TEAM 15

CLICKED ADMIN SPRINT PROJECT

THE TEAM

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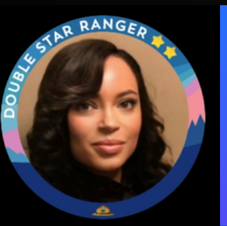

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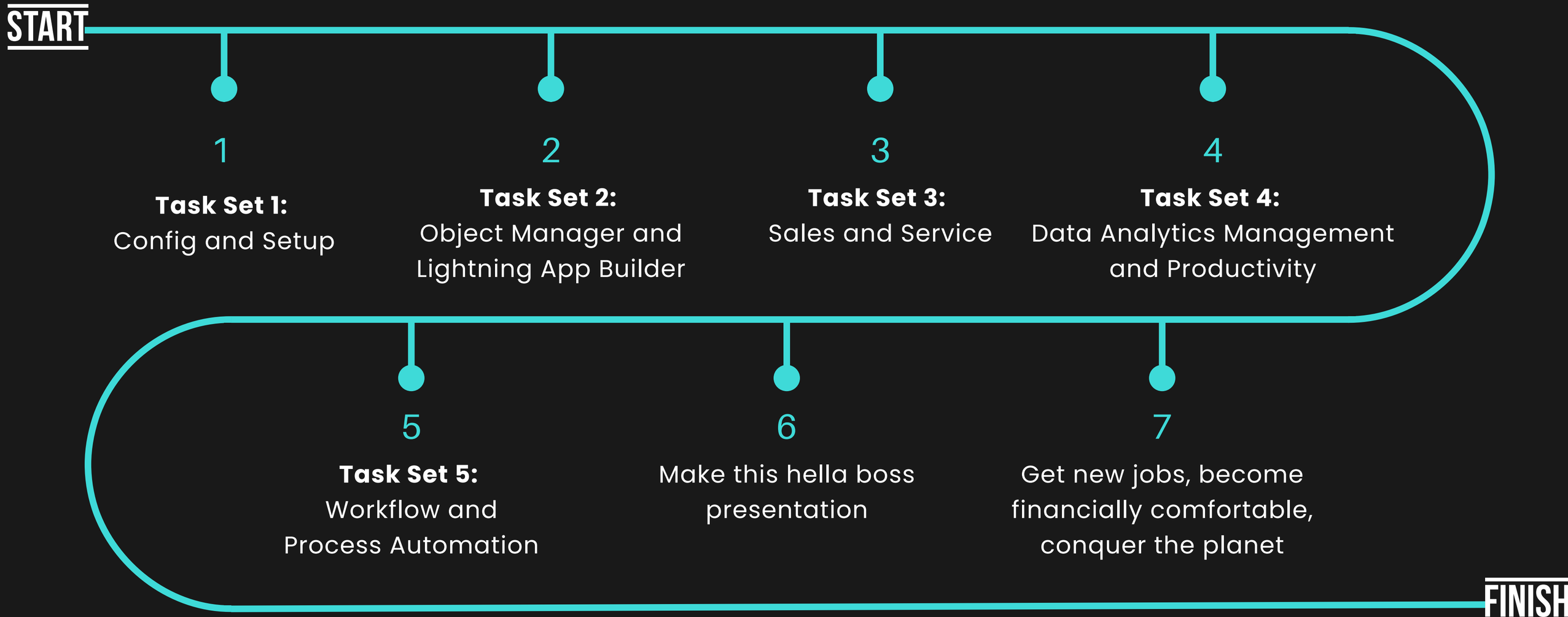
Project Elements

Clicked Admin Sprint Sections and Objectives



Task Set 1
Config and Setup

You have received this set of instructions from a team member. Use the information garnered from your user stories and BPMs to complete the following tasks. Feel free to fill in gaps in information as needed to complete these objectives.

TASK 1-A

Directive

Create a **report of Leads grouped by Lead Status** and analyze the report to identify the most common lead status. Discuss how this information can be used for sales strategy

Implementation

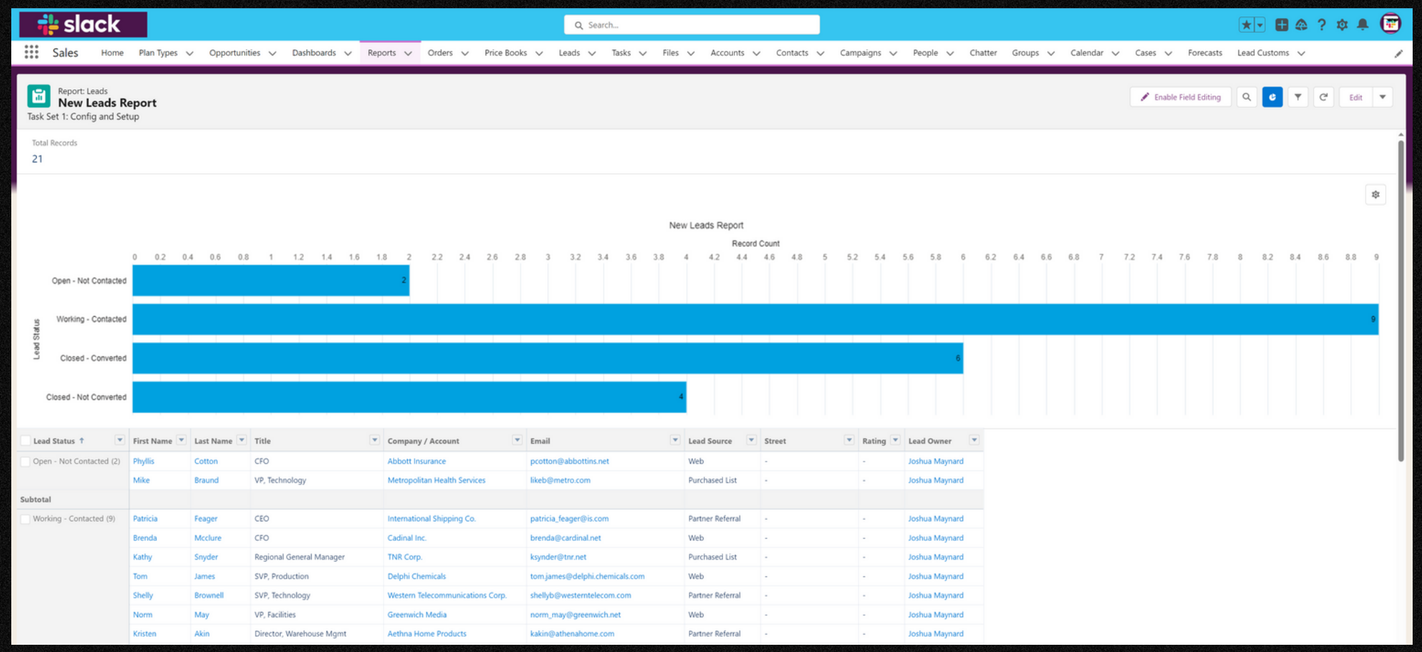
- Go to Reports > New.
  - Select the Lead object.
  - Select the Lead Status report template.
  - Click Run.

The report will be run and it will show you the leads grouped by lead status. The most common lead status will be at the top of the report.

You can use this information to identify which lead statuses are most likely to convert to opportunities. You can then focus your sales efforts on leads in these statuses.

For example, if the most common lead status is "Contacted," you can focus your efforts on calling and emailing these leads to see if they are interested in your products or services.

Example



TASK 1-B

Directive

Create a new User with specific characteristics (Profile, Username, Email, User License, Alias, Nickname and Last Name, Role) and explain why each characteristic is important.

Implementation

- Go to Setup > Users.
- Click New User.
- In the Profile field, select the profile that you want the user to have.
- In the Username field, enter a username for the user.
- In the Email field, enter an email address for the user.
- In the User License field, select the user license that you want the user to have.
- In the Alias field, enter an alias for the user.
- In the Nickname field, enter a nickname for the user.
- In the Last Name field, enter the user's last name.
- In the Role field, select the role that you want the user to have.
- Click Save.

Discussion

PROFILE: The profile determines the permissions and access rights for the user. It specifies what objects a user can read, create, or edit. It's critical for security and data integrity to ensure that users only access the data and functionality they require for their role.

USERNAME: This must be unique and is required for the user to log into Salesforce. Typically, it's in the form of an email address but doesn't have to be a valid one.

EMAIL: Salesforce uses this to send notifications, alerts, password resets, and other communications to the user. It should be a valid and frequently accessed email address.

USER LICENSE: This determines which apps the user can access and their entitlements. It's essential to ensure you're using your Salesforce licenses efficiently and not over-allocating or under-allocating resources.

ALIAS: An alias is a short, unique name to represent the user in tab headers, lists, and other places where the full username might not be necessary.

NICKNAME: This is displayed in Chatter, Salesforce's collaboration platform. It's used for mentions and other social features within Salesforce.

LAST NAME: This is a required field when creating a new user in Salesforce, and it helps in identifying users, especially in organizations with a large number of users.

ROLE: The role in Salesforce's role hierarchy determines record access. Users higher in the hierarchy will generally have access to records owned by users lower in the hierarchy, based on sharing settings. Assigning roles is crucial for data visibility and security.

TASK 1-C

Directive

Use your knowledge and creativity to **create a specific scenario wherein you convert a Lead** and explain the steps involved and their implications.

Scenarios

“A lead contacts me through my website and tells me that they are interested in my products or services.”

“I schedule a call with the lead to learn more about their needs.”

“During the call, I answer the lead's questions and explain how my products or services can help them achieve their goals.”

“I send the lead a proposal that outlines the benefits of my products or services and the pricing.”

The lead signs the proposal and becomes a customer.

Implementation

- **Identify the lead's needs.** The first step is to identify the lead's needs. What are they looking for in a product or service? What are their pain points?
- **Qualify the lead.** Once you understand the lead's needs, you need to qualify the lead. Is the lead a good fit for your products or services? Can they afford your products or services?
- **Present your solution.** Once you have qualified the lead, you need to present your solution to them. Explain how your products or services can help them achieve their goals.
- **Close the deal.** Once you have presented your solution, you need to close the deal. This means getting the lead to sign a contract or purchase order.

Implications

- You will generate new revenue.
- You will add a new customer to your portfolio.
- You will increase your market share.
- You will improve your customer satisfaction.

TASK 1-D

Directive

Create a picklist field on Account, Contact, and Opportunity that all use the same fields by using a global value set, and discuss the benefits of using global value sets.

Implementation

- Go to Setup > Object Manager.
- Select the Account object.
- Click Fields and Relationships.
- Click New.
- Select Picklist. Click Next.
- In the Field Type dropdown, select Picklist.
- In the Label field, enter a label for the picklist field (Field Name will automatically populate).
- In the Value Set field, select the global value set that you want to use. If Global, choose pre-created picklist from the dropdown. If new, then choose “Enter values, with each value separated by a new line” and fill out your selection based on your use case.
- Describe what this picklist is for in the Description box.
- Click Save.

Benefits

The benefits of using global value sets for picklist fields are:

- **It allows** you to create a single list of values that can be used on multiple objects.
- **It makes** it easier to maintain the values for the picklist field.
- **It reduces** the risk of errors when creating or editing picklist values.

TASK 1-E

Directive

Change a User's timezone from the setup **and your own timezone** from Personal Settings. Explain the difference between these two actions and why they are important.

Implementation

To change a user's timezone from the setup, you need to go to

- Setup > Users.
- Select the user that you want to change the timezone for and click the Edit button. In the Locale section, you can change the user's timezone.

To change your own timezone from your personal settings, you need to go to

- My Personal Information > Language and Timezone.

Discussion

The difference between these two actions is that **changing a user's timezone** from the setup changes the timezone for all of the user's records, while **changing your own timezone** from your personal settings only changes your timezone.

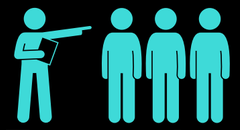
It is important to change your timezone if you travel to a different time zone. It is also important to change your user's timezone if they travel to a different time zone. This will ensure that the records for the user are accurate and that the user is able to see the correct time.

TASK 1-F

Directive

Create a **Case assignment rule** that assigns new Cases to your user. Then simulate a new case creation and observe the assignment rule in action.

Implementation



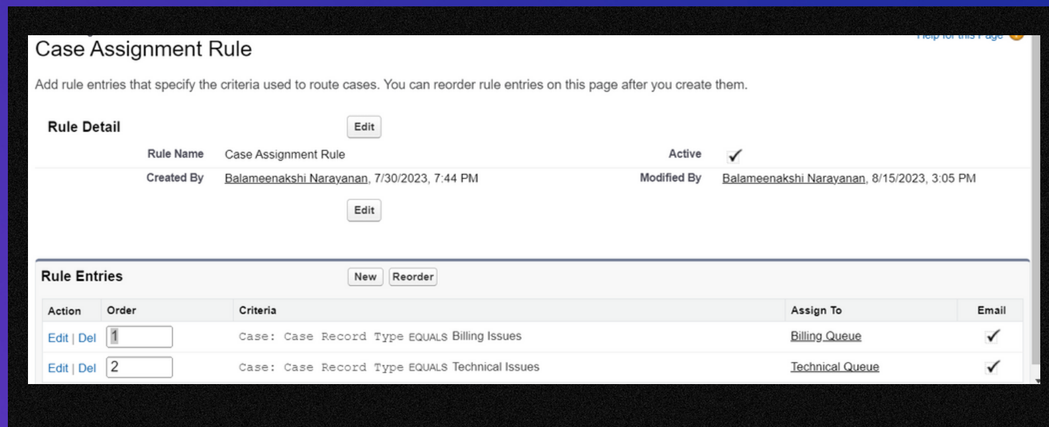
To create a case assignment rule that assigns new cases to your user

- Setup > Case Assignment Rules.
- Click New.
- In the Rule Name field, enter a name for the rule.
- Check the Active box
- Click Save.
- Under Rule Entries, click New.
- Follow the steps on the page to specify the conditions, and assign the case to your user or Queue.
- Click Save.

To simulate a new case creation

- Cases > New. Fill out the case information, but do not assign the case to a user.
- Click Save. The case will be created and assigned to your user, as specified by the assignment rule.

Example



Case Assignment Rule

Add rule entries that specify the criteria used to route cases. You can reorder rule entries on this page after you create them.

Rule Detail Edit

Rule Name	Case Assignment Rule	Active	✓
Created By	Balameenakshi Narayanan, 7/30/2023, 7:44 PM	Modified By	Balameenakshi Narayanan, 8/15/2023, 3:05 PM

Edit

Rule Entries New Reorder

Action	Order	Criteria	Assign To	Email
Edit | Del	1	Case: Case Record Type EQUALS Billing Issues	Billing Queue	✓
Edit | Del	2	Case: Case Record Type EQUALS Technical Issues	Technical Queue	✓

TASK 1-G

Directive

Create two record types of Opportunities for two distinct teams, define sales processes and page layouts for each, and discuss the benefits of using record types.

Implementation

- Setup > Object Manager > Opportunity.
- Select Record Types.
- Click New.
- Clone from existing record type if necessary.
- In the Record Type Label field, enter a name for the first record type.
- Choose a Sales Process.
- In the Description field, enter a description for the first record type.
- Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records.
- Click Next.
- Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.
- Click Save.
- Repeat these steps as required by your use case.

Benefits

The benefits of using record types are:

- **It allows** you to **tailor the sales process and page layout** to the specific needs of each team.
- It can help to improve the efficiency of the sales process.
- It can help to **improve the accuracy of the data**.
- You will **build relationships with potential customers.**
- It can help to **improve the collaboration between sales representatives.**
- It can help to **improve the reporting and analysis of sales data.**
- It can help to **improve the compliance with sales regulations.**

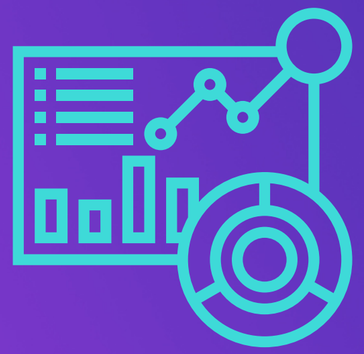
TASK 1-H

Directive

Create 2 report or dashboard folders using each of the access levels and explain the implications of each access level.

Implementation

- From the Salesforce App Launcher (waffle icon in the top left), select Reports.
- Click on the All Folders tab.
- Click on the New Folder button.
- Fill in the Folder Name and Folder Unique Name.
- Back on the “All Folders” page, select “Share” from the dropdown for this folder.
- Define sharing parameters.



Implications

- **VIEW:** Users with this access can only view the contents of the folder. They cannot edit, delete, or modify any of the reports/dashboards within this folder. Nor can they adjust the folder's sharing settings.

- **EDIT:** Users with this access can view and modify the reports/dashboards within the folder, but they can't delete them. They also cannot adjust the folder's sharing settings.

- **MANAGE:** Users with this access can view, modify, and delete the reports/dashboards within the folder. They can also adjust the folder's sharing settings.

TASK 1-1

Directive

Change 3 fields to **not-visible** and 2 fields to **read-only**, and explain the implications of these changes on user experience and data security.

Implementation

Making Fields Not-Visible:

- Setup > Object Manager.
- Select the desired object containing the fields you want to change.
- Under the object, navigate to Fields & Relationships.
- Click on the field you want to modify.
- Scroll down to Field-Level Security and click on "View Field Accessibility" or "Set Field-Level Security".
- For each profile, you can determine if the field is visible or not by checking or unchecking the Visible checkbox.
- Uncheck the Visible checkbox for the profiles where you want the field to be not visible.
- Click Save.

Making Fields Read-Only:

- Follow steps 1-5 from the previous process.

- For the desired profiles, ensure the Visible checkbox is checked (because a field needs to be visible to be set as read-only).
- Check the Read-Only checkbox for the profiles where you want the field to be read-only.
- Click Save.

Task Set 2

Object Manager and Lightning App Builder

You have received this set of instructions from a team member. Use the information garnered from your user stories and BPMs to complete the following tasks. Feel free to fill in gaps in information as needed to complete these objectives.

TASK 2-A

Directive

Change field types and see where **data loss** occurs, and discuss the precautions to be taken before changing field types.

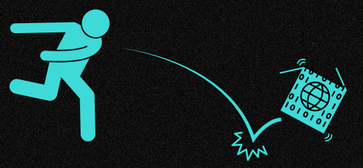
Implementation

- Setup > Object Manager.
- Select the object that contains the field that you want to change.
- In the Fields section, select the field that you want to change.
- In the Field Type dropdown, select the new field type.
- Click Save.

Discussion

Data loss can occur when you change field types if the new field type cannot store all of the data in the old field type. For example, if you change a text field to a number field, the data in the text field will be lost.

To **avoid data loss**, you should always make a backup of your data before changing field types. You should also carefully consider the implications of changing field types before making the change.



TASK 2-B

Directive

Create a dependent picklist using different controlling field types (checkbox, picklist, multi-picklist) and discuss their differences and use cases

Implementation

Access Object Manager:

- Go to Setup.
- In the Quick Find box, type "Object Manager".
- Click on Object Manager.

Select the Desired Object:

- Scroll through the list or use the search bar to find the object where you want to add the dependent picklist.
- Click on the object name.

Navigate to Fields & Relationships:

- Once inside the object, click on Fields & Relationships.

Create a New Picklist or Multi-Picklist Field:

- Click on New.
- Choose either Picklist or Multi-picklist (depending on your need) and click Next.
- Define the field's properties, such as the field label, name, and add the picklist values, then click Next.

Set Field-Level Security:

- Specify which profiles can see this new field and click Next.

Add the Field to Page Layout:

- Determine where on the page layout you want this field to appear and click Next.

Define Dependencies:

- After saving the picklist, in the field details page, look for the "Field Dependencies" button and click it.
- Click on New in the Field Dependencies section.
- Select a controlling field (either picklist or checkbox). Note: Multi-picklists cannot be used as controlling fields.
- Set the desired controlling field values to match with specific dependent picklist values. This sets the logic for which values appear based on the controlling field's selection.
- Click Save.

Test the Dependent Picklist:

- Navigate to a record within the object where you've added the dependent picklist.
- Test the picklist functionality to ensure the dependent picklist behaves as expected based on the controlling field's value.

Implications

The differences between dependent picklists with different controlling field types are:

- **Checkbox:** Dependent picklists with checkbox controlling field types are the most restrictive. The dependent picklist values are only available if the controlling checkbox field is checked. This is useful for situations where you want to ensure that users only select specific values from the dependent picklist.
- **Picklist:** Dependent picklists with picklist controlling field types are less restrictive than dependent picklists with checkbox controlling field types. The dependent picklist values are only available if the controlling picklist field is set to a specific value. This is useful for situations where you want to ensure that users only select specific values from the dependent picklist, but you want to give them more flexibility than with a checkbox controlling field type.
- **Multi-picklist:** Dependent picklists with multi-picklist controlling field types are the least restrictive. The dependent picklist values are only available if the controlling multi-picklist field contains a specific value. This is useful for situations where you want to give users a lot of flexibility when selecting values from the dependent picklist.

The use cases for dependent picklists are:

- **To restrict the values that users can select from a picklist.** For example, you could create a dependent picklist that only allows users to select the "Approved" value if the controlling checkbox field is checked.
- **To provide users with more flexibility when selecting values from a picklist.** For example, you could create a dependent picklist that allows users to select any value from the picklist, as long as the controlling picklist field is set to "Yes."
- **To enforce data consistency.** For example, you could create a dependent picklist that only allows users to select the "Closed" value if the controlling picklist field is set to "Won."

TASK 2-C

Directive

Create a roll-up summary field on a Custom Object you created, and explain how it can be used for data aggregation.

Implementation

Create a Roll-Up Summary Field on a Custom Object:

- Navigate to Setup.
- In the Quick Find box, type Object Manager and select it.
- From the list, select the master custom object where you want to add the roll-up summary field.
- In the "Fields & Relationships" section, click New.
- From the list of field types, select Roll-Up Summary and click Next.
- Define the properties for your roll-up summary field (like its label and name) and click Next.
- Choose the child object and the aggregation type (Sum, Average, Min, Max, Count).
- Set the filter criteria if required.
- Select the field from the child object to aggregate and finalize your criteria.
- Click Next, adjust field-level security if necessary, then Next again.
- Add the field to the desired page layouts.
- Finally, click Save.

Implications

Explanation:

- **Roll-Up Summary Field:** This is a custom field on the master record that aggregates values from related detail records. They are commonly used to provide calculated totals, averages, counts, min, and max values of child records.

- **Data Aggregation:** Aggregation is the process of gathering data and presenting it in a summarized format. Roll-up summary fields help achieve this by automatically performing calculations on child records without requiring manual input.

Use Cases:

- **Counting the number of related detail records.** For instance, if you have an "Event" object and a related "Participants" object, a roll-up summary on the Event can count the number of participants for each event.

- **Summing up total sales value** from a series of transactions related to a particular account.

- Getting the **latest (or earliest) date** among a set of child records.

TASK 2-D

Directive

Create a Custom Object that is a master-detail relationship with the Account. Then see if you can change the organization-wide default (OWD), and discuss the implications of changing the OWD.

Implementation

Create a Custom Object with a Master-Detail Relationship to Account:

- Navigate to Setup.
- In the Quick Find box, type Object Manager and select it.
- Click Create > Custom Object.
- Fill out the necessary details for your custom object.
- Click Save.
- Once the custom object is created, in the "Fields & Relationships" section, click New.
- From the list of field types, select Master-Detail Relationship and click Next.
- Choose Account as the related (master) object.
- Complete the field settings and click Save.

Change Organization-Wide Defaults (OWD) for a Custom Object:

- Navigate to Setup.
- In the Quick Find box, type Sharing Settings and select it.
- Under the "Custom Object Sharing Settings" section, find your custom object.
- Click Edit next to your custom object.
- Adjust the OWD settings as needed.
- Click Save.

Implications

- **Data Accessibility:** Changing the OWD directly impacts who can view or edit records. For instance, if set to "Public Read/Write", all users can view and edit records by default. If set to "Private", only the record owner, users above them in the role hierarchy, and those with specific sharing rules or permissions can view or edit.

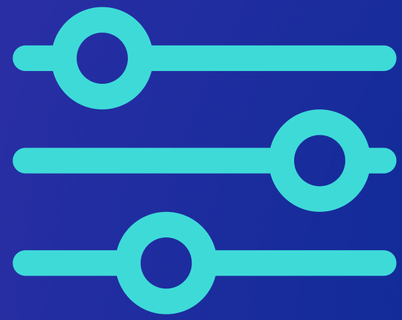
- **Data Security:** By adjusting the OWD, you either tighten or loosen the default data security. A "Private" setting is more secure, while "Public Read/Write" is more open.

- **Complexity of Sharing Rules:** If the OWD is set to "Private", you might need more sharing rules to grant additional access to specific groups or roles, adding complexity to your sharing model.

TASK 2-E

Directive

Create a group for each filtering option, and discuss the use of filters in Salesforce.



Implementation

Creating List Views with filters:

- Go to the module (like Accounts, Contacts, Opportunities, etc.) where you want to create the List View.
- Click on the dropdown next to the current view name (usually it's "Recently Viewed"), then select New.
- Name your List View and provide an optional description.
- Set the List View Visibility as per your requirement.
- Define your filter criteria.
- Save the List View.

Creating Reports with filters:

- Navigate to Reports tab.
- Click New Report.
- Choose the report type (like Accounts, Contacts, Opportunities, etc.).
- Add your filters by clicking on "Add Filter".
- Name your report and run it.

Implications

- **List Views:** Filter records in a module like Accounts or Opportunities to quickly see a subset of records, like "Accounts in California" or "Opportunities closing this month".
- **Reports:** Use filters to generate specific report data, such as "Closed-Won Opportunities above $50,000".
- **Automation:** Filters in process builders or workflow rules determine which records trigger the automation. For example, send a notification when an Opportunity stage changes to "Closed Won".
- **Dashboards:** Dashboard components often use filtered report data to display summarized information.

TASK 2-F

Directive

Create a Record action in Flow to create an Order record. The Flow can be triggered by Stage = Closed Won and the new Order record can be automatically filled with information from the Opportunity that started the process. Discuss the benefits of using Flows in Salesforce.

Implementation

Steps to Create a Record using Flow:

- Start Flow Builder: Navigate to Setup. In the Quick Find box, type “Flows”. Click Flows, and then click on the New Flow button.
- Choose Flow Type: Choose a "Record-Triggered Flow". This type of flow allows you to trigger actions based on record changes.

Define the Trigger:

- Specify the trigger to be an "Opportunity" record.
- Configure the flow to start when a record is created or updated.
- Set the condition to check if the Stage field on the Opportunity record is Closed Won.

Add Create Record Action:

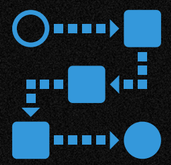
- Drag and drop the “Create Records” action from the toolbox to the canvas.
- Name it something like "Create Order Record".
- Map fields from the triggering Opportunity to the new Order record. For example, you can map the Account from the Opportunity to the Order's account field. Other details can also be mapped accordingly.

Save and Activate the Flow: After you have set up the flow as required, save it, giving it an appropriate name and description. Once saved, you need to activate the flow to make it operational.

Implications

Benefits of using Flows in Salesforce:

- **Automation:** Automate repetitive tasks or business processes which can greatly reduce manual efforts and the risk of human errors.
- **Integration:** While you mentioned integrating Salesforce with other applications, it's worth noting that this often involves more advanced tools and processes beyond Flows, such as External Services or third-party middleware.
- **Data Consistency:** Ensure data integrity and consistency by enforcing business rules and logic.
- **Enhanced User Experience:** Design user-friendly screens and guide users through specific processes, making data entry or understanding complex tasks easier.
- **Flexibility:** Flows provide a drag-and-drop interface that allows for flexibility in designing complex business processes without the need for code.
- **Adaptability:** As business processes evolve, Flows can be easily updated to reflect those changes, ensuring that Salesforce remains aligned with business needs.



TASK 2-G

Directive

Create Permission Sets including “Export Reports”, “Delete Public List Views” and “Delete Accounts”, and explain the role of permission sets in Salesforce security.

Implementation

Steps to Create a Permission Set:

- Navigate to Setup.
- In the Quick Find box, type "Permission Sets".
- Click Permission Sets under User Management.
- Click New.
- Provide a Label and Name for the Permission Set. Optionally, select a License. Click Save.
- Now, you'll be in the detail page of the permission set. To assign object permissions (like "Delete Accounts"):
- Click Object Settings.
- Find and click on the relevant object, such as "Accounts".
- Adjust the CRUD permissions as necessary and save.
- For system permissions like “Export Reports” and “Delete Public List Views”, you would:
- Click System Permissions.
- Find the relevant permissions and check them.
- Click Save.

Implications

Role of Permission Sets in Salesforce Security:

- **Granular Access Control:** Unlike Profiles, which provide a broader set of permissions, Permission Sets allow you to grant very specific permissions to users. This granularity is essential when you want to provide access without changing a user's profile or when you need to grant access to a subset of users within the same profile.

- **Flexibility:** Permission sets are additive, which means they can only grant additional permissions to what the user already has. This makes them perfect for giving additional rights without the need to modify or create new profiles.

- **Easier Management:** Especially in large organizations, using permission sets can simplify user management. It's easier to add or remove a permission set from a user than to switch profiles or modify existing profiles.

- **Dynamism:** As business needs change, you might need to quickly provide new access to a group of users. With permission sets, you can do this without touching their underlying profiles, ensuring stability while maintaining agility.

TASK 2-H

Directive

Create a Data Export scheduled for weekly backup and discuss the importance of regular data backup.

Implementation

Steps to Create a Data Export:

- Navigate to Setup.
- In the Quick Find box, type "Data Export".
- Click on Data Export under Data Management.
- Click Schedule Export.
- Choose the data you wish to export. Salesforce allows you to choose standard objects, all data, or you can manually select the data you want.
- Under Frequency, select "Weekly" for a weekly backup.
- Click Save.

Implications

Importance of Regular Data Backup:

- **Data Integrity:** Regular backups ensure that even in the event of data corruption or loss, an organization can restore a recent version of its data.
- **Compliance and Regulations:** Many industries have strict regulations around data retention and backup. Regular backups can help companies stay compliant with such regulations.
- **Operational Continuity:** In case of unexpected events, having recent backups allows businesses to quickly resume operations.
- **Mitigation against Human Errors:** Mistakes can happen. Someone might accidentally delete records or overwrite data. Regular backups ensure that such errors can be quickly rectified.
- **Protection against Malicious Threats:** With rising cyber threats, regular backups can be a safety net against ransomware or other malicious attacks.
- **Version Control:** Especially in rapidly changing environments, backups can act as version controls, allowing businesses to revert to a previous state if needed.

Task Set 3

Sales and Service

You have received this set of instructions from a team member. Use the information garnered from your user stories and BPMs to complete the following tasks. Feel free to fill in gaps in information as needed to complete these objectives.

TASK 3-A

Directive

Create Lead records, and **explain the process/steps** for Lead conversion.

Implementation

Creating a Lead:

- Navigate to Sales > Leads.
- Click New.
- Fill in the mandatory fields, such as Company, First Name, Last Name, and Email.
- Fill out any other necessary fields to provide more information about the lead.
- Click Save.

Process of Lead Conversion in Salesforce:

- Qualifying the Lead: Before you convert a lead, ensure it's qualified. This means determining if the lead has a genuine interest or need for your product/service and has the potential to become a customer.
- Open the Lead Record: From the Leads tab, click on the lead's name you wish to convert.
- Click Convert: This is typically located below the lead's name.
- Specify Conversion Details:
  - Associate the lead with an existing Account and Contact, or let Salesforce create new ones.
  - Decide if you want to create an opportunity associated with this conversion.
  - If creating an Opportunity, specify the details, like Opportunity Name, Close Date, and Stage.
- Click Convert.

Discussion

Review: Salesforce will now create an Account, Contact, and Opportunity (if chosen). You can navigate to these records to see the data that's been transferred from the lead.

TASK 3-B

Directive

Create **a record type on Opportunity for a new product line** with a **new Sales path**, **Page Layout** and add **new stage picklist values only for this record type**, and discuss how it can streamline the sales process.

Implementation

To create a record type on Opportunity for a new product line:

- Go to Setup > Object Manager.
- Search and select Opportunity.
- In the sidebar, select Record Types.
- Click New.
- Select an existing record type from which to clone the settings, then click Next.
- In the Record Type Name field, enter a name for the record type.
- Optionally, enter a Description for the record type.
- Ensure it's Active.
- Click Next.
- In the Picklist Values section, adjust the available Stage picklist values for the record type.
- Click Next.
- Assign a Page Layout specific to the record type.
- Click Save.

Implications

By creating a record type specific to a new product line:

- **Custom Sales Process:** The sales path tailored for this product line can guide sales reps through each stage, ensuring they're following best practices specifically designed for this product.
- **Dedicated Page Layout:** This ensures that reps see only the most pertinent fields and information related to this product line, reducing clutter and improving data accuracy.
- **Granular Stage Tracking:** Custom stage picklist values enable more precise tracking of the opportunity's progress, ensuring a clearer view of the sales pipeline.

TASK 3-C

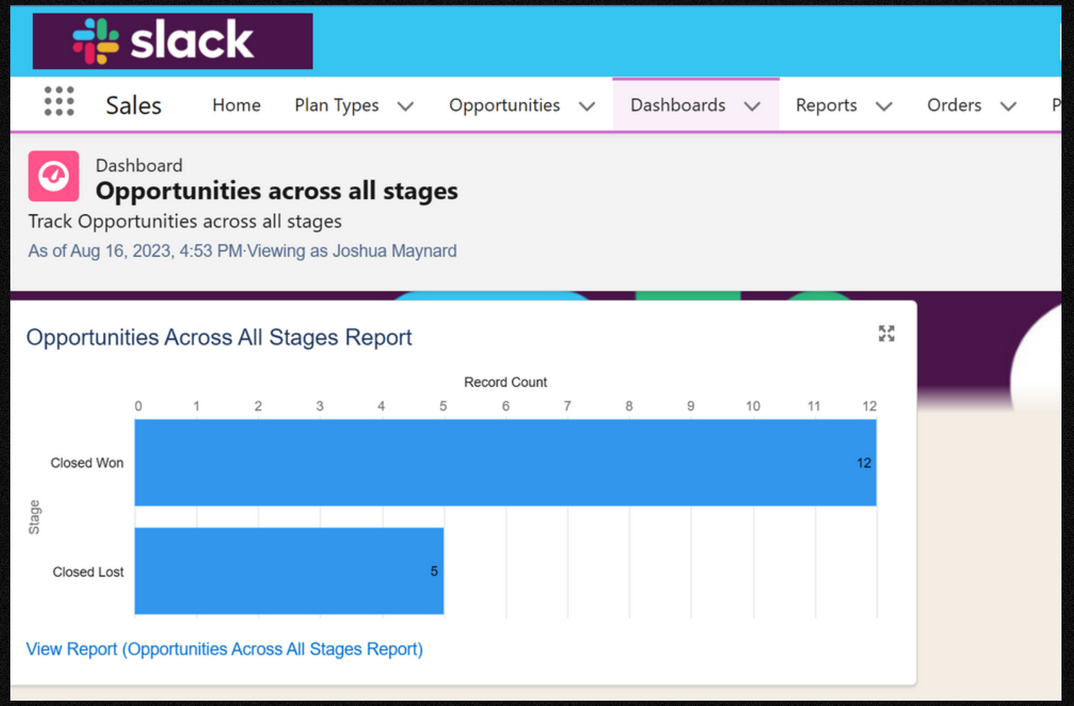
Directive

Design a basic Dashboard to track Opportunities across all stages

Implementation

- Navigate to App Launcher (grid icon in the top left corner).
- Type and select Dashboards.
- Click New Dashboard.
- In the Dashboard Name field, enter a name for the dashboard.
- Optionally, in the Folder dropdown, choose a folder to save the dashboard to.
- Click Create.
- Click Add Component.
- Choose a visualization type (e.g., bar chart, pie chart, etc.).
- In the Data Source dropdown, choose an existing report based on the Opportunity object or create a new one. The report will define which Opportunities you're looking at and what metrics (like stage, amount, close date) you want to see.
- Customize the component settings based on the metrics and groupings you want to see.
- Click Add to add the component to the dashboard.
- You can continue to add more components as needed.
- Once done, click Save.

Example



TASK 3-D

Directive

Create a Campaign and add members. **Define the ROI** of the Campaign.

Implementation

Creating a Campaign:

- From the top left, click on the App Launcher (grid icon).
- In the search bar, type "Campaigns" and click on Campaigns from the dropdown.
- On the Campaigns home page, click the New button.
- Fill out the required fields:
- Campaign Name: Enter a name for your campaign.
- Description: Optionally, provide details or an overview of your campaign.
- Type: Choose the type of campaign (e.g., Email, Webinar, Trade Show).
- Status: Set the current status of your campaign (e.g., Planned, In Progress, Completed).
- Fill out any other relevant fields for your organization's needs.
- Click Save.

Adding Members to the Campaign:

- After saving the campaign, you'll be taken to the campaign detail page.
- Scroll down to the Campaign Members related list.
- Click on Add Members. You'll have options to add members from reports, leads, contacts, etc.
- Choose your desired option (e.g., "From Leads").
- On the next page, you can search and select the Leads or Contacts you want to add to the campaign.
- Assign a Status to these members (e.g., "Sent", "Responded").
- Click Next and then Submit to add them as members.

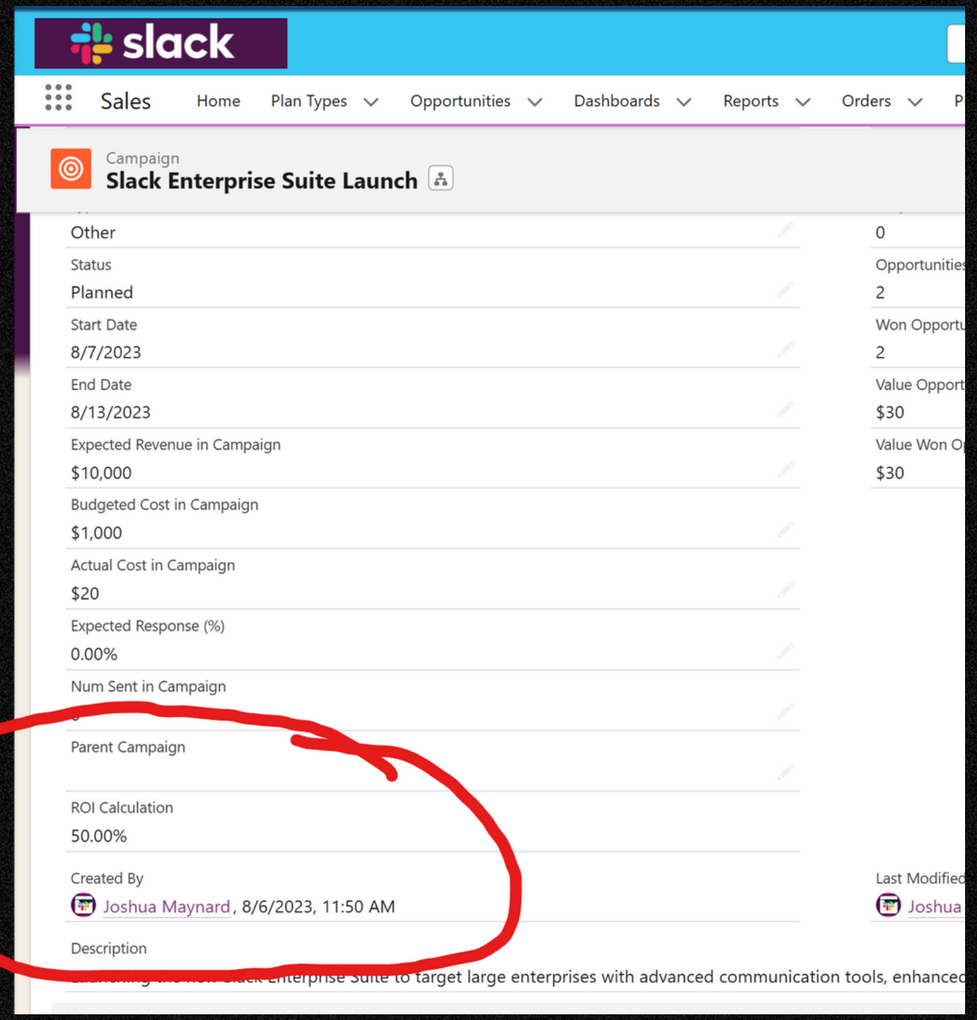
Calculating ROI:

To calculate the ROI for the campaign, you should have data on the amount spent and the revenue generated from the campaign. Salesforce provides fields to capture these data:

- Navigate to your campaign detail page.
- Look for the fields named Actual Cost and Amount Won (ROI).
  - Actual Cost: Enter the total amount spent on the campaign.
  - Amount Won (ROI): This will be the revenue from opportunities associated with the campaign.
- The ROI calculation in Salesforce is based on these fields and can be represented by:
- ROI = (Amount Won - Actual Cost) / Actual Cost
- For instance, if the campaign's actual cost was $50,000 and the revenue (Amount Won) was $100,000, the ROI would be:
- ROI = ($100,000 - $50,000) / $50,000 = 1 or 100%.
- This implies that for every $1 spent, there was a return of $1, making it a 100% ROI.
- The ROI of a campaign can be defined as the amount of revenue generated by the campaign divided by the cost of the campaign. To calculate the ROI of a campaign, you need to track the following metrics:

- **Leads generated:** The number of leads generated by the campaign.
- **Opportunities created:** The number of opportunities created by the campaign.
- **Closed deals:** The number of closed deals generated by the campaign.
- **Revenue generated:** The total revenue generated by the campaign.
- **Cost of the campaign:** The total cost of the campaign, including the cost of advertising, marketing materials, and staff time.

Example



TASK 3-E

Directive

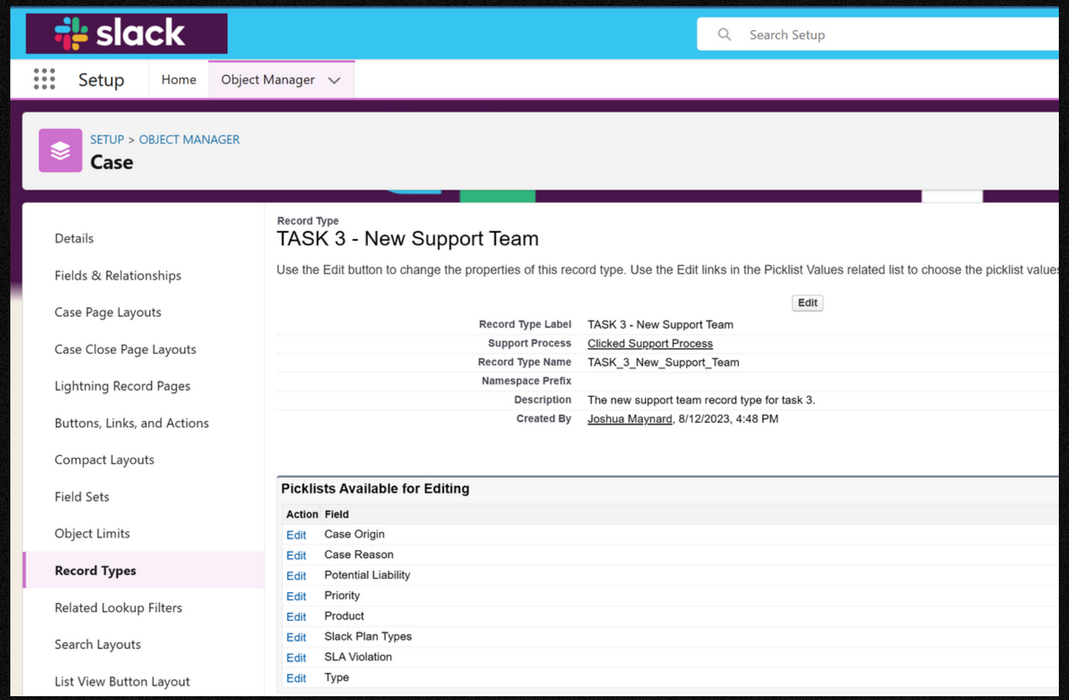
Create a Case Record type for a new Support Team and explain why are record types important?

Implementation

Steps to Create a Case Record Type:

- Click on the App Launcher (grid icon) in the top left corner.
- Type and select Setup.
- In the Quick Find box, type "Record Types".
- In the results, under the Objects section, click on Cases.
- On the Cases object detail page, scroll down to the Record Types related list and click New Record Type.
- Record Type Label: Enter a name for your new record type.
- Record Type Name: This will be automatically filled based on your label, but you can adjust it if needed.
- Description: Enter a description for the record type.
- Active: Make sure this box is checked if you want the record type to be active.
- You can associate the new record type with an existing page layout or choose to create a new one.
- Click Next and continue through the wizard (this will involve defining picklist values specific to this record type).
- Click Save.

Example



Discussion

Why are Record Types Important?

Record types are important because they allow you to customize objects for specific purposes. In this case, we are creating a record type for a new support team. The new record type can be used to track cases that are handled by the new support team. The new record type can also be used to define the specific fields that are required for cases that are handled by the new support team.

This can be useful for a number of reasons. First, it can help to ensure that cases are handled consistently by the new support team. Second, it can help to prevent cases from falling through the cracks. Third, it can help to improve the quality of customer service.

TASK 3-F

Directive

Create a Case Queue, discuss best practices of assigning to queues rather than users and use cases for assigning to both queues and users.

Implementation

Creating a Case Queue in Salesforce:

- Log in to Salesforce and switch to the Salesforce Classic view if you're in the Lightning experience, as some administrative tasks are easier in Classic.
- Click on the Setup cogwheel icon (usually in the top right corner).
- In the left-hand sidebar, under the Administration Setup section, click on Manage Users.
- Click on Queues.
- Click the New Queue button.
- In the Queue Name field, enter a name for the queue.
- In the Description field, you can optionally enter a description for the queue.
- Under Supported Objects, select Case to indicate this queue is for Cases.
- Under Available Members, add the users or roles who should be part of this queue.
- Click Save.

Note: The direct assignment of cases to the queue doesn't happen within the queue creation itself. Instead, you will set up Case Assignment Rules separately.

Creating Case Assignment Rules:

- Go back to Setup.
- In the Quick Find box, type "Case Assignment Rules".
- Click on Case Assignment Rules.
- Click New Rule.
- Fill out the required fields, like Rule Name.
- Click Save.
- Now, you will create rule entries for the assignment rule. Click New next to Rule Entries.
- Specify the Sort Order, Criteria for the case to meet this rule, and choose the queue you've just created in the User/Queue field.
- Click Save.

Now, when a case meets the criteria specified in the rule entry, it will be automatically routed to the queue you set up.

Discussion

Best Practices:

- **Grouping Cases:** Utilize queues to group cases by certain attributes, such as priority, issue type, or product. This makes it easier for agents to focus on certain types of cases.
- **Team Assignments:** Use queues to assign cases to teams or groups, ensuring no case goes unnoticed.
- **Expertise Level:** Assign complex cases to queues that consist of senior or specialized agents.

Use Cases:

- **Initial Triage:** Cases are first assigned to a general queue for initial review and are then routed to specific users or specialized queues based on the issue.
- **Team-Specific Issues:** If an issue requires a certain team's attention, such as technical support or billing, assign the case to that team's queue.
- **Geographical Routing:** For businesses operating in multiple regions, use queues to route cases based on the region or country they originate from.

TASK 3-G

Directive

Define & Create a Support Process for a new Support Team, **discuss the benefits of unique support processes**

Implementation

Define a Support Process:

- Identify the Need:
  - Determine the need for a new support process. This could be for a new product, service, or team.
- Engage Key Stakeholders:
  - Discuss with team leaders, representatives, and even a few customers to understand the typical journey of a case.
- Map Out the Process:
  - Document the typical stages a case will go through, from creation to resolution.
  - Possible stages might be: 'New', 'In Progress', 'Awaiting Customer Feedback', 'Escalated', 'Resolved', 'Closed', etc.
- Determine Roles and Responsibilities:
  - For each stage, define which team or team member is responsible.
- Incorporate Feedback Mechanisms:
  - Ensure there's a way to collect feedback on the process from both team members and customers.
- Review and Finalize:
  - Review the entire process, make adjustments as needed, and get final approval from relevant managers or stakeholders.

Create a Support Process in Salesforce:

- Navigate to Support Processes:
  - Click on Setup (typically located in the top right corner).
  - In the left sidebar, use the Quick Find box and type “Support Processes”.
  - Click on Support Processes in the search results.
- Create a New Support Process:
  - Click New Support Process.
  - Name your process and provide a description.
  - Choose the existing support process you want to clone as a starting point (usually “Master” if this is your first custom process).
  - Click Save.
- Define the Stages:
  - After saving the support process, you'll be redirected to edit the case statuses associated with this process.
  - Adjust, add, or remove statuses as needed based on the stages you defined earlier.
  - Ensure that each status indicates whether it means the case is still open or if it means the case is closed.
- Activate the Process:
  - Once set up, remember to activate your support process so it can be used.
- Associate with a Record Type:
  - For your new support process to be usable, you need to associate it with a Case Record Type.
  - Go to Setup > Cases > Record Types.
  - Create a new record type or associate your support process with an existing one.

Discussion

The benefits of unique support processes include:

- **Improved customer satisfaction:** A well-defined support process can help to ensure that customers receive consistent and timely support.
- **Increased efficiency:** A well-defined support process can help to reduce the time it takes to resolve cases.
- **Reduced costs:** A well-defined support process can help to reduce the cost of providing support.

Remember, after implementing any new process, it's a good practice to conduct training sessions with the team to ensure everyone is aligned and understands the new flow. Additionally, periodic reviews of the process will help to ensure it remains efficient and effective.

TASK 3-H

Directive

Create a Case assignment rule that **assigns a case marked critical** to yourself

Implementation

- Navigate to Case Assignment Rules:
  - Click on Setup (typically in the top right corner).
  - In the Quick Find box, type "Case Assignment Rules".
  - Click on Case Assignment Rules in the search results.

- Create a New Assignment Rule:
  - Click New Rule.
  - In the Rule Name field, enter a name for the rule, e.g., "Assign Critical Cases to Me".
  - Optionally, in the Description field, enter a description for the rule.

- Specify Rule Criteria:
  - Click Save.
  - Under your new rule, click New next to Rule Entries.
  - For the Sort Order, you can enter "1" (this determines the order rules are evaluated in).
  - In the Criteria section, set the Field to "Case: Priority", Operator to "equals", and Value to "Critical".

- Assign the Rule to Yourself:
  - In the User field (or "Assigned To" based on your Salesforce version), search for and select your own name. (If the field is a dropdown, you would need to have your name available as an option.)

- Save:
  - Click Save to finish creating the rule entry.

- Activate the Rule:
  - Return to the main Case Assignment Rules page.
  - Ensure that your new rule is set as the active rule. Only one Case Assignment Rule can be active at a time.

Discussion

Remember, always test the new rule to ensure it behaves as expected. Create a dummy case with a "Critical" priority and confirm it gets assigned to you.

TASK 3-I

Directive

Create Case auto-response rule that replies when the case comes from email.

Implementation

Create a Case Auto-Response Rule in Salesforce:

- Navigate to Case Auto-Response Rules:
- Click on Setup (typically located in the top right corner).
- In the Quick Find box, type "Case Auto-Response Rules".
- Click on Case Auto-Response Rules in the search results.

Create a New Auto-Response Rule:

- Click New Rule.
- In the Rule Name field, enter a name for the rule, e.g., "Auto-Response for Email Cases".
- Optionally, in the Description field, provide a brief explanation for the rule.
- Set Rule Criteria:
- Under "Rule Criteria", set it to run the rule if "criteria are met".
- For Field, select "Case: Origin", set Operator to "equals", and Value to "Email".
- Define the Email Response:
- Click Save & Next.
- Click New Email Template to create a new email template for the response or choose an existing one.
- If creating a new one, provide a template name, subject, and content. Ensure you include merge fields like [Customer Name] or [Case Record URL] to personalize the email.

For the email body, you can use:

Hi [Customer Name],

We've received your case and are working on it. We'll update you as soon as we have more information.

You can view your case record here: [Case Record URL]

Thanks,
[Your Company Name or Your Name]

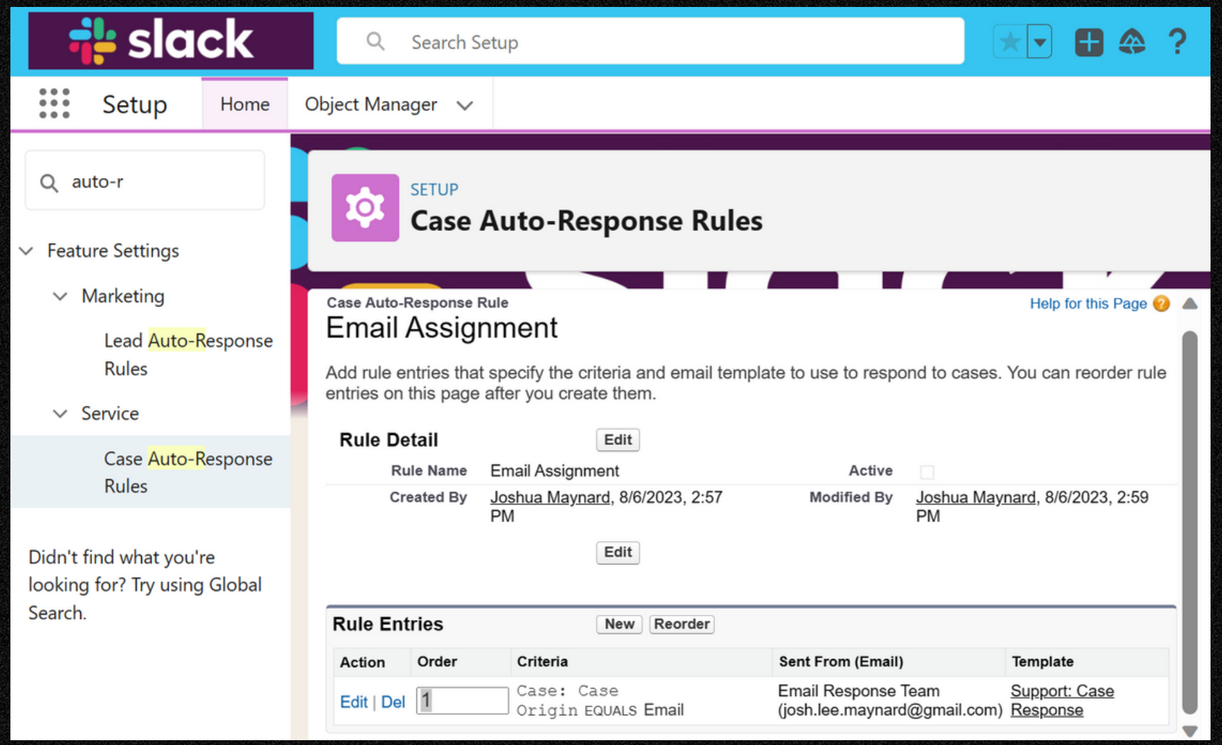
- After creating/selecting the template, set the From Name and From Email Address that the customer will see.
- Click Save.

Activate the Rule:

- Return to the main Case Auto-Response Rules page.
- Ensure your new rule is set as the active rule by checking the "Active" checkbox. Only one Case Auto-Response Rule can be active at a time.

Always remember to test any new automation in Salesforce to ensure it behaves as expected. Create a test case from an email and confirm you receive the auto-response.

Example



TASK 3-J

Directive

Create a Case escalation rule that escalates cases in new status over 30 min old.

Implementation

Create a Case Escalation Rule in Salesforce:

Navigate to Case Escalation Rules:

- Click on Setup.
- In the Quick Find box, type "Case Escalation Rules".
- Click on Case Escalation Rules in the search results.

Create a New Escalation Rule:

- Click New Rule.
- In the Rule Name field, enter a name for the rule, e.g., "Escalate New Cases Over 30 Minutes".
- Optionally, in the Description field, provide a brief explanation for the rule.
- Ensure the Active checkbox is checked so the rule is active once saved.

Set Rule Criteria:

- Click Save.
- Under your new rule, click New next to Rule Entries.
- For the Sort Order, you can enter "1" (this determines the order rules are evaluated in).
- In the Criteria section, set the Field to "Case: Status", Operator to "equals", and Value to "New".

Define the Escalation Time:

- In the Age Over field, enter "30" to represent 30 minutes.
- In the Assign to field, search for and select your own name (or the appropriate user/queue you want to escalate to).

Set the Escalation Action:

- Click Save.
- Under your rule entry, click New next to Escalation Actions.
- Set the Assign to field to the desired user or queue.
- You can also set up email notifications here.

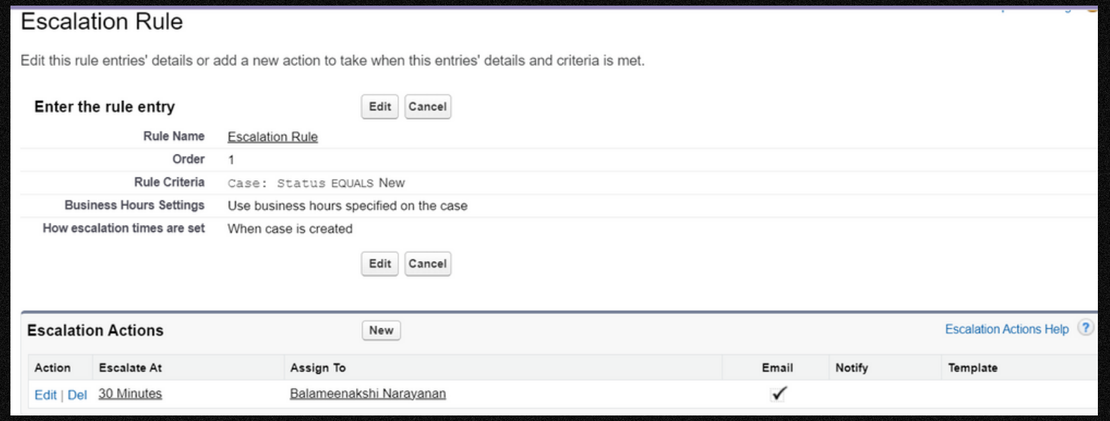
Save the Escalation Action:

- Click Save.

Activate the Rule:

- Return to the main Case Escalation Rules page.
- Ensure your new rule is set as the active rule.

Example



Escalation Rule

Edit this rule entries' details or add a new action to take when this entries' details and criteria is met.

Enter the rule entry Edit Cancel

Rule Name	Escalation Rule
Order	1
Rule Criteria	Case: Status EQUALS New
Business Hours Settings	Use business hours specified on the case
How escalation times are set	When case is created

Edit Cancel

Escalation Actions New Escalation Actions Help

Action	Escalate At	Assign To	Email	Notify	Template
Edit | Del	30 Minutes	Balameenakshi Narayanan	✓		

Discussion

Remember always to test any new automation in Salesforce to ensure it behaves as expected. Create a test case, set its status to "New", wait for over 30 minutes, and then verify the escalation occurs as intended.

TASK 3-K

Directive

Setup email to case to bring cases into this queue.

Implementation

- Navigate to Email-to-Case:
  - Click on Setup.
  - In the Quick Find box, type "Email-to-Case".
  - Click on Email-to-Case in the search results.

- Enable Email-to-Case:
  - If Email-to-Case isn't enabled, click the checkbox to Enable Email-to-Case.

- Create a New Email-to-Case Routing Address:
  - Click New Email-to-Case.
  - Enter a Routing Name.
  - Enter the Email Address that customers will use to send cases. Salesforce will provide an email service address that you should forward emails to from your desired email address.
  - For Case Origin, select "Email".
  - In the Select a Case Queue or a default Case Owner section, choose the desired queue where the cases should be created.
  - Configure additional settings like setting the case priority, and auto-response template if required.
  - Check the boxes for Attach Email and Save Email Headers if you want these details saved with the case.

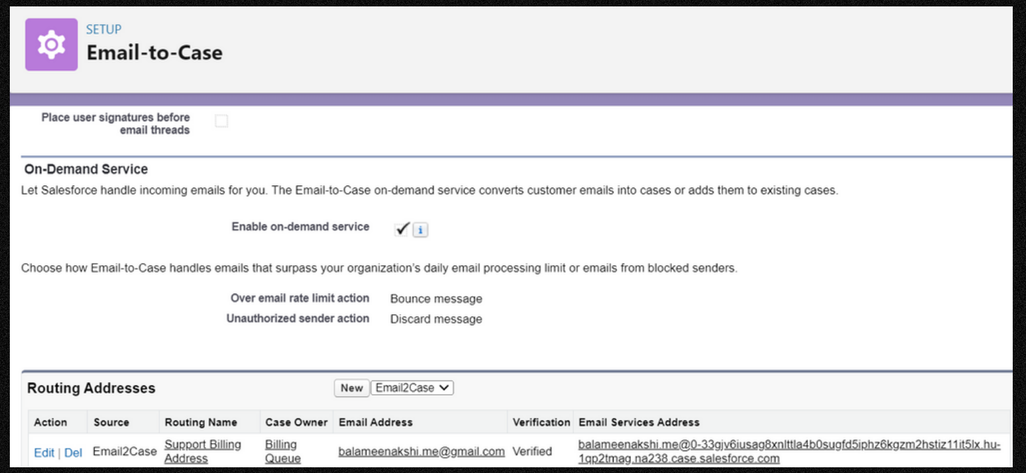
- Save the Email-to-Case Routing Address:
  - Click Save.

- Configure Your Email System:
  - You need to set up forwarding in your email system so that emails sent to the address you specified (in step 4) are forwarded to the Salesforce-generated email service address.

- Test the Email-to-Case Functionality:
  - Send an email to the email address you set up in step 4.
  - Check in Salesforce to see if the email creates a case in the specified queue.

By following these steps, emails sent to your designated address will create cases in Salesforce in the specified queue. The subject and body of the email will become the subject and description of the case, respectively.

Example



Task Set 4

Data Analytics Management and Productivity

You have received this set of instructions from a team member. Use the information garnered from your user stories and BPMs to complete the following tasks. Feel free to fill in gaps in information as needed to complete these objectives.

TASK 4-A

Directive

Create a case status report to be emailed daily at 7am.

Implementation

Navigate to Reports:

- From the main menu, click on Reports.
- Create a New Report:
- Click on New Report.
- In the Choose a Report Type dialog, select Cases under the Standard Reports category and click Continue.
- Configure Your Report:
- In the Columns section, add the columns you want to see in the report, such as Case Number, Status, Subject, etc.
- In the Filters section, adjust any filters to narrow down the results if needed.

Save the Report:

- Click Save.
- In the Report Name field, enter a name for the report.
- Optionally, fill in the Report Unique Name and Description fields.
- Choose a report folder where you'd like to save this report and click Save again.

Access the Report Scheduler:

- With the report open, click on the Arrow next to the Edit button.
- Select Schedule Future Runs.

Configure the Schedule:

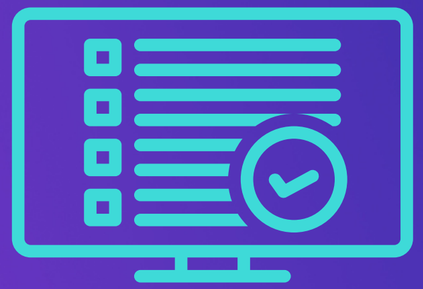
- For Frequency, select Daily.
- For Start Date, select the date you want to start the email.
- For End Date, you can either select a specific date or keep it running indefinitely.
- For Preferred Start Time, select 7:00 AM.

Set Up the Email:

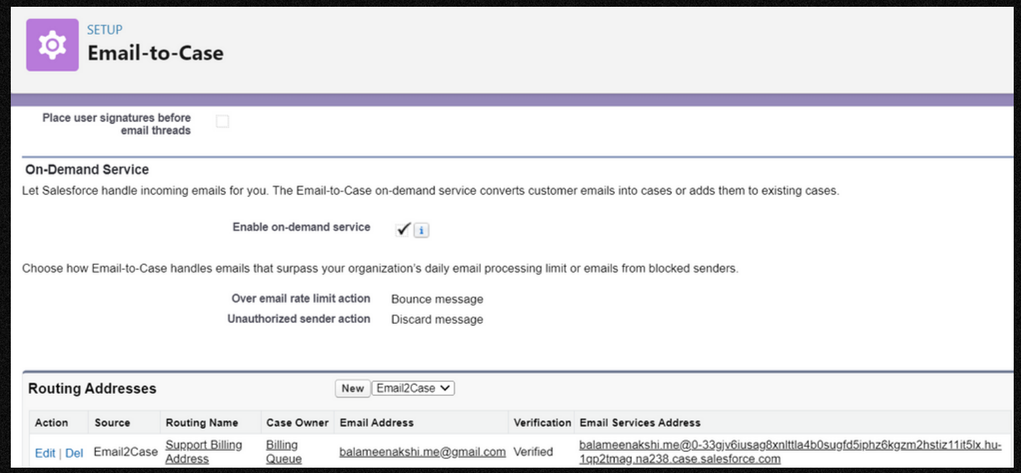
- In the Recipients section, add the users or public groups you want to email.
- Optionally, set up the email subject and comments.

Activate the Schedule:

- Click Save & Report to save your changes and run the report immediately or click Save to save without running the report.
- Your report will now be emailed daily at 7am to the specified recipients.



Example



Discussion

Remember always to test new configurations to ensure they behave as expected. Wait until the next day or adjust the schedule temporarily to ensure the email sends as intended.

TASK 4-B

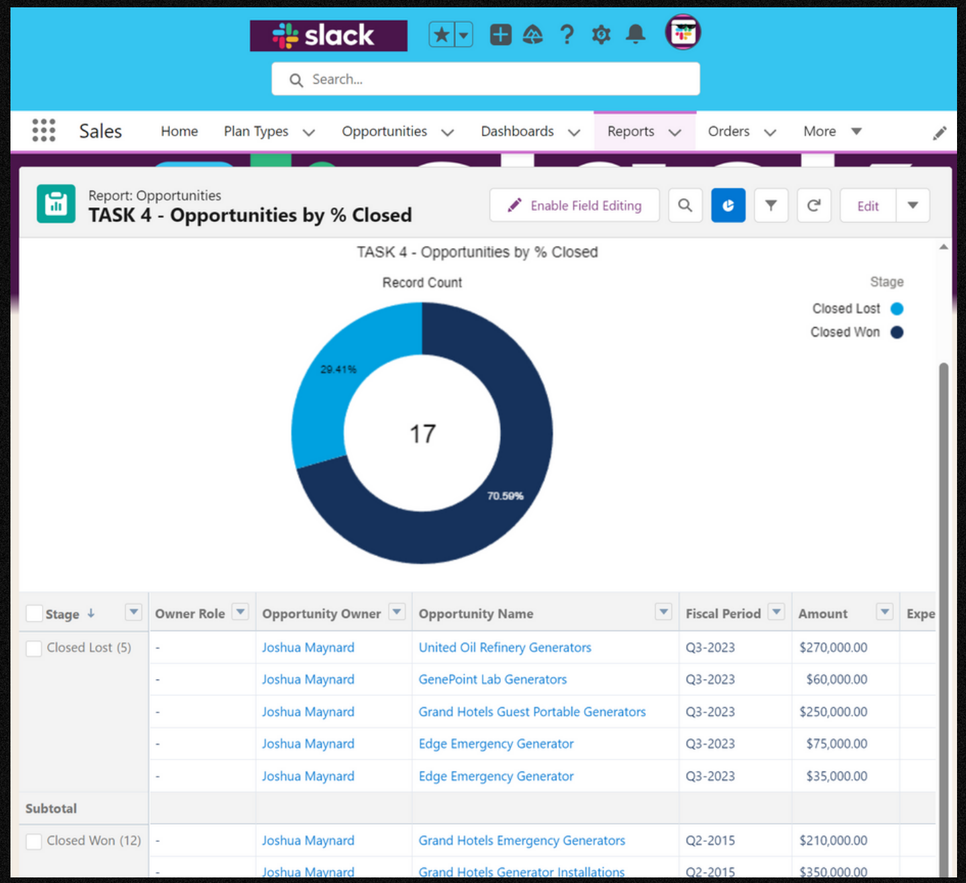
Directive

Enhance your Dashboard to track Opportunities by adding % Closed, pipeline by Rep and other metrics you deem important to sales leaders.

Implementation

- Navigate to Dashboards: From the App Launcher (grid icon) or top navigation menu, select Dashboards.
- Open Your Dashboard: If you have a specific dashboard you want to edit, click on its name. If you need to create a new one, click on the 'New Dashboard' button.
- Edit Dashboard: If you are editing an existing dashboard, click the Edit button.
- Add a Component: Click on the '+ Component' button.
- Choose Data Source: You'll need a Report that contains the data you want to display. If you haven't created one yet, you'll need to create a Report first. For the purpose of this explanation, let's assume you have a report with Opportunities and associated metrics.
- Select Display Type: Based on the data and metrics you want to display, choose the appropriate display type like bar chart, pie chart, gauge, etc.
- Customize Component:
  - For '% Closed', you might want to show a gauge or a pie chart based on the stage of the opportunity.
  - For 'Pipeline by Rep', a grouped bar chart might be appropriate, with each rep being a group and the value of their opportunities being the height of the bars.
- Save & Position: Once you've customized the component, click on the Add button. You can then drag and position it on the dashboard as you see fit.
- Finish Editing: After you've added all desired components, click on the Save or Done Editing button.
- View & Share: You can now view your enhanced dashboard and share it with sales leaders or other team members.

Example



Discussion

Remember, a lot of the visualization's effectiveness depends on the underlying report, so ensure that you have correctly set up your reports with the necessary filters and grouping before creating the dashboard components.

TASK 4-C

Directive

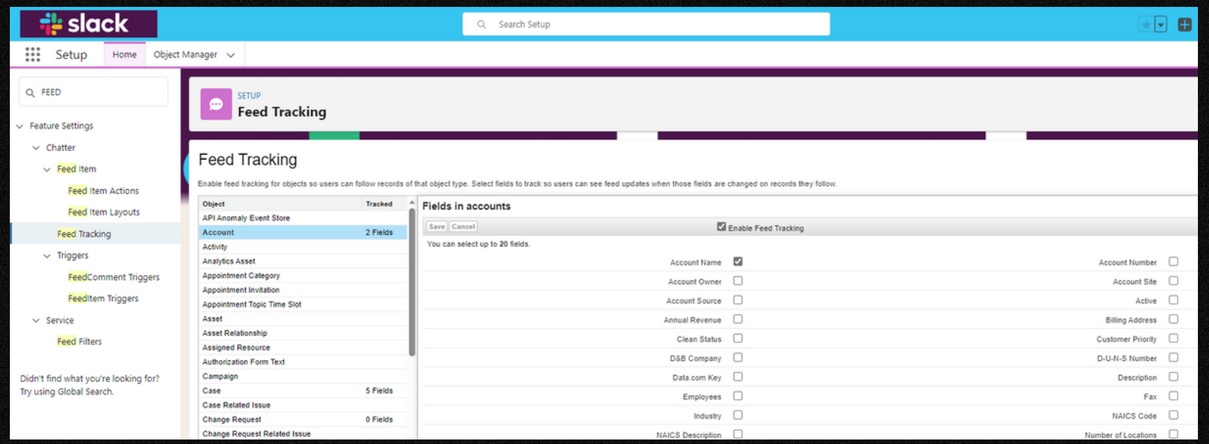
Enable Feed Tracking on Leads, Accounts, Cases & Opportunities

Implementation

- From your Salesforce homepage, click on the gear icon in the top right corner and then select Setup.
- In the Quick Find box, type "Feed Tracking".
- Click on Feed Tracking under the "Chatter" section.
- Here, you'll see a list of objects that you can enable Feed Tracking for. Click on each object name (Leads, Accounts, Cases, Opportunities) one by one.
- Once inside the object-specific settings:
- Check the box next to Enable Feed Tracking.
- You can also choose which specific fields you want to track changes for by checking the boxes next to each field name.
- After selecting your preferences, click the Save button.
- Repeat steps 4-6 for each of the objects (Leads, Accounts, Cases, Opportunities).

Once you have enabled feed tracking, any selected changes to these objects will be posted to the Chatter feed of the record, allowing users to see a history of changes and collaborate on them. This can be helpful for tracking the progress of deals and for staying up-to-date on changes to your data.

Example



TASK 4-D

Directive

Use Data Import Wizard to import leads into Salesforce.

Implementation

- From Set Up, type in "Data Import Wizard" and select Data Import Wizard under "Integrations".
- Click "Launch Wizard!"
- Choose which kind of data you are importing - Standard Objects or Custom Objects.
- Select the Objects.
- Choose whether you want to ADD new records, UPDATE existing records, or BOTH.
- Select matching parameters, based on what you've chosen earlier.
- Choose a CSV File: Click Choose a CSV file, then browse your computer to select the CSV file you wish to import. Salesforce typically provides a template that you can download, populate, and then upload.
- Click Next.

Once you've chosen your file, Salesforce will automatically start mapping fields that it recognizes.

- Map Fields: For fields that Salesforce doesn't recognize, you'll need to manually map the CSV columns to Salesforce fields. Ensure the CSV columns have clear headers to make this process easier.

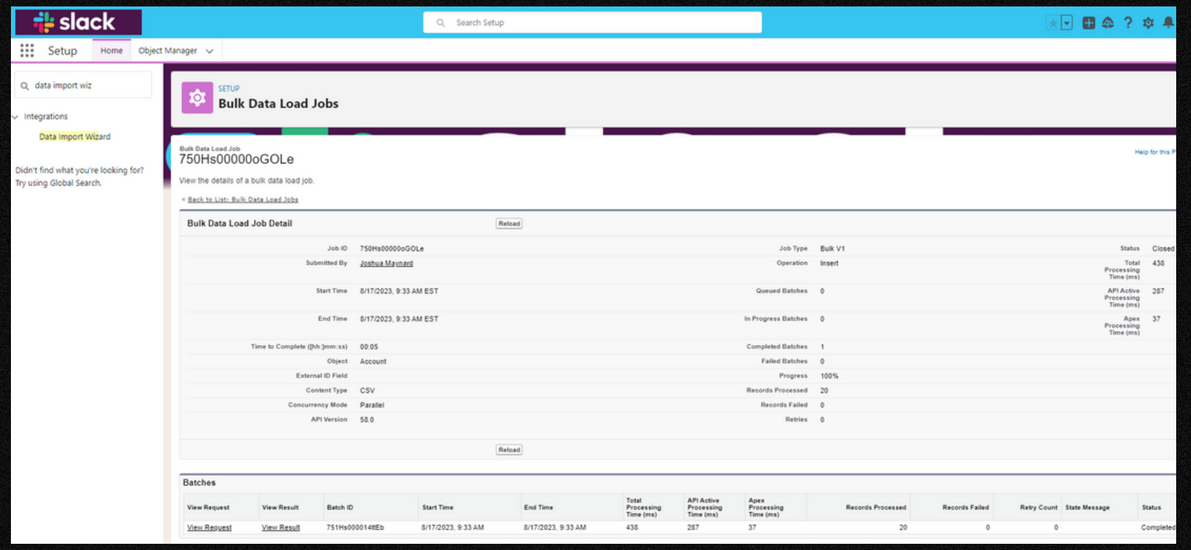
- After you've mapped all the fields, click Next.

- You'll get a summary of what's about to be imported.

- Click Start Import.

Salesforce will then begin the import process. Depending on the number of records you're importing, this might be immediate, or it might take some time. Salesforce will usually send you an email notification once the import is complete.

Example



TASK 4-E

Directive

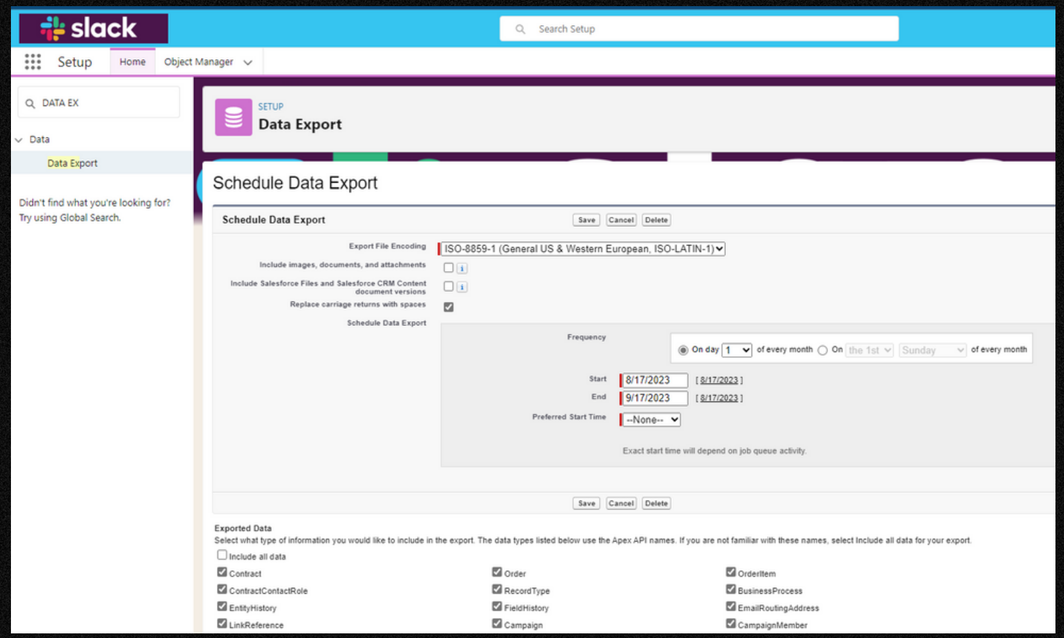
Schedule a Data Export for weekly backup.

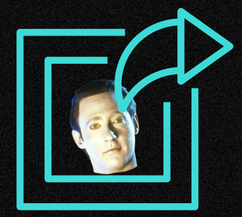
Implementation

- From your Salesforce homepage, click on the gear icon in the top right corner and select Setup.
- In the Quick Find box, type "Data Export" and click on Data Export.
- On the Data Export page, you'll find options for exporting your data. You can:
- Select the Encoding which is useful if you have special characters in your data.
- Choose which data to export. This includes standard and custom objects. Check the boxes next to the types of data you want to include in your export.
- Under Exported Data, select the file format for your export. This will typically be Comma Delimited .csv.
- In the Schedule Export section, check Schedule Export. Once checked, options will be available for scheduling. Since you want a weekly backup, choose Weekly. **NOTE: Manual weekly data exports in Salesforce using the native functionality are only available in Enterprise, Performance, and Unlimited Editions.**
- Click Save to schedule the export.

Salesforce will now export your data based on your schedule. When the export is complete, links to download the exported files will be available in the Data Export page. Also, Salesforce will notify you by email when your data is ready to be downloaded.

Example





Remember:

- Depending on your Salesforce edition and user permissions, you might be limited in how frequently you can export data. For instance, some editions only allow for monthly exports.
- The data export process is a full backup of your data, and the resulting files can be quite large, especially if your Salesforce instance has a large amount of data.
- Always store your backups in a safe and secure location, as they contain your organization's critical data.

TASK 4-F

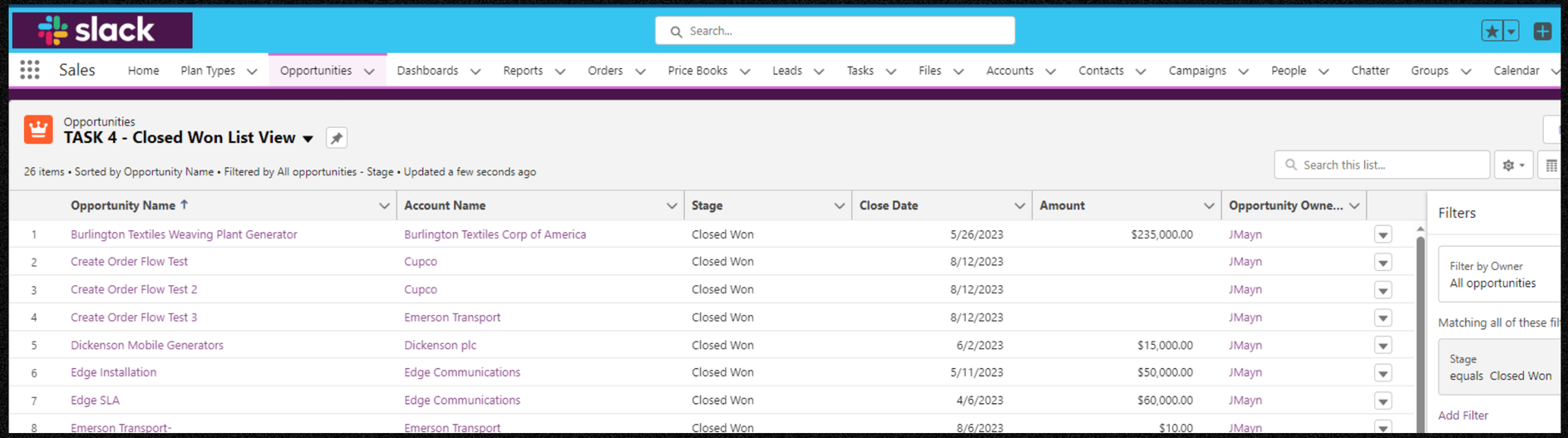
Directive

Create public list views on the Opportunity object, one for each stage.

Implementation

- Navigate to Opportunities from the App Launcher or your Salesforce homepage.
- In the Opportunities tab, click on the the gear icon directly to the right of “Search this list…”. From the dropdown, select New.
- In the List View Name field, enter a name for the list view that corresponds to a stage (e.g., "Prospecting Opportunities").
- Under “Who sees this list view?” select “All users can see this list view.”
- Click Save.
- Under Filter Opportunities, set the criteria that will filter the opportunities based on the stage. For instance:
- Field: Stage
- Operator: equals
- Value: [select the stage, e.g., "Closed Won"]
- Click Save.
- Repeat the process for each stage in the Opportunity lifecycle.

Example



TASK 4-G

Directive

Create a list view for cases that **allows Inline editing**

Implementation

- From Setup, in the Quick Find box, enter "User Management", and then select User Management Settings.
- Enable Enhanced Profile User Interface

Record Type considerations

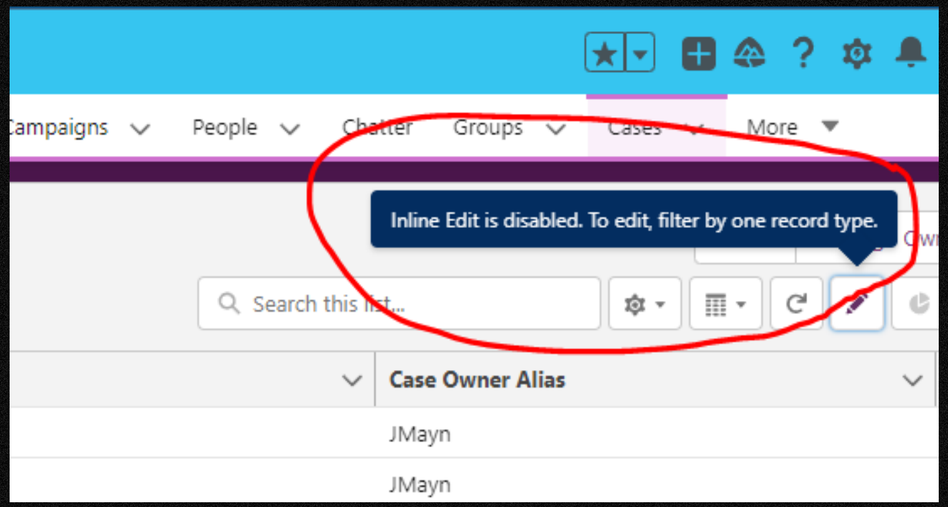
- If an object uses Record Types, you must set up a "Record Type" List View Filter to filter the list view by a single record type. Inline editing only works for lists that have been filtered for a single record type.
- Example: "Record Type EQUALS Business Account" or "Record Type EQUALS <blank>" (for records that don't have a record type)
- If an object's record types are all in "Inactive" status, inline editing won't work for the affected records. To resolve this issue:
- Delete all inactive record types for that object
- Update your record types so that there is at least one active record type ****
- Note: This 'active' record type doesn't need to be assigned to any profiles.
- After this is done, add the list view filter "Record Type EQUALS <blank>"

Defining the filters for the List View is the same process as STEP 4-F, just using the "Cases" tab instead of "Opportunities".

- Ensure the fields you want to edit in the list view are editable at the profile and field level permissions. Also, some fields, such as formula fields or roll-up summary fields, are not inline editable regardless of the list view settings.
- To utilize inline editing:
- Navigate to the list view you created.
- Hover over a field you wish to edit until it becomes underlined and click on it. You can then make changes right there without having to go into the record's detailed page.

There are many other factors to consider when defining this process. Please seek assistance at help.salesforce.com if you run into any issues.

Example



TASK 4-H

Directive

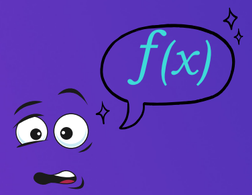
Choose a use case for **row level formulas** in a report and implement

Implementation

Use Case: Let's say you want to calculate the days it took from creating an Opportunity to closing it. This would be the difference between the Close Date and the Created Date for each Opportunity.

- Navigate to Reports from the App Launcher or your Salesforce homepage.
- Create a new report or edit an existing Opportunity report.
- Once in the report builder, you should see an option labeled Columns. Click the dropdown button and select Add Row-Level Formula.
- Click Add Formula.
- Provide a Formula Name - under “Column Name” - like "Days to Close".
- For Format, select Number.

In the formula editor, you would use a formula like:

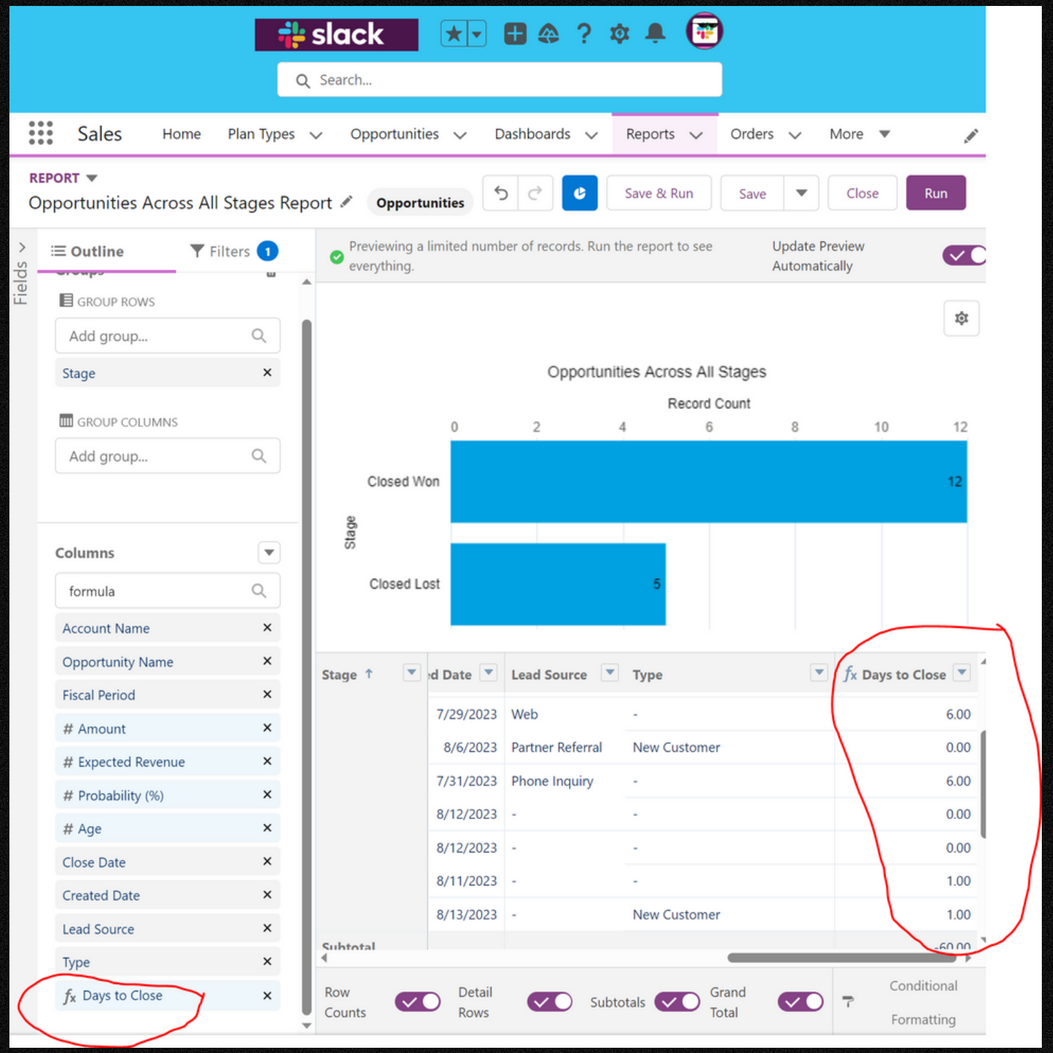


CLOSE_DATE - DATEVALUE(CREATED_DATE)

This formula calculates the number of days between the Created Date and the Close Date of the Opportunity. You can select available fields to build your formula with from the left hand column.

- Check validation. If valid, Click Apply.
- Drag and drop the new "Days to Close" formula field into your report columns if it hasn't been added automatically.
- Complete the rest of the report configuration as needed and then run or save the report.

Example



TASK 4-1

Directive

Create a chatter group called “HUZZAH” and **automatically post details** of closed/won opportunities **to it.**

Implementation

Create the Chatter Group

- Navigate to Chatter.
- Click on Groups in the left-hand menu.
- Click the New Group button - the plus sign.
- Fill out the Group Name field (e.g., "HUZZAH") and other pertinent details (like access type).
- Click Save and Next.
- Upload Group Photo.
- Add members.
- Click Done.
- Use Flow to Post to Chatter Group
- Navigate to Setup.
- In the Quick Find box, type "Flows" and select it.
- Click on New Flow.
- Choose Record-Triggered Flow.
- Configure the flow's trigger to start after a record is updated.
- Set the object to Opportunity.
- Set the condition requirements. For example, you might have a condition that checks if Opportunity.StageName equals "Closed Won".
- In the “When to Run the Flow for Updated Records” section, select “Every time a record is updated and meets the condition requirements”
- Select “Optimize the flow” for “Actions and Related Records”.
- Click Done.

Get Records from Opportunity:

- Element Name: Enter a descriptive name, like "Get Opportunity Details".
- API Name: This will auto-populate based on the Element Name you provide.
- Object: Choose Opportunity from the dropdown list.
- Filter Records:
- Field: Choose Opportunity.Id from the dropdown.
- Operator: Choose Equals from the dropdown.
- Value: Use the global variable {!$Record.Id}. This refers to the ID of the Opportunity record that triggered the flow.
- How Many Records to Store: Choose Only the first record since we're working with just the Opportunity that triggered the flow.
- How to Store Record Data:
- Click on Choose a variable.
- Choose the option to create a new variable. This variable will hold the Opportunity data you fetch.
- API Name: Something like fetchedOpportunity.
- Data Type: Record
- Object: Opportunity
- Make sure to check the box for "Available for input" and "Available for output".
- Click Done on the variable creation dialog.
- Which fields to get: This depends on the details you want for your Chatter post. For our example, you'll want to at least select:
- Name
- Amount
- OwnerId (If you want to fetch the owner's name, you'll need another "Get Records" for the User object. If you just want to post the ID, then fetching this field is enough.)
- Click Done.

Post to Chatter:

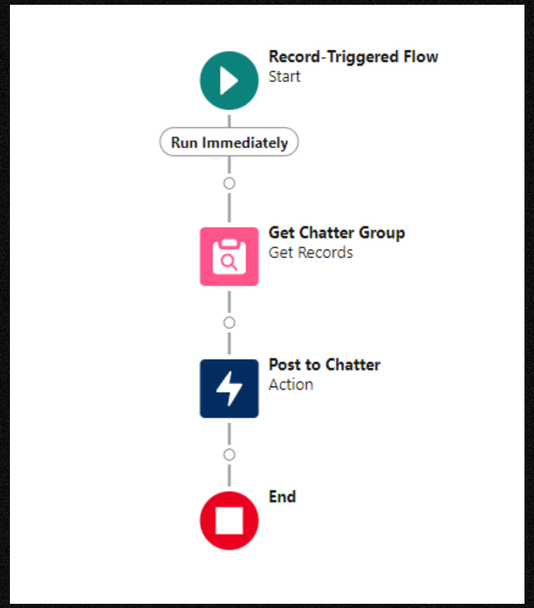
- Drag and drop the Action element to the canvas.
- Search for and select the Chatter action named something like "Post to Chatter".
- Set the target of your post to be the “HUZZAH” group.
- Configure the message for the post. You will need to create it as a Text resource, and reference it in the “Post to Chatter” action element. For example:
- Congratulations! {!Opportunity.OwnerName} just closed the {!Opportunity.Name} deal worth {!Opportunity.Amount}.
- Click Done.

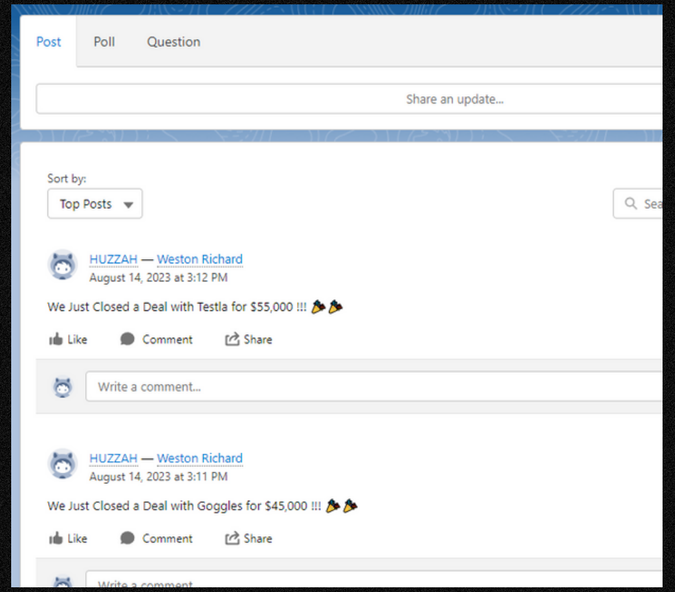
Connect your elements: Trigger -> Get Records -> Post to Chatter.

- Click Save and name your flow.
- After saving, click Activate.
- Now, when an Opportunity reaches the "Closed Won" stage, the flow will trigger, and a post will be made to the "HUZZAH" Chatter Group with the details.

oh
my
goodness

Example





Task Set 5
Workflow and Process Automation

TASK 5-A

Directive

Design Approval Process
for Opportunities

Implementation

- Go to Setup > Approval Processes.
- Click Opportunity from the "Select the type of record" dropdown.
- Click Create New Approval Process > Use Standard Setup Wizard.
- Fill out the Name, Unique Name, and Description. Click Next.
- Define entry criteria: Opportunity: Amount greater than 50000. Click Next.
- Set up the approval steps: define who should approve, add email alert, and rejection behavior.
- Select Fields to Display on Approval Page Layout. Click Next.
- Specify Initial Submitters
- Click Save.
- Define approval step. Click Go.
- Enter Name and Description of New Approval Step. Click Next.
- Specify step criteria. Click Next.
- Select Assigned Approver. Click Save.

For testing, create an Opportunity with an amount over $50,000. Submit for approval. As the designated approver, either approve or reject.

Example

Approval Processes

Opportunity: Approval Process on Opportunities

Help for this Page

« Back to Approval Process List

Process Definition Detail Edit | Clone | Deactivate

Process Name	Approval Process on Opportunities	Active	✓
Unique Name	Approval_Process_on_Opportunities	Next Automated Approver Determined By	Manager of Record Owner
Description			
Entry Criteria	Opportunity: Amount GREATER THAN 0		
Record Editability	Administrator **ONLY**	Allow Submitters to Recall Approval Requests	
Approval Assignment Email Template			
Initial Submitters	Opportunity Owner		
Created By	Balameenakshi Narayanan, 8/14/2023, 3:44 PM	Modified By	Balameenakshi Narayanan, 8/14/2023, 4:26 PM

Initial Submission Actions Add Existing | Add New

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit | Remove	Field Update	Approval Status Pending

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions | Edit	1	Manager Approval	Approval Process for Opportunities that requests approval on deals over $50,000	Opportunity: Amount GREATER OR EQUAL 50000 **, else Approve**	User:Meena Shree	Final Rejection
Show Actions | Edit	2	VP of Revenue Approval	Approval Process for Opportunities that requests approval on deals over $80,000	Opportunity: Amount GREATER OR EQUAL 80000	User:Ezra White	Final Rejection

Final Approval Actions Add Existing | Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit | Remove	Field Update	Approval Status Approved

TASK 5-B

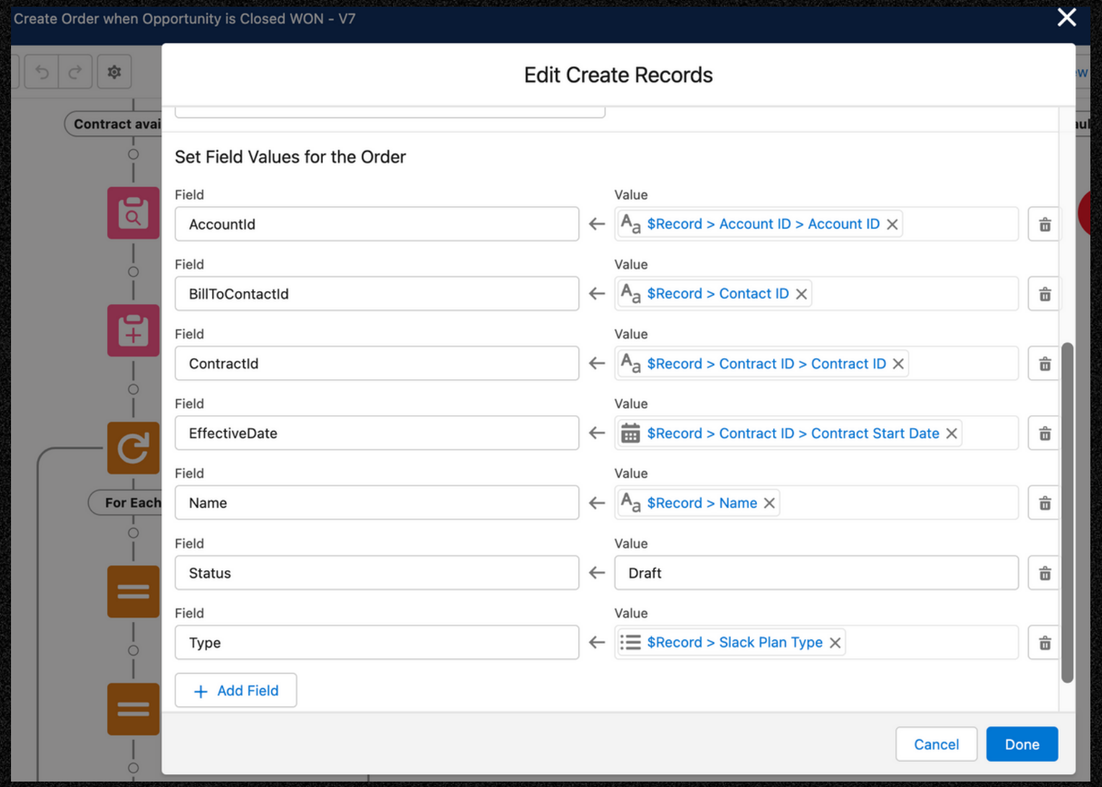
Directive

Create a flow that creates an Order record when Stage = Closed Won. The new Order record should be automatically filled with information from the Opportunity.

Implementation

- Starting the Flow:
  - Go to Setup.
  - In the Quick Find box, type Flows.
  - Click Flows.
  - Click New Flow.
  - Choose Record-Triggered Flow and click Next.
- Setting the Trigger:
  - For the trigger type, choose When a record is created or updated.
  - Set the object to Opportunity.
  - Configure when the flow is triggered (e.g., only when a record is updated, not when it's created).
  - Click Done.
- Setting the Criteria:
  - Drag a Decision element onto the canvas.
  - Set the criteria to:
    - Field: Opportunity.StageName
    - Operator: Equals
    - Value: "Closed Won"
  - This will ensure the flow only progresses if the Opportunity is marked as "Closed Won".
- Create Order Record:
  - Drag the Create Records element onto the canvas.
  - Connect the "True" path of the Decision element to this action (assuming you named the "Closed Won" path as True).
  - For the object type, choose Order.
  - Set how many records to create: One.
  - Set how to set the record fields: Use separate resources, and literal values.
  - Map relevant fields from the Opportunity to the Order. For example:
    - For Order Name: {!$Record.Name}
    - Map other fields as necessary, such as AccountID, TotalAmount, etc.
  - Click Done.
- Save and Activate:
  - Click Save at the upper right.
  - Provide a name and description for your flow.
  - Once saved, click Activate.
- Test the Flow:
  - It's always a good practice to test your flows in a sandbox or developer environment first. Change an Opportunity's stage to "Closed Won" and verify that an Order record is correctly created.

Example



TASK 5-C

Directive

Create Auto-Response rules for all leads and test with a new lead.

Implementation

- Navigate to Auto-Response Rules:
  - Go to Setup.
  - In the Quick Find box, type "Auto-Response Rules".
  - Click on Lead Auto-Response Rules under "Marketing".

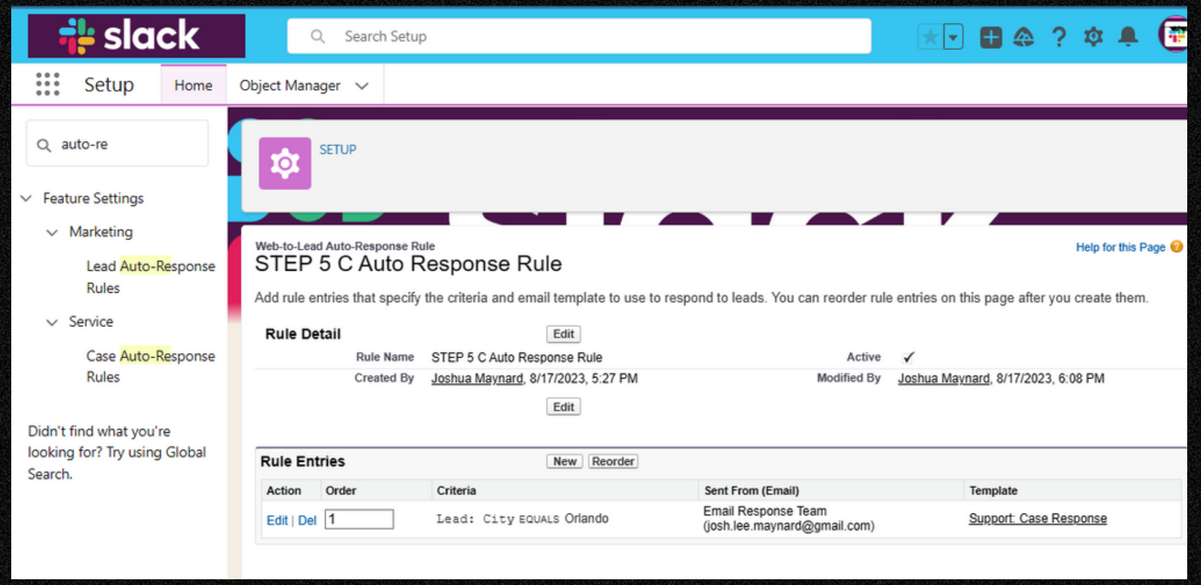
- Create a New Rule:
  - Click the New Rule button.
  - Provide a Rule Name.
  - Click Save.

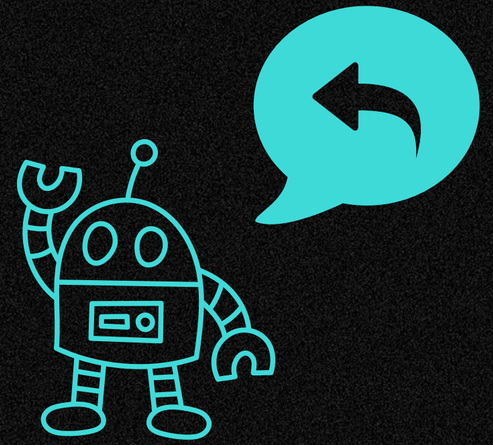
- Define Rule Criteria:
  - Click on the Rule Name
  - Under “Rule Entries”, click “New”
  - Set the sort order (just choose 1 for now, read up on it later)
  - Select the criteria for the rule entry - criteria are met
  - Standard Salesforce Formula Logic. Like Field - Lead: City/Operator - equals / Value - Orlando
  - Follow the remainder of the instructions on the screen and select save.

- Activate the Rule (if you haven't done so in step 2):
  - Go back to the list of Lead Auto-Response Rules.
  - Next to your rule, check the "Active" box.
-
- Test the Rule:
  - Create a new lead that matches the criteria you set for the auto-response rule.
  - Check the email associated with the lead to ensure that the auto-response was sent.

- Remember that auto-response rules only work for leads that are created via web-to-lead, lead assignment rules, or the API. They won't work for leads manually created through the Salesforce interface unless created via the above-mentioned methods.

Example





TASK 5-D

Directive

Implement a Validation rule on Opportunity that prevents a stage changed if the next steps is blank.

Implementation

Navigate to Opportunity Validation Rules:

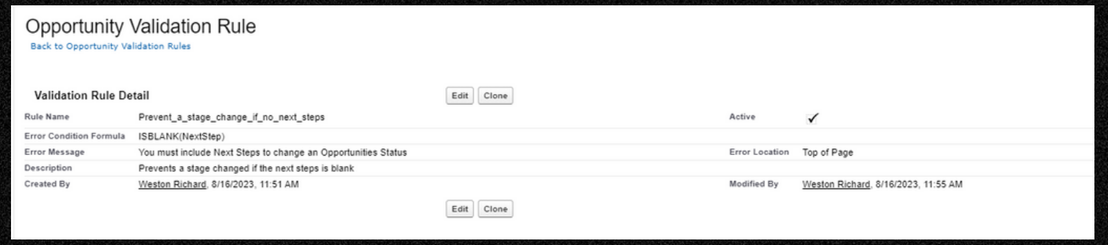
- Go to Setup.
- Object Manager > Opportunity > Validation Rules
- Create a New Validation Rule:
- Click the New button.
- Define Rule Criteria:
- For Object Name, it should already be set to Opportunity.
- In the Rule Name field, give a descriptive name for the validation rule.
- (Optional) Add a description for the rule.
- In the Formula or Condition Formula box, enter the following formula:This formula checks if the StageName has been changed and the NextStep field is blank. If both conditions are true, the validation rule triggers.

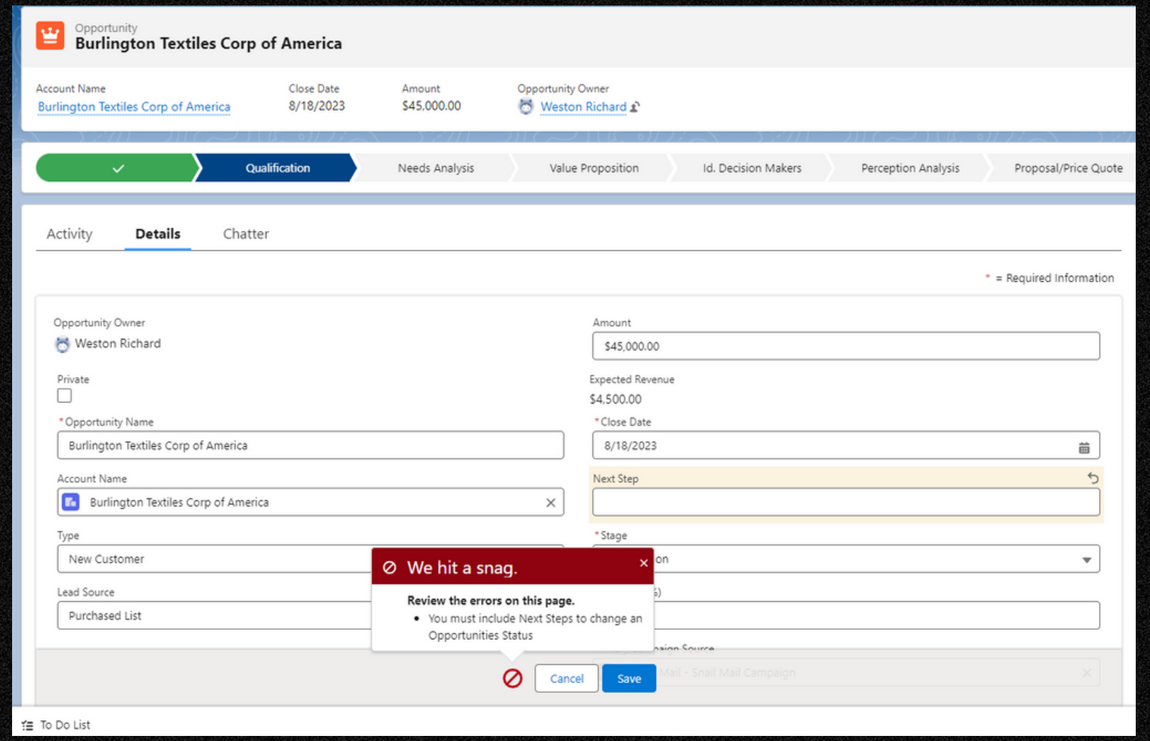
AND(ISCHANGED(StageName), ISBLANK(NextStep))

- Provide Error Details:
- Enter an Error Message. For instance: "You must provide a Next Step before changing the Stage."
- Choose the Error Location on the page where you want the error message to be displayed. Usually, it's ideal to display it next to the field being validated, so you might select NextStep from the dropdown.
- Save and Activate:
- Click the Save button.
- The rule should be active by default upon creation. If not, there will be a checkbox to activate it.
- Test the Rule:
- Navigate to any Opportunity record.
- Try changing the stage without filling out the NextStep field.

You should see the validation error when you attempt to save.

Example





TASK 5-E

Directive

Develop lead assignment rules and distribute leads based on the set criteria.

Implementation

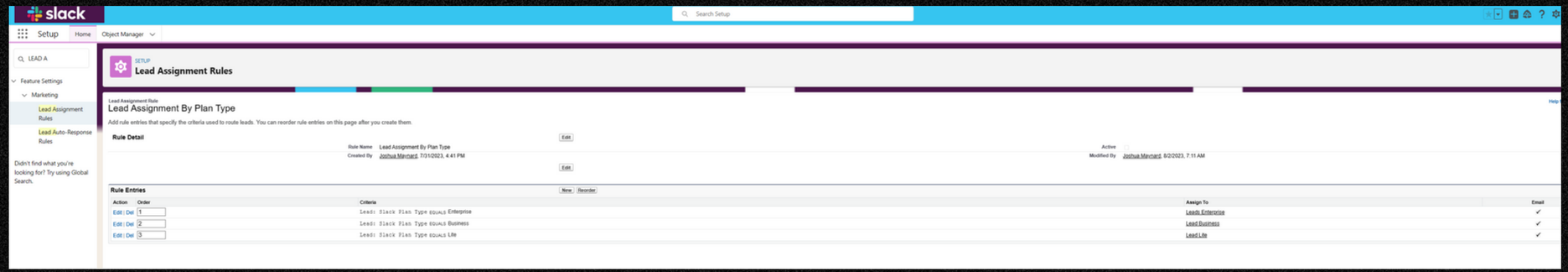
- Navigate to Lead Assignment Rules:
  - Go to Setup.
  - In the Quick Find box, type "Lead Assignment Rules".
  - Click on Lead Assignment Rules.

- Create a New Rule:
  - Click the New Rule button.
  - Enter a Rule Name.
  - Click Save.

- Define Rule Entries:
  - Click the name of the Rule you just created.
  - Under Rule Entries, Click New.
  - From here, the process is quite similar to STEP 5-C, which you've already completed. With that in mind, I recommend we take a break from this for a second. I bet you're tired of reading, and I KNOW that I am tired of writing. It's true! I just checked. Go watch something. Maybe snack on a banana. We'll pick things back up on Task 5-F.

we're in the endgame now

Example



TASK 5-F

Directive

Create an escalation rule for unresolved cases that have no recent update.

Implementation

WELCOME BACK!

- Go to Setup.
- In the Quick Find box, type "Escalation Rules".
- Click on Escalation Rules under Service.
- Create a New Escalation Rule:
- Click the New Rule button.
- Click Save.

Define Escalation Criteria:

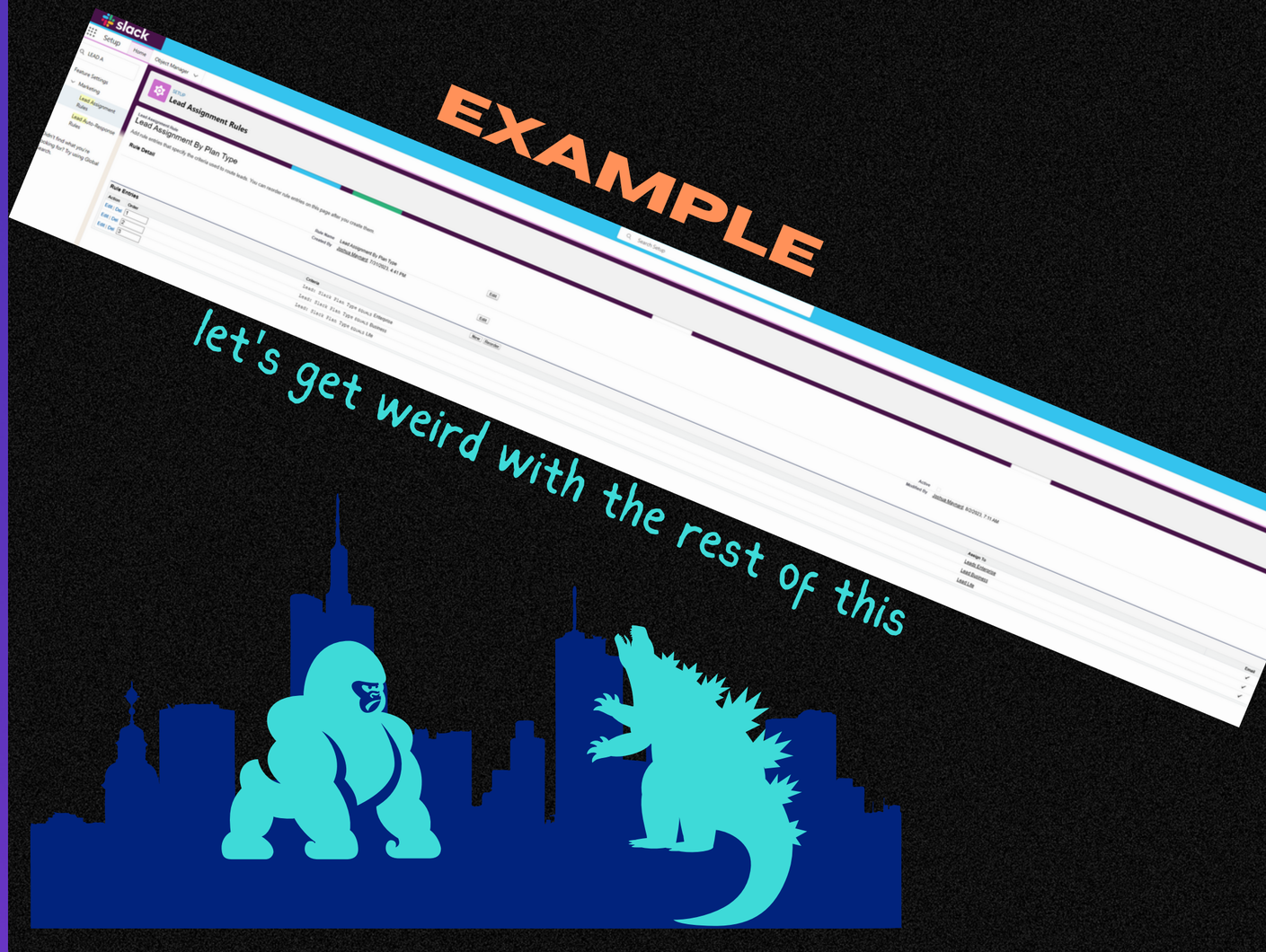
- After saving the rule, you'll be back on the Case Escalation Rules page. Click the name of the one you just created.
- Click New under "Rule Entries".
- Set the Sort Order.
- Define your criteria in the Case Criteria section. For example, to escalate cases after 30 minutes:
- Field: Case: Status
- Operator: equals
- Value: New

Click New under Escalation Actions

- Age Over field: 30
- Assign case to existing User or Queue.
- Select if you want to notify the case owner that this is happening.
- Select Notification Template.
- Click Save.

Activate the Rule:

- Return to the Escalation Rules list.
- Next to your rule, click Edit.
- Check the box for Active.
- Click Save.
- Test the Rule:
- Create a new case or modify an existing case such that it matches the escalation criteria you've set.
- Ensure the appropriate escalation actions are taken after the designated time passes.



TASK 5-G

Directive

Create a calculated formula field on a custom object.

Implementation

- Setup. > Object Manager

In the list of objects, find and click on the name of your custom object. For this we're gonna use "Account".

Use Case: Suppose you have an Account object and you want to calculate the number of years since the account was established, based on an Established_Date__c field.

- Create New Formula Field:
  - Click Fields & Relationships on the left pane.
  - Click the New button.
  - In the list of data types, select Formula and click Next.

- Define the Formula Field:
  - Field Label: Enter "Years Established".
  - Field Name: This might auto-populate as "Years_Established".
  - Formula Return Type: Choose "Number" with 0 decimal places.
  - Click Next.

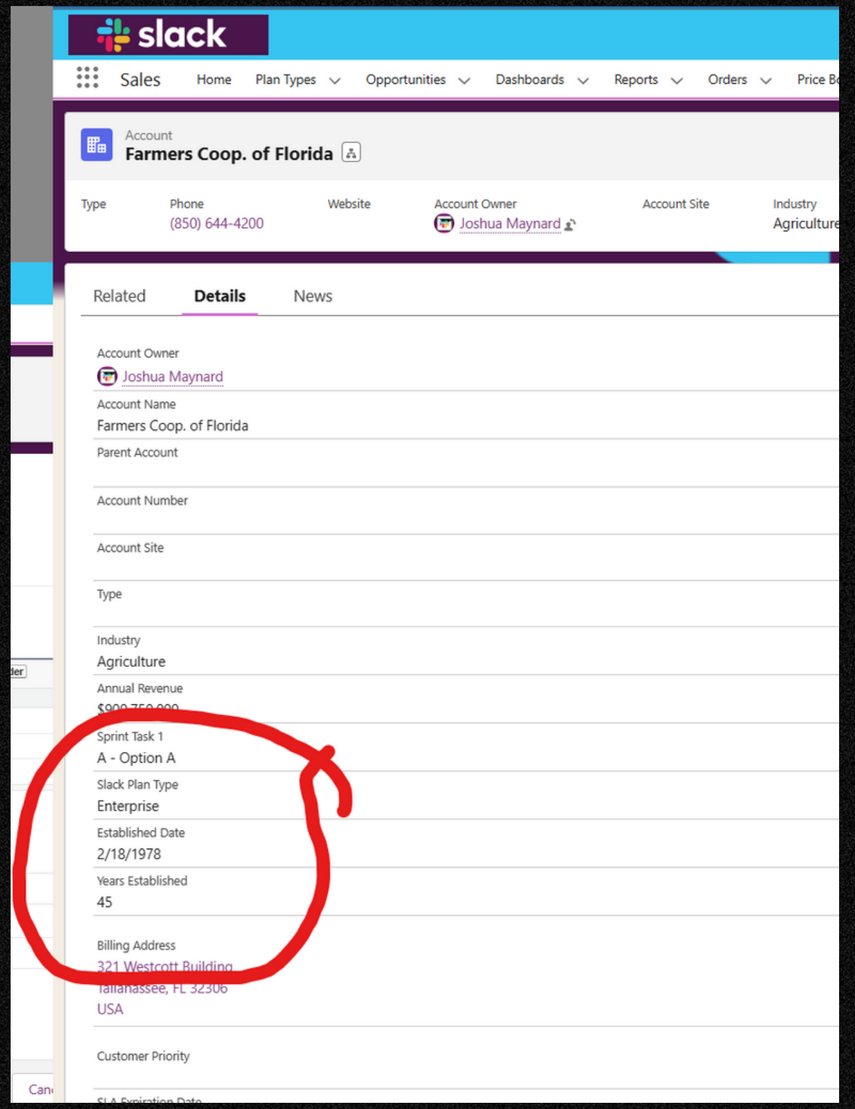
- Enter Formula Logic:
  - In the formula editor, you want to calculate the difference between the current year and the year the account was established.
  - Use the following formula: YEAR(TODAY()) - YEAR(Established_Date__c)
  - This formula subtracts the year of the Established_Date__c from the current year.
  - Use the Check Syntax button to ensure there are no errors in your formula.
  - Click Next.

- Set Field-Level Security:
  - By default, the new formula field may be visible to all profiles. Adjust visibility settings as needed.
  - Click Next.

- Add to Page Layouts:
  - Decide which page layouts should include the new "Years Established" formula field. By default, it may be added to all available page layouts.
  - Click Save.

This new field on the Account object will automatically display the number of years since the account was established, based on the criteria you set.

Example



TASK 5-H

Directive

Develop a flow that gathers required information and creates or updates contact records based on the provided information.

Implementation

Navigate to Flows:
- Go to Setup.
- In the Quick Find box, type “Flows”.
- Click Flows.

Start a New Screen Flow:
- Click the New Flow button.
- Choose Screen Flow and then click Create.

Design Your Screen:
- Drag and drop a Screen element from the toolbox onto the canvas.
- Label it, for instance, "Gather Contact Info".
- Add input components like Textboxes, Picklists, or Radio Buttons to collect the necessary data such as First Name, Last Name, Email, Phone, etc.

Search for Existing Contact:
- Drag and drop the Get Records element onto the canvas after the Screen element.
- Name it something like "Find Existing Contact".
- For the Object, select Contact.
- For the criteria, you might set it to search for Contacts with matching Emails or other unique identifiers.
- Set it to store the first record only (since Email or your unique identifier should be unique).

Make a Decision Based on the Search:
- Drag and drop the Decision element onto the canvas.
- Label it, for instance, "Contact Exists?".
- Define outcomes. For instance:
- "Existing Contact": If the Get Records element found a contact.
- "New Contact": If no records were found.

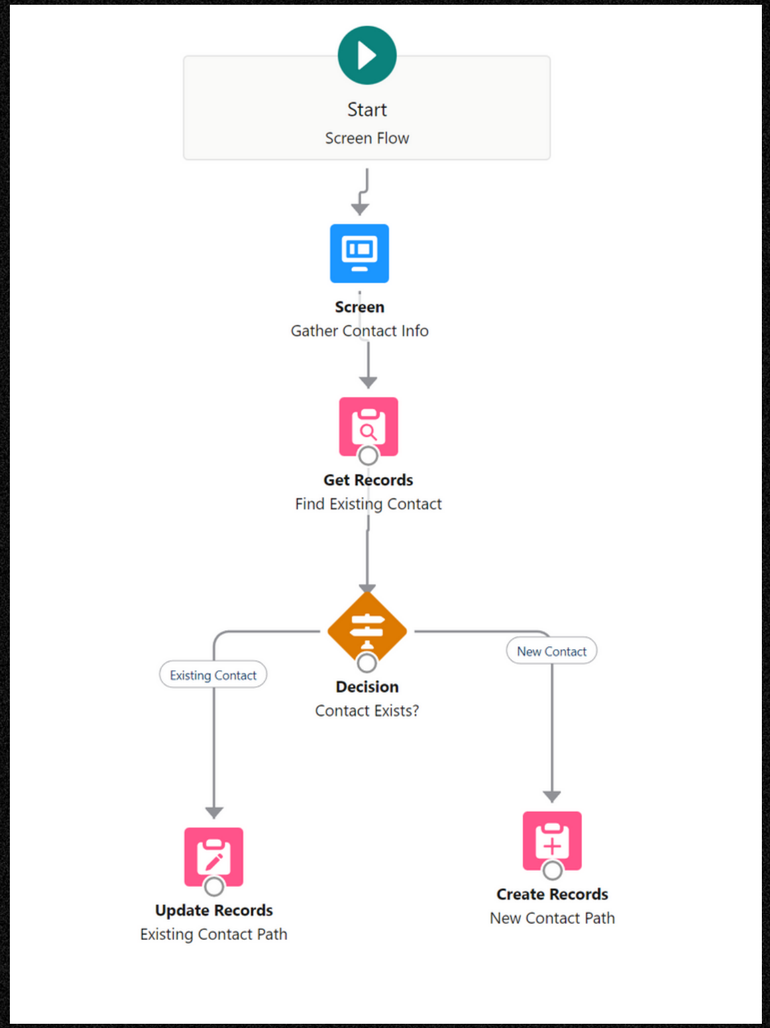
Update or Create Contact:
- For the "Existing Contact" path:
- Drag and drop the Update Records element onto the canvas.
- Choose the record you found earlier and set the new values based on the screen's inputs.
- For the "New Contact" path:
- Drag and drop the Create Records element onto the canvas.
- Set the object to Contact and set the values based on the screen's inputs.

Save and Finish:
- Click Save in the top right, give your flow a name and description.
- After saving, click Close.

Activate the Flow:
- Back in the list of Flows, find your new Flow.
- Click on it to get to the Flow detail page.
- Click Activate.

Embed or Link the Flow (optional):
- You might want to add this flow to a Lightning Page, a Visualforce page, or simply link to it from a button or a tab for users to access it.

Example



TASK 5-I

Directive

Create a Macro to automate taking ownership of a case in the Service Console.

Implementation

Prerequisites:

- Ensure your Salesforce org meets the required prerequisites for creating a macro.
- Macros in Lightning Experience are supported for most standard objects (excluding Campaign) and for custom objects that support quick actions and have customizable page layouts.
- The Macro utility must be added to your Lightning app by your admin.

Adding the Macro Utility to the Lightning App:

- Navigate to Setup.
- Go to Apps > App Manager.
- Locate and select the Lightning app you want to enhance.
- Click Edit.
- In the left panel, select Utility Items.
- Click Add Utility Item.
- From the available options, select Macro or the related utility item.
- Click Save.

Creating the Macro:

- Open the Service Console:
  - Ensure you're in the Service Console app within Salesforce.
  - If not, switch to it from the App Launcher.
- Access an Existing Case:
  - Within the Service Console, open any existing case to use as a template for recording the macro.
- Initiate Macro Creation:
  - Search for the Macros widget. If you can't see it, you might need to modify your Service Console layout (as guided above).
  - Press Create Macro.
- Provide Macro Details:
  - Name your macro, perhaps something like “Take Ownership of a Case”.
  - Enter a descriptive explanation.
  - Set the macro to apply to the CASE object.
- Save Macro:
  - Click Save.
- Edit Instructions:
  - In the upper right corner, click Edit Instructions.
- Add Macro Actions:
  - On the right side, select Add Instruction.
  - Click on Case Details on the left side.
  - Press the + sign.
  - On the right, pick the desired owner for the change in ownership.
  - On the left, press Save.
- Finalize Instructions:
  - On the right side, confirm your changes by clicking Save.
- Test the Macro:
  - Navigate back to the Case Page.
  - In the bottom left, locate the Macros widget and run the macro you've just created.

Result: You have successfully automated the process of taking ownership of a case using a macro in Salesforce Lightning! BOOOM

Example