

Dynamic Flex Service Scheduler for Managing Site-Based Service Requests

Introduction

The Flex Service with dynamic UI empowered the client's staff to efficiently manage services per site from a single interface. This led to:

- Faster quote finalization
- More accurate service scheduling
- Improved user satisfaction and operational agility

Client Overview

Industry: Utility and Environmental Services

Salesforce Products Used

Salesforce
Lightning
Experience

Lightning Web
Components
(LWC)

Apex

SOQL

Custom
Metadata
Custom Labels

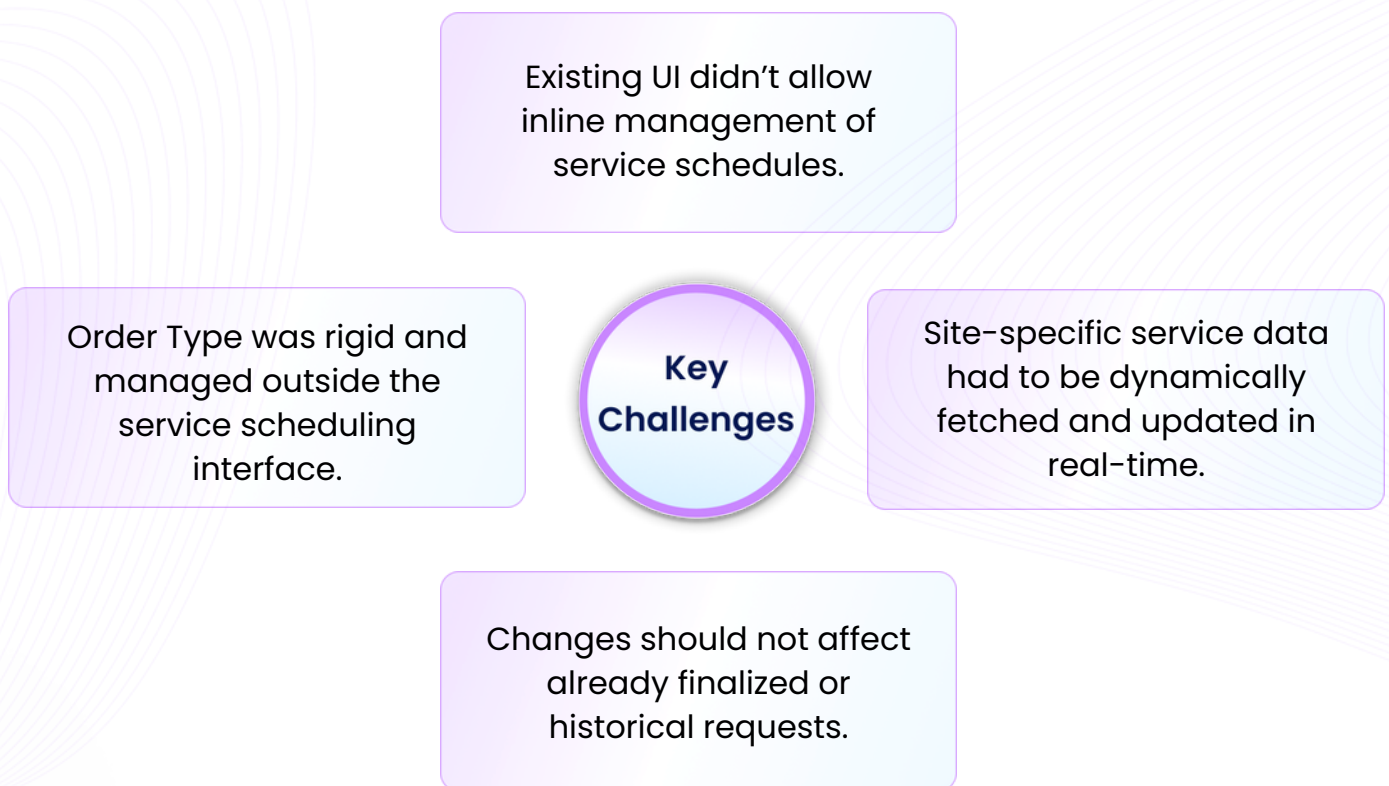
Standard &
Custom
Objects

Business Requirements

The client needed to enhance operational flexibility for managing service requests linked to Quote records. The key requirement was:

- To design a dynamic UI that:
 - Displays existing service request summary with site address
 - Allows users to:
 - Create new service requests
 - Modify existing service requests
 - Delete service requests
 - Change Order Type

Challenges Faced



Flexible Service Management Interface

Custom Entry Point

- A dedicated action button was added to the Quote interface, allowing users to launch an interactive service management panel. This panel could open as a modal or a full-screen view, depending on the user context.

Service Overview Display

- Upon initialization, the interface retrieved all service records associated with the current quote. These were grouped logically by service location and presented in an expandable, nested layout — enabling users to view and manage services by site.

Service Lifecycle Capabilities

- Create: Users could initiate new service requests via an inline form triggered by an “Add” action.
- Modify: Editable fields within the UI enabled updates to key service details such as start/end dates, service frequency, and product selection.
- Delete: Both draft and saved entries could be removed with user confirmation, ensuring controlled data management.

Support for Multiple Order Types

- Each service entry included a selectable order type, defaulting to “One-Time.”
 - For One-Time services, validations ensured the duration remained within acceptable limits (e.g., not exceeding 31 days).
 - For Recurring services, configurable scheduling options (e.g., daily, weekly) were provided, enabling flexible service planning.

Backend Integration

- All create, update, and delete operations were managed through custom server-side logic to ensure data integrity and scalability.

UX Design Highlights

- Accordion View by Site
- Dynamic form rows for product selection
- Toggle switch or dropdown for Order Type
- Success/Error toast notifications for user feedback
- Disabled fields for already completed orders

Business Outcome

Business Goals

Manage service requests per site
Real-time add/edit/delete
Visual clarity for service summary
Improve scheduling efficiency
Order type flexibility

Outcome Achieved

Grouped UI by site address
LWC enabled full CRUD operations
Accordion + table layout
No need to switch between screens
Order type can be changed per service



 zingworks.co |  info@zingworks.co



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