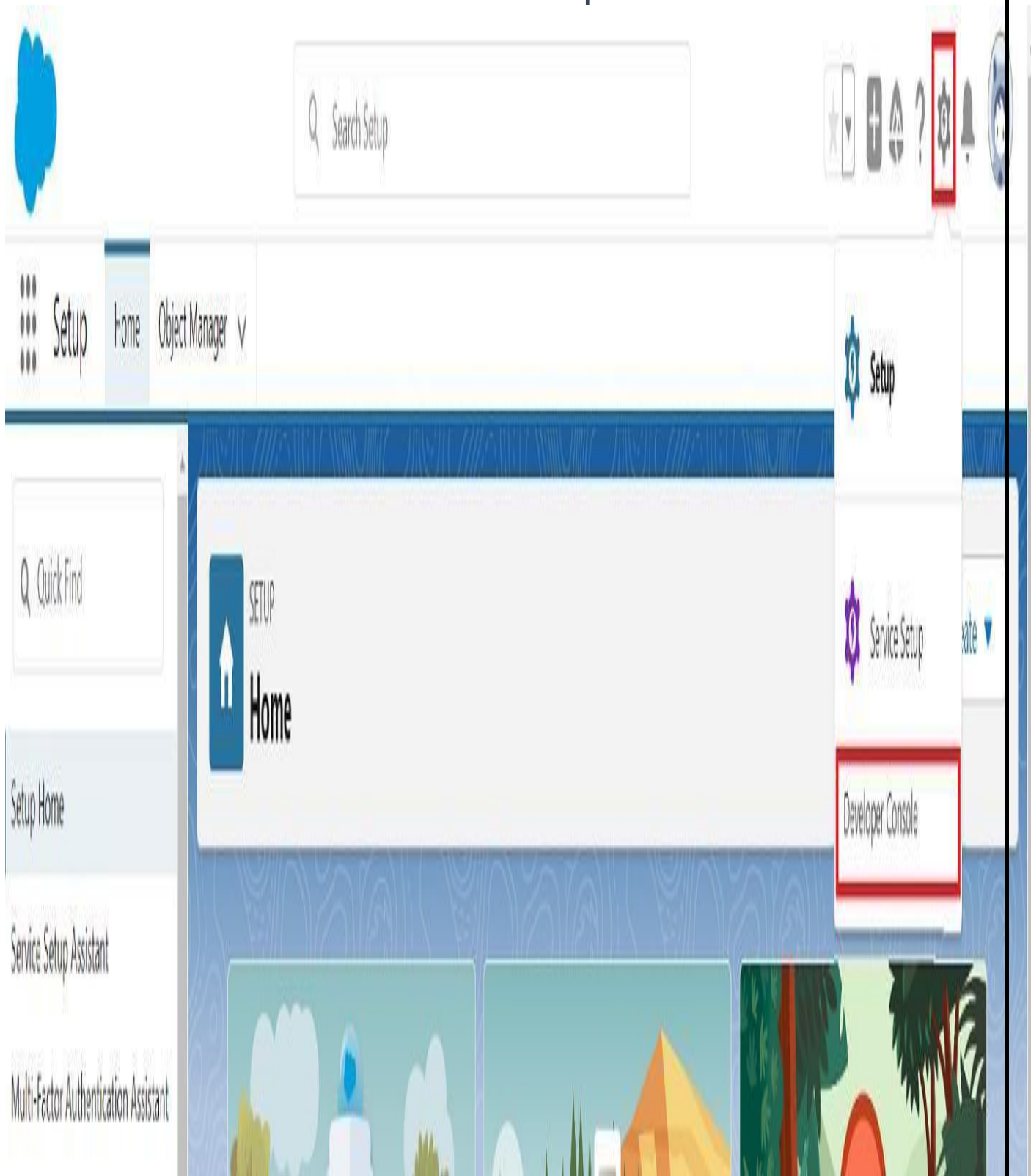
CreateanApexClasstoDeletealltheWork OrderrecordswhichmeetsthefollowingcriteriaL

1. Completeddateshouldbemorethan30days.
2. Statusshouldbe‘Resolved’.

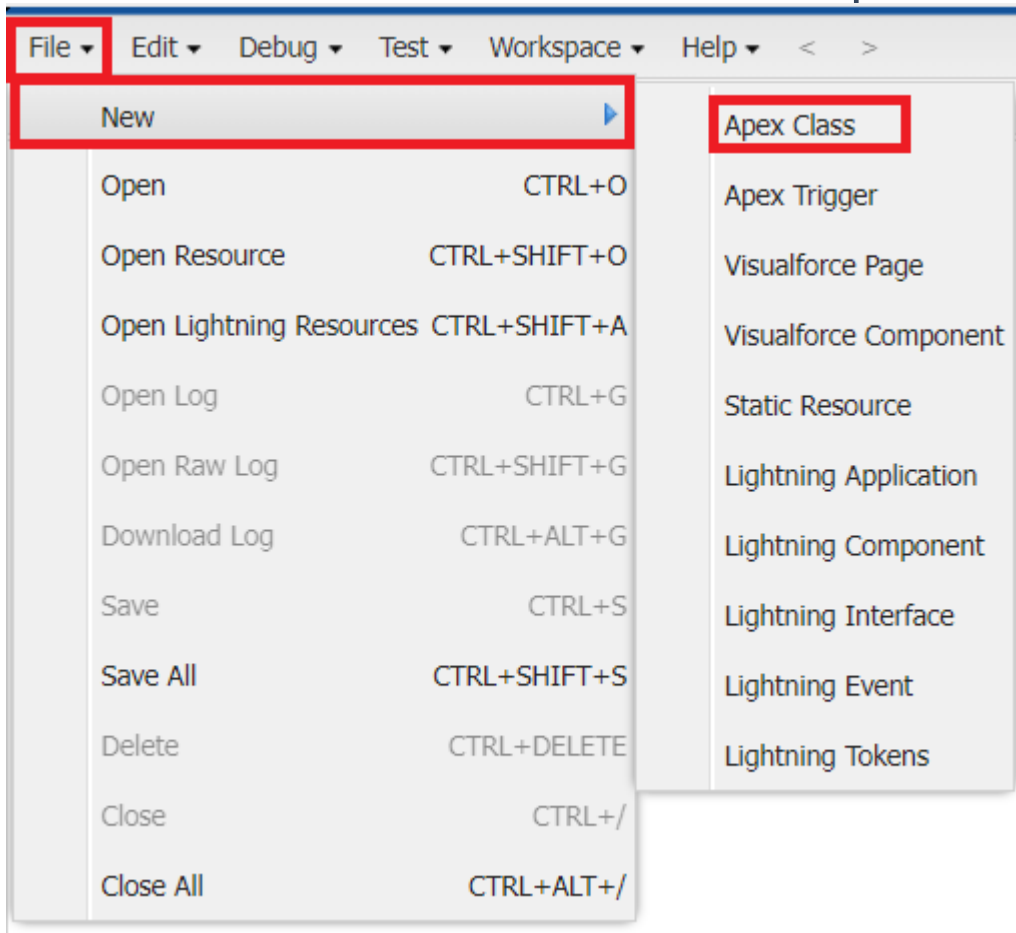
## CreateanApex Class

1. GotoSetup -->Clickonthegearicon-->SelectDeveloperConsole.

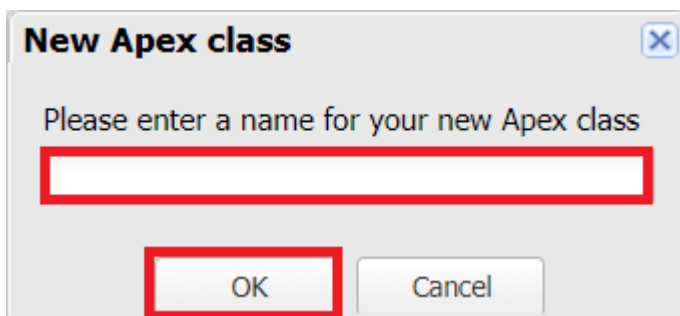
# Field Service Work Order Optimization



# Field Service Work Order Optimization



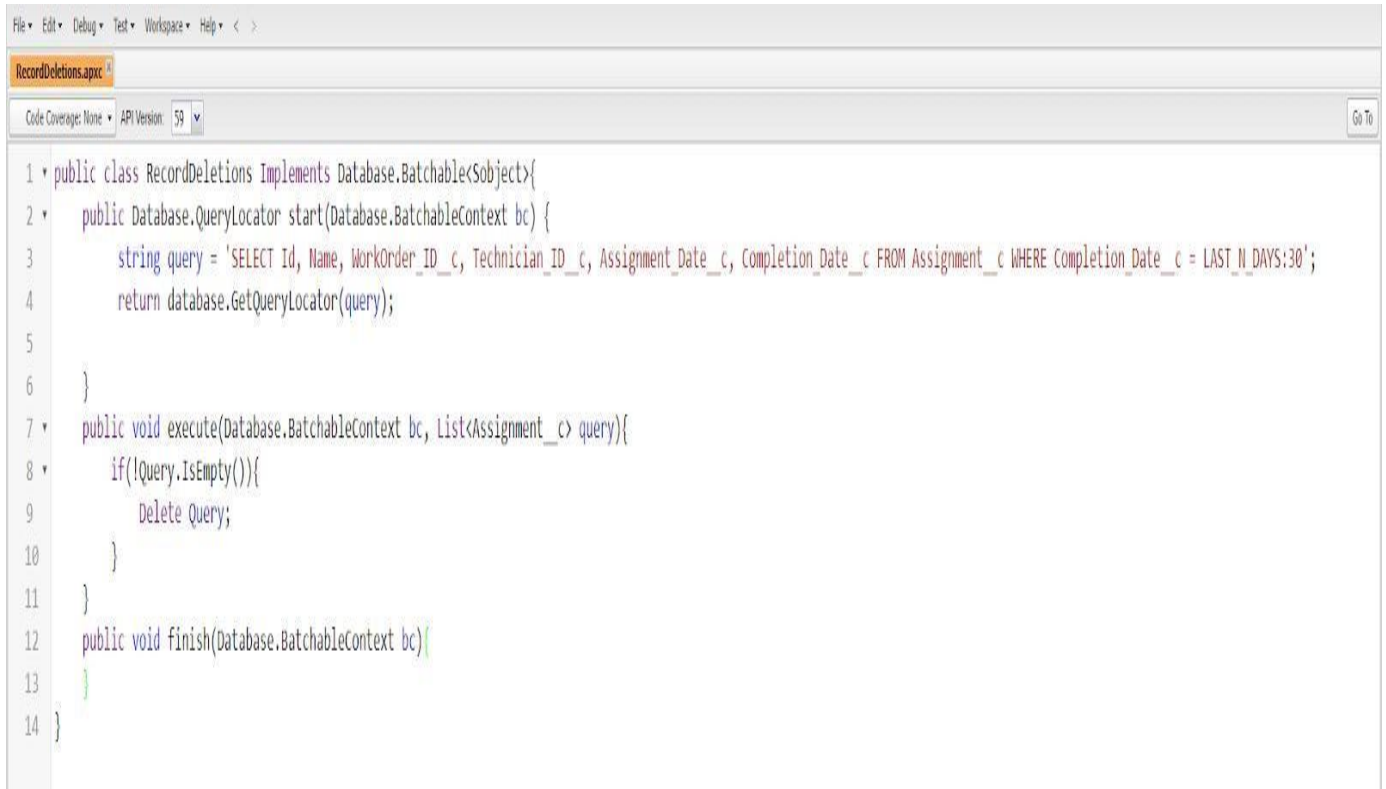
4. Give the Apex Class name as “RecordDeletion”.



5. Click ok.

6. Now write the code logic here

# Field Service Work Order Optimization



The screenshot shows a code editor window for a file named `RecordDeletions.apxc`. The editor has a menu bar with `File`, `Edit`, `Debug`, `Test`, `Workspace`, and `Help`. Below the menu bar, there is a toolbar with `Code Coverage: None`, `API Version: 59`, and a `Go To` button. The code is written in Apex and is as follows:

```
1 public class RecordDeletions implements Database.Batchable<Sobject>{
2     public Database.QueryLocator start(Database.BatchableContext bc) {
3         string query = 'SELECT Id, Name, WorkOrder_ID__c, Technician_ID__c, Assignment_Date__c, Completion_Date__c FROM Assignment__c WHERE Completion_Date__c = LAST_N_DAYS:30';
4         return database.GetQueryLocator(query);
5     }
6 }
7 public void execute(Database.BatchableContext bc, List<Assignment__c> query){
8     if(!query.isEmpty()){
9         Delete query;
10    }
11 }
12 public void finish(Database.BatchableContext bc){
13 }
14 }
```

# Field Service Work Order Optimization

## Source Code:

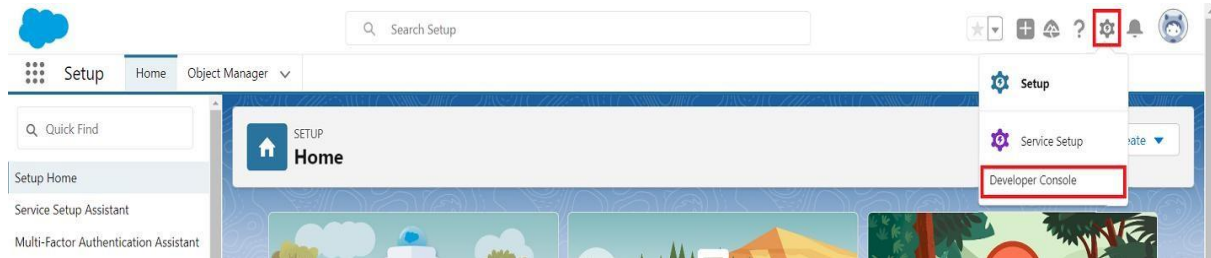
```
public class RecordDeletionsImplementsDatabase.Batchable<Sobject>{
    public Database.QueryLocator start(Database.BatchableContext bc) {
        string query = 'SELECT Id, Name, Work Order_ID____c,
        Technician_ID____c, Assignment_Date__c, Completion_Date__c FROM
        Assignment____c WHERE Completion_Date__c =
        LAST_N_DAYS:30';
        return database.GetQueryLocator(query);
    }
    public void execute(Database.BatchableContext bc, List<Assignment
    _____c>query){
        if(!Query.IsEmpty()){
            DeleteQuery;
        }
    }
    public void finish(Database.BatchableContext bc){
    }
}
```

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

# Field Service Work Order Optimization

## ACTIVITY8: Create an Apex Schedule Class

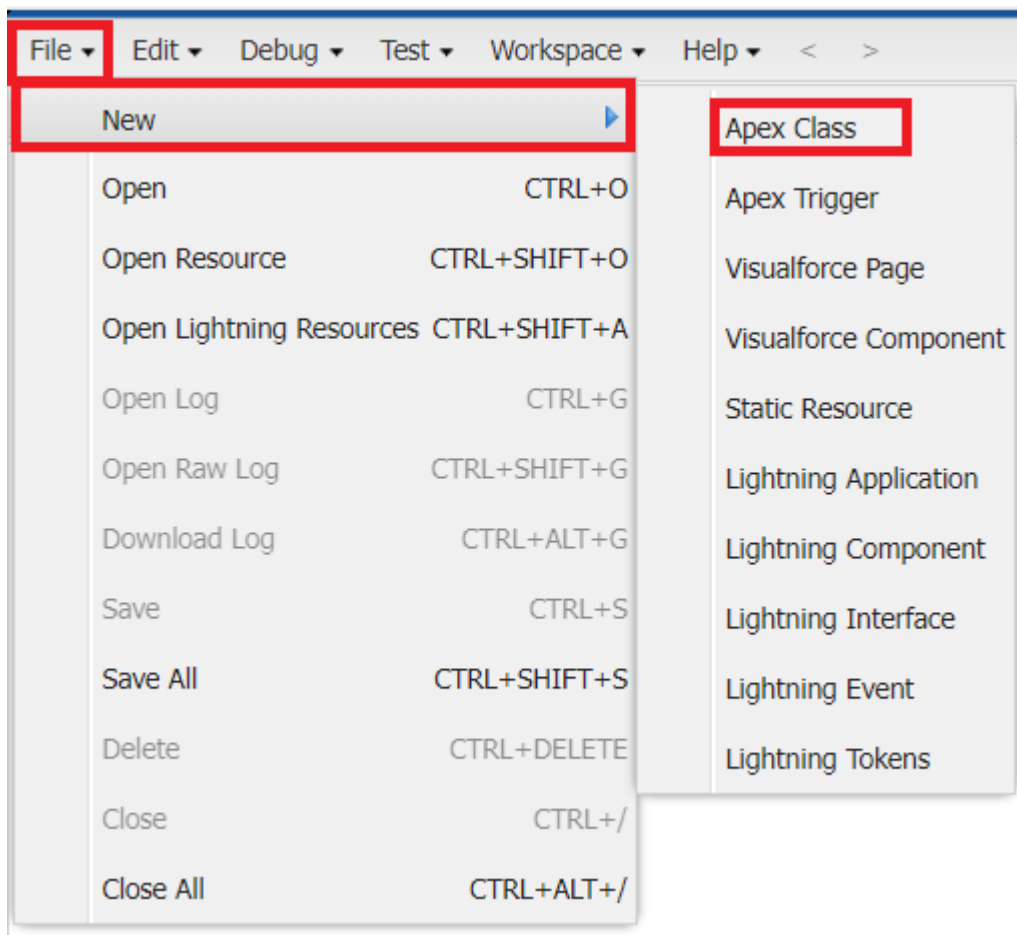
1. Goto Setup-->Click on the gear icon-->Select Developer Console.



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

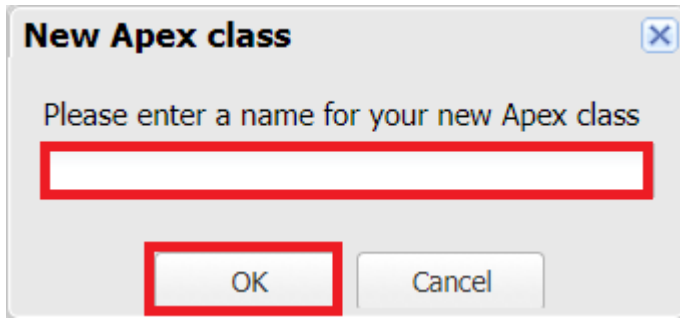
3. To create a new Apex Class follow the below steps:

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



4. Give the Apex Class name as "ScheduleClass".

## Field Service Work Order Optimization



**New Apex class** ✕

Please enter a name for your new Apex class

**OK** Cancel

5. Click OK.

6. Now write the code logic here

## Field Service Work Order Optimization



```
RecordDeletions.apxc x ScheduleClass.apxt x
Code Coverage: None API Version: 59
1 global class ScheduleClass implements Schedulable {
2     global void execute(SchedulableContext SC) {
3         RecordDeletions delrec = new RecordDeletions();
4         database.executeBatch(delrec, 200);
5     }
6 }
```

### SourceCode:

```
globalclassScheduleClassimplementsSchedulable{
    global void execute(SchedulableContext SC) {
        RecordDeletionsdelrec=newRecordDeletions();
        database.executeBatch(delrec, 200);
    }
}
```



# Field Service Work Order Optimization

}

7. Savethecode.(clickonfile?Save)

# Field Service Work Order Optimization

## ACTIVITY9:CreateaScheduleApex

1. ScheduletheApexclass:
2. FromtheSetuppagesearchfor“ApexClasses”inquick search.
3. Clickon“ScheduleApex”asshown below.

Search Setup

Setup Home Object Manager

apex class

Custom Code

Apex Classes

Apex Classes

Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Lightning Platform.

**Percent of Apex Used: 0.19%**  
You are currently using 11,223 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Estimate your organization's code coverage

Compile all classes

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Developer Console	New	Generate from WSDL	Run All Tests	Schedule Apex			
Edit   Del   Security	Apex101		59.0	Active	181	demo.project, 26/10/2023, 12:38 pm	

# Field Service Work Order Optimization

4. Click on Schedule Apex and enter the Job name.

- a. JobName: DeleteAssignmentSchedule
- b. ApexClass: ScheduleClass (from clicking on lookup icon)
- c. Frequency: Monthly
- d. PreferredStartTime: Select any time

SETUP  
Apex Classes

### Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Save Cancel

Job Name DeleteAssignmentSchedule

Apex Class ScheduleClass

Schedule Apex Execution

Frequency ☐ Weekly ☒ Monthly

On day 1 of every month ☐ On the 1st Sunday of every month

Start 06/12/2023 [ 06/12/2023 ]

End 06/01/2024 [ 06/12/2023 ]

Preferred Start Time 4:00 pm

Exact start time will depend on job queue activity.

Save Cancel

5. Click Save.

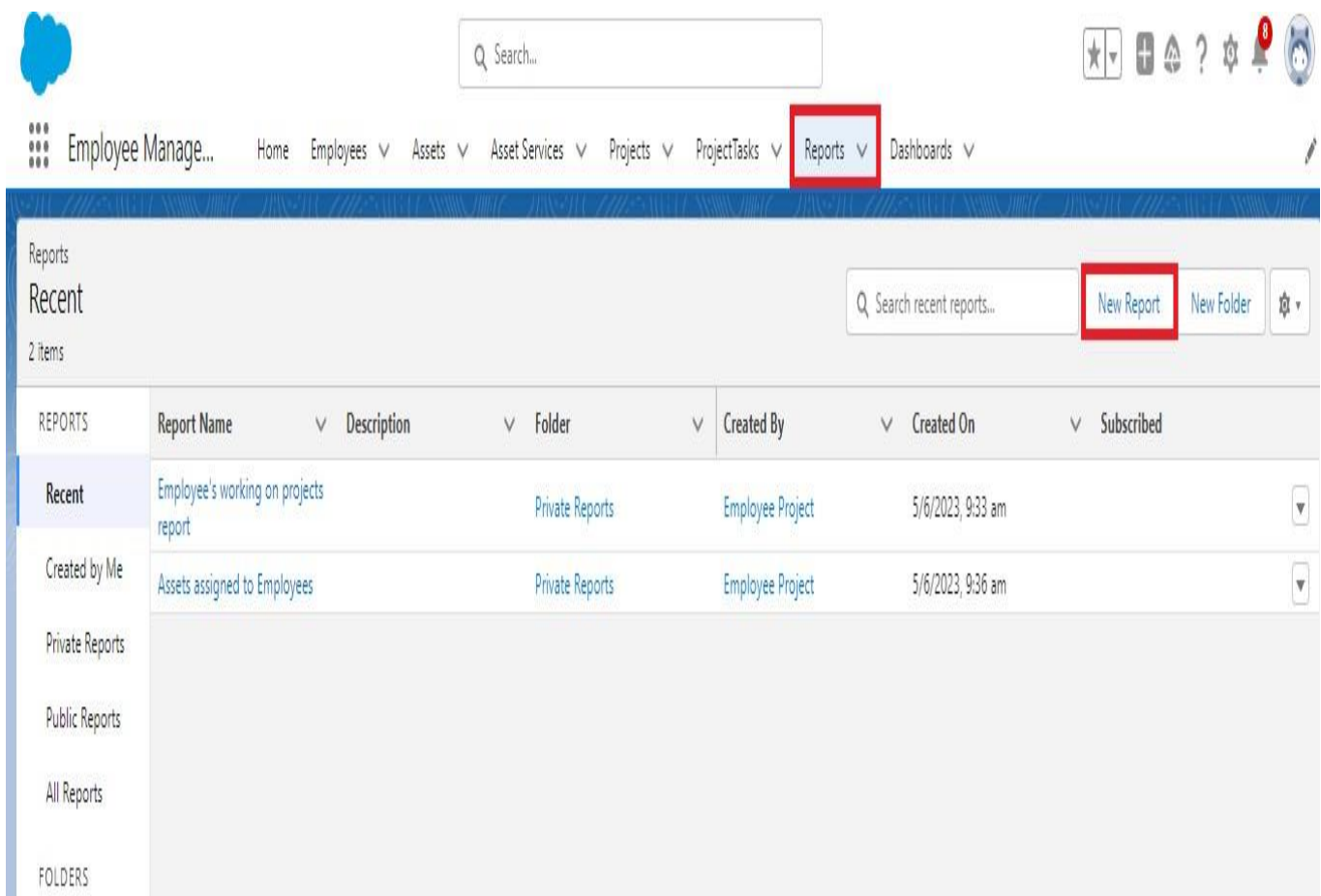
# Field Service Work Order Optimization

## 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.

### ACTIVITY 1: Report

1. Go to the app --> click on the report tab
2. Click New Report.



The screenshot shows the Salesforce Reports and Dashboards interface. The top navigation bar includes the Salesforce logo, a search bar, and several icons. The 'Reports' tab is highlighted in the top navigation bar. Below the navigation bar, the 'Recent' section is visible, showing a list of reports. The 'New Report' button is highlighted with a red box.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Employee's working on projects report		Private Reports	Employee Project	5/6/2023, 9:33 am	
Created by Me	Assets assigned to Employees		Private Reports	Employee Project	5/6/2023, 9:36 am	
Private Reports						
Public Reports						
All Reports						

3. Select report type from category or from report type panel or from search panel --> click on start report.

# Field Service Work Order Optimization

## Create Report

Category

Recently Used

All1

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

Select a Report Type

assignment2

Report Type Name	Category
Assignments	Standard
Assignments with WorkOrder ID3	Standard
Assignments with Technician ID	Standard

Details

Assignments with WorkOrder ID

Standard Report Type

4

Start Report

Details

Fields (32)

Created By You

No Reports Yet

Created By Others

No Reports Yet

Objects Used in Report Type

Owner

WorkOrder

# Field Service Work Order Optimization

4. Customize your report
- Add fields from left pane as shown below
  - Grouped by Work Order ID

The screenshot shows the 'Employee Management' interface. At the top, there's a navigation bar with 'Employee Manage...' and various dropdown menus: Home, Employees, Assets, Asset Services, Projects, Project Tasks, Reports, and Dashboards. Below this, the 'REPORT' section is active, showing 'New Employees Report' and 'Employees'. A red box highlights the 'Save & Run', 'Save', 'Close', and 'Run' buttons. Another red box highlights the 'Outline' and 'Filters' sections on the left sidebar. The 'Outline' section shows 'Groups' and 'Add group...'. The 'Filters' section shows 'Columns' and 'Add columns...'. The main table displays employee data with columns: Employee, Employee Name, Employee ID, Reports to, Login Time, Logout Time, Mode of Work, and LinkedIn Profile. The table contains two rows of data. The 'Add columns...' button in the sidebar is also highlighted with a red box.

Employee	Employee Name	Employee ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
1	Employee	4751000000000000					http://https://linkedin
2	Employee	4751000000000000		8:00 am	1:00 pm		http://https://linkedin

5. Save or run unit.

**Note:** Reports may get varied from the above pictures as the data might be different.

# Field Service Work Order Optimization

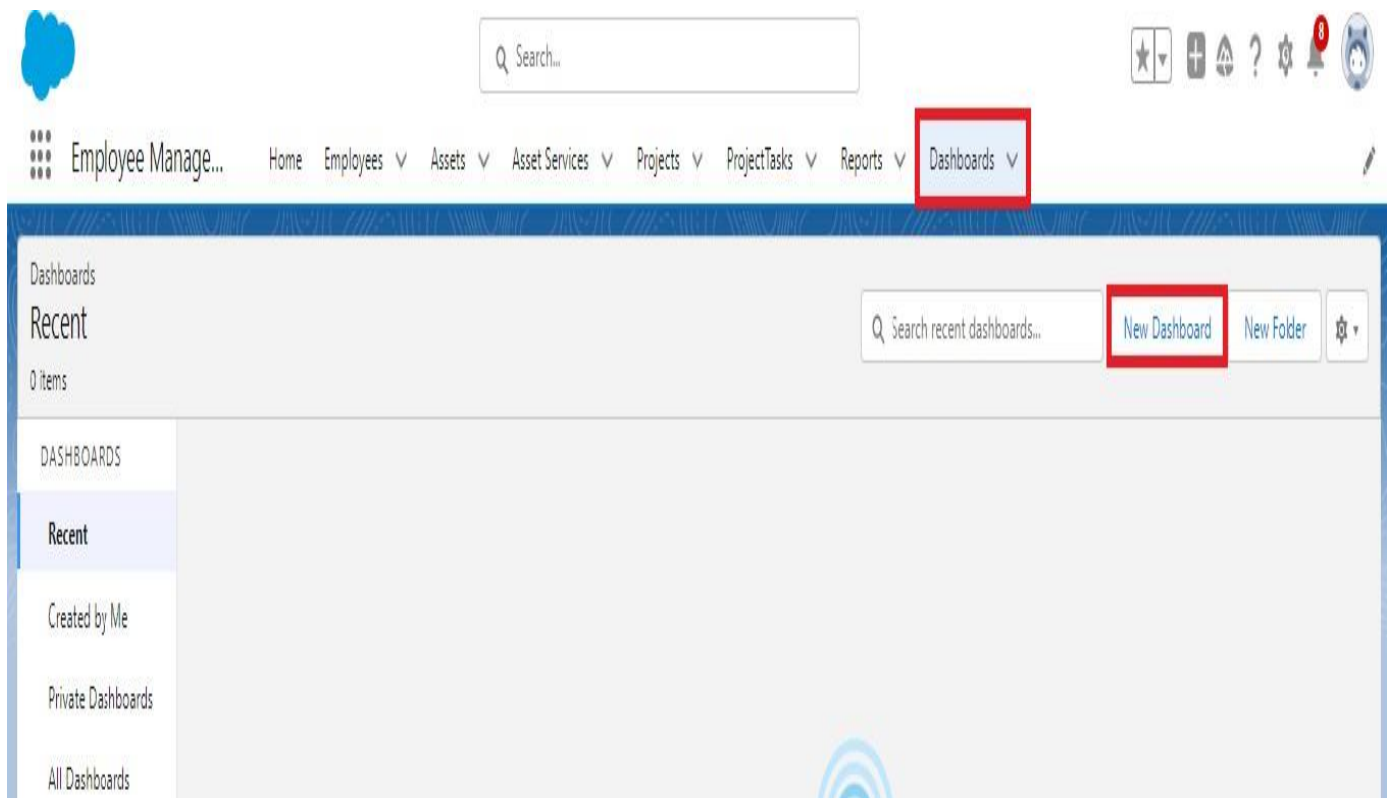
## ACTIVITY2:CreateReports

1. Createareportwithreporttype:“Work OrdersStatus Reports”.
2. Createareportwithreporttype:“TechnicianandAssignmentDetailsReports”.

# Field Service Work Order Optimization

## ACTIVITY3:Dashboard

1. Goto the app --> click on the Dashboard tabs.



2. Give a Name and click on Create.



# Field Service Work Order Optimization

## New Dashboard

\* Name

Dashboard 1

Description

Folder

Private Dashboards

Select Folder

Cancel

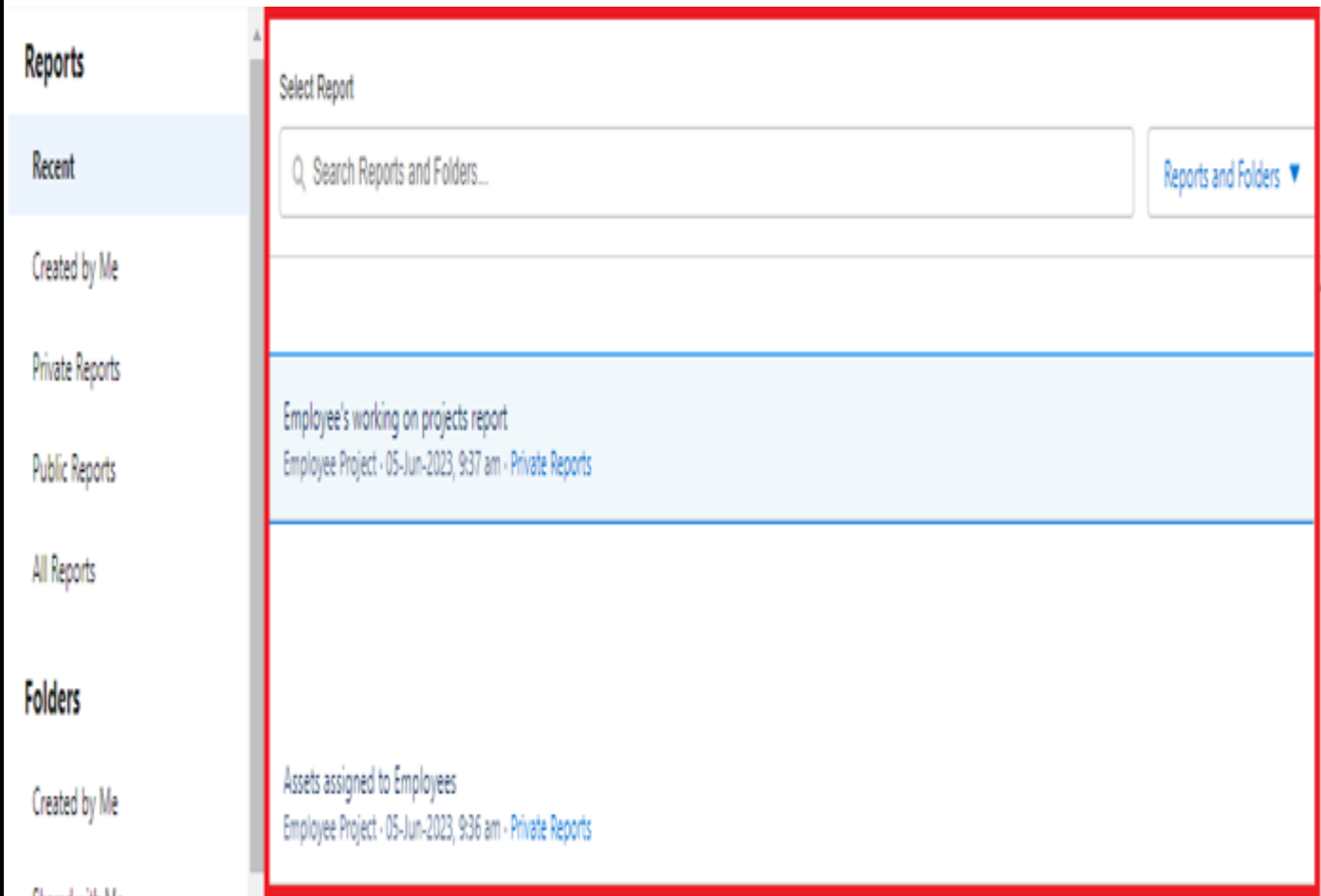
Create

3. Select add component.

The screenshot displays the dashboard interface. At the top, there is a navigation bar with a hamburger menu icon on the left and a pencil icon on the right. The navigation bar contains the following items: 'Employee Manage...', 'Home', 'Employees' (with a dropdown arrow), 'Assets' (with a dropdown arrow), 'Asset Services' (with a dropdown arrow), 'Projects' (with a dropdown arrow), 'Project Tasks' (with a dropdown arrow), 'Reports' (with a dropdown arrow), and 'Dashboards' (with a dropdown arrow). Below the navigation bar, there is a header section for 'Dashboard 1' with a pencil icon. To the right of the header, there is a red box highlighting the '+ Component' button. Next to it are buttons for '+ Filter', a star icon, 'Save', and 'Done'. Below the header, there is a grid of 12 placeholder components arranged in two rows of six.

# Field Service Work Order Optimization

4 Select a Report which we have created in the previous activities and click on select



6. Click Add then click on Save and then click on Done.

## ACTIVITY 4: Create Dashboards

Create another Dashboard as we discussed in activity 3 which shows the details of completed Work Order status in a vertical bar graph.