

# Project 1

Team Amplifier Allstars

# Meet The Amplifier Allstars Squad!

Adam Baird

Austin McElrone

Desiree Morris

Quan Nguyen

Sam Preston

# Use Case

Create a custom Salesforce application based on business of our choosing.

Adam - A band that tours with other bands and sells merch

Quan - Music Entertainment Company

Austin - Health food retail store

[Desiree - Web Design Agency](#)

Sam - Electric Car manufacturer

# SDLC Practices - Scrumban

- Communicated using daily stand ups
  - Talked about road blocks, helped each other fix them
- 
- Maintained our own kanban project boards
  - Kept organized by: To Do, In Progress and Complete tasks

# Tools Used

## Entity Relationship Diagram (ERD):

Draw.io , Visual Paradigm, Microsoft Paint

## Salesforce Tools:

- Trailhead, Salesforce online forums, Salesforce tutorial videos

[skip to desiree's demo](#)

# Adam Baird - Data Model

Used an atypical model, focused more on networking aspect of a band

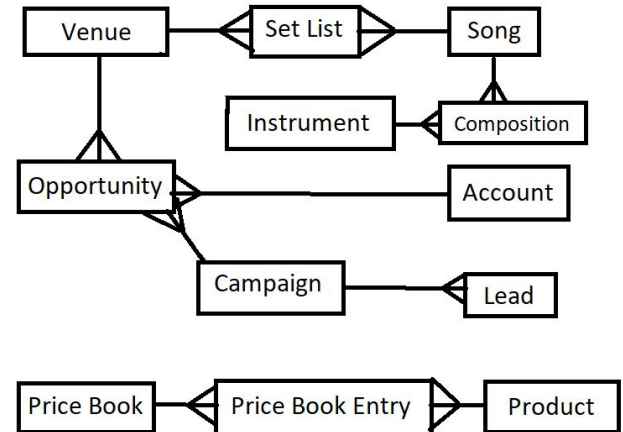
Leads are potential bands that we can play/tour with or collaborate with

- Brought in through our website or social media


Opportunities are bands that we already know and play with (accounts), give a chance to set up dates and times

Products include merch and tickets, sold online and at shows.

Sales people deal with individuals not accounts



# Adam - Products



Band Manager

HomeSongs Instruments Venues Opportunities Leads Accounts Contacts ProductsPrice Books

All

Search Products and more...

★


+

🔒

?

⚙️

🔔



Products

Recently Viewed



8 items • Updated a few seconds ago

Search this list...



New

# Adam - Web Price Book



All ▾

Search Price Books and more...



Band Manager

Home

Songs ▾

Instruments ▾

Venues ▾

Opportunities ▾

Leads ▾

Accounts ▾

Contacts ▾

Products ▾

Price Books ▾



Price Book

Web Prices

Edit

Clone

Delete

Related

Details



Price Book Entries (6+)

Add Products

| Product Name                      | Product Code | List Price | Active                              |   |
|-----------------------------------|--------------|------------|-------------------------------------|---|
| <a href="#">Button</a>            | D-03         | USD 5.00   | <input checked="" type="checkbox"/> | ▾ |
| <a href="#">Greatest Covers 1</a> | CD-01        | USD 25.00  | <input checked="" type="checkbox"/> | ▾ |
| <a href="#">Greatest Covers 2</a> | CD-02        | USD 30.00  | <input checked="" type="checkbox"/> | ▾ |
| <a href="#">Men's T-Shirt</a>     | C-01         | USD 40.00  | <input checked="" type="checkbox"/> | ▾ |
| <a href="#">Poster</a>            | D-01         | USD 30.00  | <input checked="" type="checkbox"/> | ▾ |
| <a href="#">Sticker</a>           | D-02         | USD 1.00   | <input checked="" type="checkbox"/> | ▾ |

[View All](#)




Price Book History (1)

| Date               | Field    | User                       | Original Value | New Value |   |
|--------------------|----------|----------------------------|----------------|-----------|---|
| 3/31/2022, 5:54 PM | Created. | <a href="#">Adam Baird</a> |                |           | ▾ |








[View All](#)




# Adam - Show Price Book



All ▾ 🔍 Search Price Books and more...



 Band Manager

Home

Songs ▾

Instruments ▾

Venues ▾

Opportunities ▾


Leads ▾

Accounts ▾

Contacts ▾

Products ▾

**Price Books ▾**


 Price Book

**Show Prices**

EditCloneDelete


Related

Details

 Price Book Entries (6+)

Add Products

| Product Name                      | Product Code | List Price | Active                              |   |
|-----------------------------------|--------------|------------|-------------------------------------|---|
| <a href="#">Button</a>            | D-03         | USD 8.00   | <input checked="" type="checkbox"/> | ▾ |
| <a href="#">Greatest Covers 1</a> | CD-01        | USD 35.00  | <input checked="" type="checkbox"/> | ▾ |
| <a href="#">Greatest Covers 2</a> | CD-02        | USD 40.00  | <input checked="" type="checkbox"/> | ▾ |
| <a href="#">Men's T-Shirt</a>     | C-01         | USD 60.00  | <input checked="" type="checkbox"/> | ▾ |
| <a href="#">Poster</a>            | D-01         | USD 45.00  | <input checked="" type="checkbox"/> | ▾ |
| <a href="#">Sticker</a>           | D-02         | USD 2.00   | <input checked="" type="checkbox"/> | ▾ |
| <a href="#">View All</a>          |              |            |                                     |   |

 Price Book History (1)

| Date                     | Field    | User                       | Original Value | New Value |   |
|--------------------------|----------|----------------------------|----------------|-----------|---|
| 3/31/2022, 5:52 PM       | Created. | <a href="#">Adam Baird</a> |                |           | ▾ |
| <a href="#">View All</a> |          |                            |                |           |   |

# Adam - Case Rules

## Case Assignment Rules

| Rule Entries                               |                                |   |                                      |                          |
|--|--------------------------------|---|--------------------------------------|--------------------------|
|  |                                | <a href="#">New</a> <a href="#">Reorder</a> |                                      |                          |
| Action                                     | Order                          | Criteria                                    | Assign To                            | Email                    |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="1"/> | Case: Type EQUALS Bought at Show            | <a href="#">Merch Bought at Show</a> | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="2"/> | Case: Type EQUALS Bought Online             | <a href="#">Merch Bought Online</a>  | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="3"/> | Case: Type EQUALS Tickets                   | <a href="#">Tickets Cases</a>        | <input type="checkbox"/> |

## Case Escalation Rules

| Rule Entries                               |                                |   | <a href="#">New</a> <a href="#">Reorder</a> |  | <a href="#">Rule Entries Help</a> <a href="#">?</a> |
|--|--------------------------------|---|---|--|---|
| Action                                     | Order                          | Criteria  |   |  |   |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="1"/> | (Case: Priority EQUALS High) AND (Product: Product Name EQUALS Tickets)   |   |  |   |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="2"/> | (Case: Priority EQUALS Medium) AND (Product: Product Name EQUALS Tickets) |   |  |   |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="3"/> | (Case: Priority EQUALS Low) AND (Product: Product Name EQUALS Tickets)    |   |  |   |

# Adam - Lead Assignment Rules

| Rule Entries                                |                                |  |                                     |                          |
|---|--------------------------------|--|-------------------------------------|--------------------------|
| <a href="#">New</a> <a href="#">Reorder</a> |                                |  |                                     |                          |
| Action                                      | Order                          | Criteria   | Assign To                           | Email                    |
| <a href="#">Edit</a>   <a href="#">Del</a>  | <input type="text" value="1"/> | Lead: Country NOT EQUAL TO United States of America  | <a href="#">International Bands</a> | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a>  | <input type="text" value="2"/> | AND(<br>CASE(<br>State,<br>"Alaska", 1,<br>"Hawaii", 1,<br>"California", 1,<br>"Oregon", 1,<br>"Washington", 1,<br>"Idaho", 1,<br>"Montana", 1,<br>"Wyoming", 1,<br>"Nevada", 1,<br>"Utah", 1,<br>"Colorado", 1,<br>"Arizona", 1,<br>"New Mexico", 1,<br>0<br>) = 1<br>) | <a href="#">Western Bands</a>       | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a>  | <input type="text" value="3"/> | AND(<br>CASE(<br>State,<br>"Alaska", 0,<br>"Hawaii", 0,<br>"California", 0,<br>"Oregon", 0,<br>"Washington", 0,<br>"Idaho", 0,<br>"Montana", 0,<br>"Wyoming", 0,<br>"Nevada", 0,<br>"Utah", 0,<br>"Colorado", 0,<br>"Arizona", 0,<br>"New Mexico", 0,<br>1<br>) = 1<br>) | <a href="#">Eastern Bands</a>       | <input type="checkbox"/> |

# Adam - Web to Lead and Web to Case

Show in notepad

# Adam - Case Paths

▼

New

Working

Escalated

Closed

Status: New

✓ Mark Status as Complete

Key Fields

Case Number

00001028

Case Reason

Contact Name


[Joseph Smith](#)

Edit


Guidance for Success

Begin by making contact by email.

# Adam - Opportunity Path

 Opportunity

**Schedule a show with Ashes of Billy**

[+ Follow](#) [Edit](#) [New Contact](#) [New Opportunity](#) 

Account Name



Close Date


Amount


Opportunity Owner

[Ashes of Billy](#)

4/17/2022

 [Adam Baird](#) 





**Concert Planning**

Location Planning

Negotiation/Review

Closed

[✓ Mark Stage as Complete](#)

**Key Fields**

Account Name

[Ashes of Billy](#)

Close Date

4/17/2022

Next Step

Call to find out availability, venue suggestions

Probability (%)

40%

Description

**Edit**

**Guidance for Success**

Use main point of contact to reach out and determine band's upcoming availability for touring and which cities they're interested in playing in. Suggest venues and take venue suggestions.

# Adam - Live Demo

Custom App

Page Layouts

Quick Actions

Security

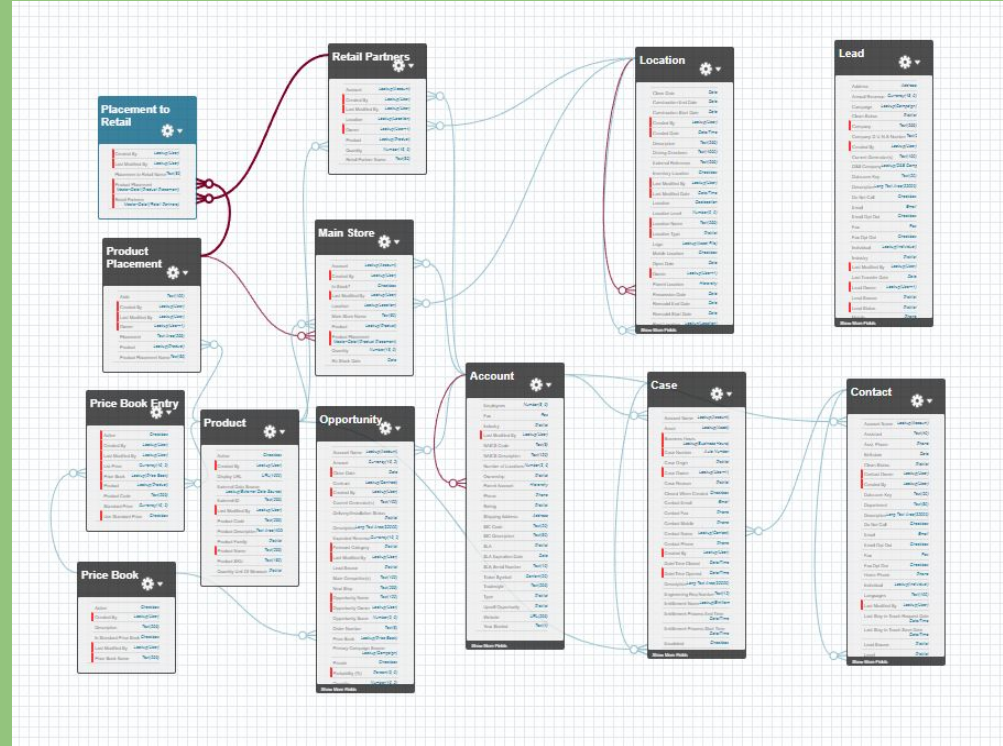
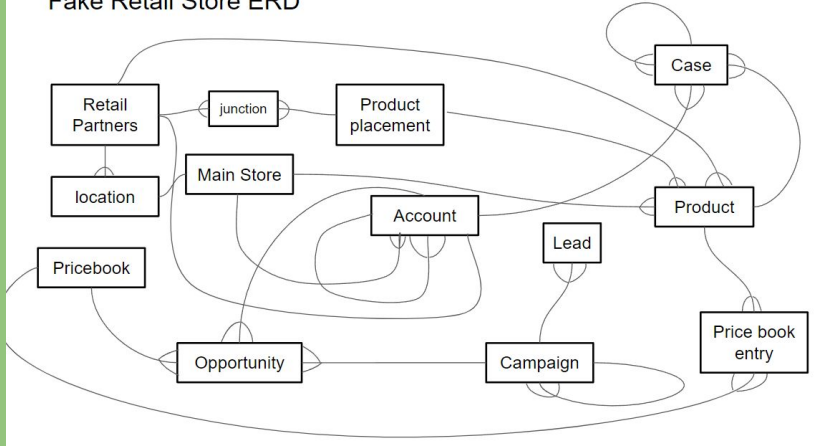
Flows

Dashboard

# Austin McElrone

## Health Foods Retail Store

Fake Retail Store ERD





# Rules

## Case Escalation rule

| Rule Entries                               |                                |                             | <a href="#">New</a> | <a href="#">Reorder</a> |
|--|--------------------------------|-----------------------------|---------------------|-------------------------|
| Action                                     | Order                          | Criteria                    |                     |                         |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="1"/> | Case: Status EQUALS Working |                     |                         |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="2"/> | Case: Priority EQUALS Low   |                     |                         |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="3"/> | Case: Priority EQUALS High  |                     |                         |

## Case Assignment Rule

| Rule Entries                               |                                |                              |                            | <a href="#">New</a> | <a href="#">Reorder</a> |
|--|--------------------------------|------------------------------|----------------------------|---------------------|-------------------------|
| Action                                     | Order                          | Criteria                     | Assign To                  |                     |                         |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="1"/> | Case: Status EQUALS Working  | <a href="#">User_Sales</a> |                     |                         |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="2"/> | Case: Case Origin EQUALS Web | <a href="#">User_Sales</a> |                     |                         |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="3"/> | Case: Priority EQUALS Medium | <a href="#">User_Sales</a> |                     |                         |

## Lead Assignment Rule

| Rule Entries                               |                                |  |  |                            |
|--|--------------------------------|--|--|----------------------------|
|  |                                | <a href="#">New</a> <a href="#">Reorder</a>  |  |                            |
| Action                                     | Order                          | Criteria                                     |  | Assign To                  |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="1"/> | Lead: Company EQUALS Walmart                 |  | <a href="#">User Sales</a> |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="2"/> | Lead: State/Province EQUALS CA,NV,AZ,WA,OR   |  | <a href="#">User Sales</a> |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="3"/> | Lead: Lead Status EQUALS Working - Contacted |  | <a href="#">User Sales</a> |

## Sharing Rules

| Account Sharing Rules                      |  |   |                      |  |           |
|--|--|---|----------------------|--|-----------|
|  |  | <a href="#">New</a> <a href="#">Recalculate</a> |                      | <a href="#">Account Sharing Rules Help</a> <a href="#">?</a> |           |
| Action                                     | Criteria   | Shared With                                     | Account and Contract | Opportunity  | Case      |
| <a href="#">Edit</a>   <a href="#">Del</a> | Owner in <a href="#">Role: SVP Sales &amp; Marketing</a>           | <a href="#">Group: Sales Group</a>              | Read Only            | Private  | Private   |
| <a href="#">Edit</a>   <a href="#">Del</a> | Owner in <a href="#">Role: VP North American Sales</a>             | <a href="#">Group: Sales Group</a>              | Read Only            | Private  | Private   |
| <a href="#">Edit</a>   <a href="#">Del</a> | Owner in <a href="#">Role and Subordinates: Western Sales Team</a> | <a href="#">Group: Sales Group</a>              | Read Only            | Read Only  | Read Only |

# Web - to - Case/Lead enabled

## Web-to-Case Settings

Use a simple web form or a self-service customer community to make it easy for customers to create cases. For detailed information on setting up Web-to-Case or Self-Service Community templates, see the documentation.

### Basic Settings

Enable Web-to-Case ☒ [i](#)

Require reCAPTCHA Verification ☐ [i](#)

Default Case Origin Web [i](#)

## Web-to-Lead Settings

Web-to-Lead Enabled ☒

Require reCAPTCHA Verification ☐

Default Lead Creator Austin McElrone

Default Response Template

# Products and Pricebooks

## Products

| Products   |                                     |              |
|--|-------------------------------------|--------------|
| All Products ▼   |                                     |              |
| 3 items • Sorted by Product Name • Filtered by All products - Active (Product) • Updated a few seconds ago |                                     |              |
| <input type="checkbox"/>   | Product Name ↑                      | Product Code |
| 1  | <a href="#">Fake Meal-Prep</a>      | FMP106       |
| 2  | <a href="#">Fake Protein Powder</a> | FPP105       |
| 3  | <a href="#">Fake Sweatshirt</a>     | FSA107       |

## Wholesale Pricebook

| Price Book                          |              |                          |
|-------------------------------------|--------------|--------------------------|
| Wholesale Price book                |              |                          |
| Related Details                     |              |                          |
| Price Book Entries (3)              |              |                          |
| Product Name                        | Product Code | List Price               |
| <a href="#">Fake Meal-Prep</a>      | FMP106       | \$3.00                   |
| <a href="#">Fake Protein Powder</a> | FPP105       | \$30.00                  |
| <a href="#">Fake Sweatshirt</a>     | FSA107       | \$20.00                  |
|                                     |              | <a href="#">View All</a> |

## Pricebook

| Price Books                         |                                      |  |                    |                                     |
|-------------------------------------|--------------------------------------|--|--------------------|-------------------------------------|
| Recently Viewed ▼                   |                                      |  |                    |                                     |
| 4 items • Updated a few seconds ago |                                      |  |                    |                                     |
| Search this list...                 |                                      |  |                    |                                     |
| <input type="checkbox"/>            | Price Book Name                      | Description                              | Last Modified Date | Active                              |
| 1                                   | <a href="#">Wholesale Price book</a> | wholesale prices for our retail partners | 4/5/2022, 11:52 AM | <input checked="" type="checkbox"/> |
| 2                                   | <a href="#">Retail Price book</a>    |  | 4/5/2022, 11:52 AM | <input checked="" type="checkbox"/> |
| 3                                   | <a href="#">Standard Price Book</a>  |  | 4/4/2022, 1:48 PM  | <input checked="" type="checkbox"/> |
| 4                                   | <a href="#">Standard</a>             |  | 4/4/2022, 1:48 PM  | <input type="checkbox"/>            |



# Live Demo

Screen flow

global action

Object action

Retail app

Reports, dashboards

Security

# Web Design Agency

- ### Project 1 ERD
- Desi Quinn Creative  
Web Design Agency
- 
- The diagram is an Entity-Relationship Diagram (ERD) for Desi Quinn Creative Web Design Agency. It features several entities represented by colored rounded rectangles: Campaign (blue), Lead (purple), Sales Call (blue), Proposal (Sent / Not Accepted) (blue), Price Book (orange), Product (Service) (orange), Case (red), Project (green), Contract (green), Payment (Invoice) (green), Order (Accepted Proposal) (green), and Account - Client (purple). Relationships are indicated by dashed lines with crow's foot notation. Key relationships include: Campaign to Lead (1:M), Campaign to Sales Call (1:M), Lead to Sales Call (1:M), Sales Call to Proposal (1:M), Proposal to Case (1:M), Case to Project (1:M), Project to Account - Client (1:M), Account - Client to Order (1:M), Order to Contract (1:M), Order to Payment (1:M), Order to Product (Service) (1:M), and Product (Service) to Price Book (1:M). There are also self-referencing relationships on Case and Project entities.



# Service Cloud

- Customized case object for DQC
- Created 3 Assignment rules
- Created 3 Escalation Rules
- Web-to-Case Link
  - <click this link when ready>
- Email-to-Case Email
  - dqcspprt@gmail.com

Case Reason Picklist Values

New Reorder Replace Printable View Chart Col

| Action  | Values           | API Name         | Available in Self-Service | Default                             |
|---|------------------|------------------|---------------------------|-------------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Technical Issue  | Technical_Issue  | <input type="checkbox"/>  | <input type="checkbox"/>            |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Update Content   | Update_Content   | <input type="checkbox"/>  | <input type="checkbox"/>            |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | General Question | General_Question | <input type="checkbox"/>  | <input checked="" type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Project Inquiry  | Project_Inquiry  | <input type="checkbox"/>  | <input type="checkbox"/>            |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Feedback         | Feedback         | <input type="checkbox"/>  | <input type="checkbox"/>            |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Other            | Other            | <input type="checkbox"/>  | <input type="checkbox"/>            |

URL Of Issue

URL\_Of\_Issue\_\_c

URL(255)

Account Success Technical Support Webmaster

New

| Action                                     | Label ↑                           | Queue Name                        | Queue Email | Supported Objects |
|--|-----------------------------------|-----------------------------------|-------------|-------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">Account Success</a>   | <a href="#">Account_Success</a>   |             | Case              |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">Technical Support</a> | <a href="#">Technical_Support</a> |             | Case              |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">Webmaster</a>         | <a href="#">Webmaster</a>         |             | Case              |

Rule Entries

New Reorder

| Action                                     | Order                          | Criteria                        |
|--|--------------------------------|---------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="1"/> | Case: Status NOTEQUAL TO Closed |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="2"/> | Case: Status NOTEQUAL TO Closed |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="3"/> | Case: Status EQUALS Escalated   |



# Desiree Morris

Desi Quinn Creative Web Design Agency

# Questions?

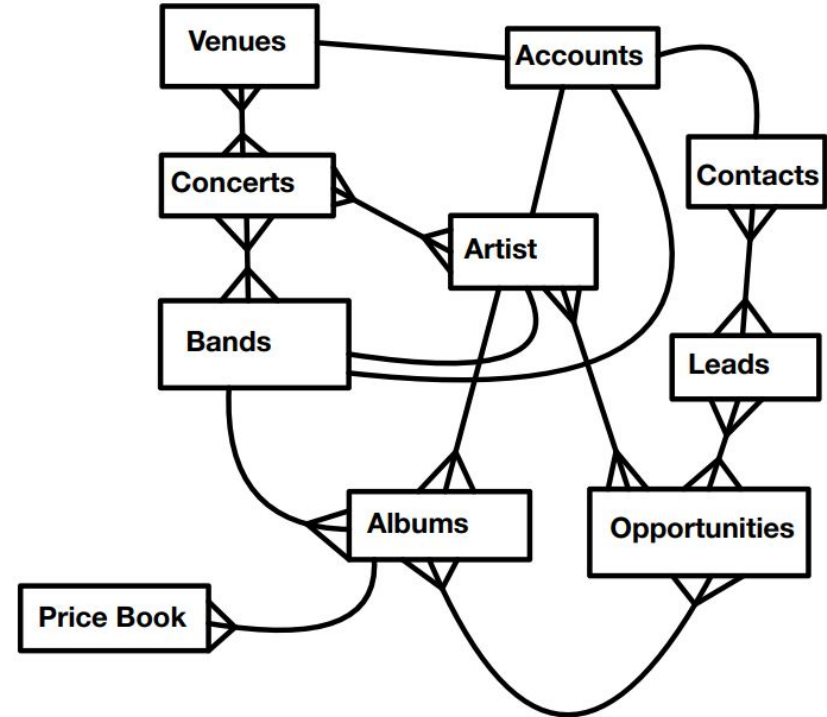
# Quan - Demo

## Monster Music Entertainment

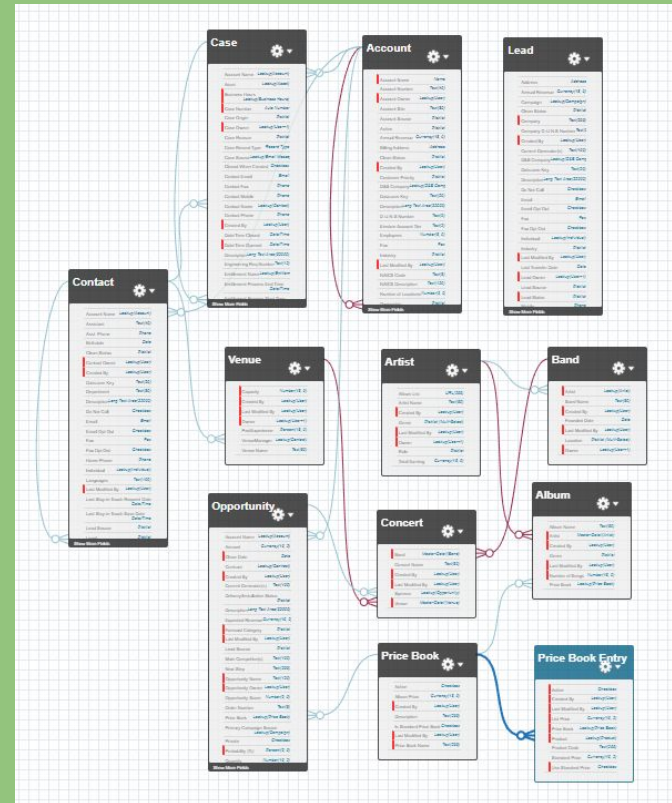
The ERD shows basic structure of the company and its partners.

Leads are individuals who want to join our org and large album sale potential customers

Concerts are another revenue-driven object where artists and bands can apply to join so as Venues offer to hold the concert.



# Quan - Organization Data Model



# Quan - Albums and Price Books

## Albums

### Album List

[New](#) [Import](#) [Printable View](#)

4 items • Sorted by Album Name • Filtered by My albums • Updated a few seconds ago

Q Search this list...



| <input type="checkbox"/> | Album Name ↑   | Artist                           | Genre | Price Book                         |   |
|--------------------------|--|----------------------------------|-------|------------------------------------|---|
| 1                        | <input type="checkbox"/> <a href="#">Conquer The World</a> | <a href="#">Steven Markeruth</a> | Pop   | <a href="#">Conquer The World</a>  | ▼ |
| 2                        | <input type="checkbox"/> <a href="#">Louisiana Great</a>   | <a href="#">Miles Davis</a>      | Jazz  | <a href="#">Louisiana Great</a>    | ▼ |
| 3                        | <input type="checkbox"/> <a href="#">Street Life</a>       | <a href="#">Snoop Cat</a>        | Rap   | <a href="#">Street Life Album</a>  | ▼ |
| 4                        | <input type="checkbox"/> <a href="#">ThunderStorm</a>      | <a href="#">Anthony Davis</a>    | Rock  | <a href="#">Thunderstorm Album</a> | ▼ |

## Price Books

### Price Book List

[New](#) [Printable View](#)

6 items • Sorted by Price Book Name • Filtered by All price books - Active • Updated a few seconds ago

Q Search this list...



| <input type="checkbox"/> | Price Book Name ↑  | Active                              | Description                                    | Album Price |   |
|--------------------------|--|-------------------------------------|--|-------------|---|
| 1                        | <input type="checkbox"/> <a href="#">Conquer The World</a>     | <input checked="" type="checkbox"/> | Price for Conquer the World album              | \$500       | ▼ |
| 2                        | <input type="checkbox"/> <a href="#">Louisiana Great</a>       | <input checked="" type="checkbox"/> | Price a Louisiana Great album                  | \$2,500     | ▼ |
| 3                        | <input type="checkbox"/> <a href="#">Mike Davis Night Show</a> | <input checked="" type="checkbox"/> | Minimum Payment to offer Mike Davis to perform | \$30,000    | ▼ |
| 4                        | <input type="checkbox"/> <a href="#">Snoop Cat Night Show</a>  | <input checked="" type="checkbox"/> | Minimum Payment to offer Snoop Cat to perform  | \$10,000    | ▼ |
| 5                        | <input type="checkbox"/> <a href="#">Street Life Album</a>     | <input checked="" type="checkbox"/> | Price for Street Life Album                    | \$500       | ▼ |
| 6                        | <input type="checkbox"/> <a href="#">Thunderstorm Album</a>    | <input checked="" type="checkbox"/> | Price for Thunderstorm album                   | \$1,200     | ▼ |

# Quan - Case Assignment and Escalation

## Case Assignment Rule

### Product Support

[Help for this Page](#)

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 Product Support

Active ☐

Created By [Quan Nguyen](#), 4/3/2022, 9:00 PM

Modified By [Quan Nguyen](#), 4/5/2022, 1:16 PM

[Edit](#)

#### Rule Entries

[New](#) [Reorder](#)

| Action                                     | Order                          | Criteria   | Assign To                          | Email                    |
|--|--------------------------------|--|------------------------------------|--------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="1"/> | (Case: Subject CONTAINS Shipping) AND (Case: Case Reason EQUALS Performance) | <a href="#">Shipping Cases</a>     | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="2"/> | Case: Subject CONTAINS Refund  | <a href="#">Refund Cases Queue</a> | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="3"/> | Case: Case Record Type EQUALS Product Support                                | <a href="#">Support Case</a>       | <input type="checkbox"/> |

## Case Escalation Rule

### Immediate Support

[Help for this Page](#)

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

#### Rule Detail

[Edit](#)

Rule Name Immediate Support

Active ☒

Created By [Quan Nguyen](#), 4/3/2022, 9:52 PM

Modified By [Quan Nguyen](#), 4/5/2022, 1:24 PM

[Edit](#)

#### Rule Entries

[New](#) [Reorder](#)[Rule Entries Help](#) [?](#)

| Action                                     | Order                          | Criteria  |
|--|--------------------------------|---|
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="1"/> | Case: Priority EQUALS High                                    |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="2"/> | Case: Case Record Type EQUALS Product Support.Billing Support |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="3"/> | Case: Escalated EQUALS True                                   |

# Quan - Email to Case

## Email-to-Case Routing Information

[< Email-to-Case Setup](#)

### Email Address Detail

[Edit](#)[Delete](#)[Clone](#)

### Routing Information

|               |   |             |   |
|---------------|---|-------------|---|
| Source        | Email2Case                                      |             |   |
| Routing Name  | Product Support Case                            |             |   |
| Email Address | <a href="#">[redacted].gmail.com</a> [ Verify ] |             |   |
| Created By    | <a href="#">Quan Nguyen</a> , 4/4/2022, 8:49 PM | Modified By | <a href="#">Quan Nguyen</a> , 4/4/2022, 8:49 PM |

### Email Settings

Save Email Headers ☐

Accept Email From

### Task Settings

Create Task from Email ☐

Task Status Not Started

### Case Settings

Case Owner [Support Case](#)

Case Priority Medium

Case Origin Email

Case Record Type Product Support

[Edit](#)[Delete](#)[Clone](#)

# Quan - Lead Assignment Rules

Lead Assignment Rule

## Application and Product Sale

[Help for this Page](#)

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

### Rule Detail

[Edit](#)

Rule Name Application and Product Sale

Active ☒

Created By [Quan Nguyen](#), 4/3/2022, 4:31 PM

Modified By [Quan Nguyen](#), 4/5/2022, 1:55 PM

[Edit](#)

### Rule Entries

[New](#) [Reorder](#)

| Action                                     | Order                          | Criteria                         | Assign To                         | Email                    |
|--|--------------------------------|----------------------------------|-----------------------------------|--------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="1"/> | Lead: Title CONTAINS Application | <a href="#">Artist Recruiting</a> | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="2"/> | Lead: Title CONTAINS Albums      | <a href="#">Sale Oppty.</a>       | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a> | <input type="text" value="3"/> | Lead: Title CONTAINS Licenses    | <a href="#">License Oppty.</a>    | <input type="checkbox"/> |

# Quan - Web to Lead

## Web-to-Lead Settings

Save Cancel

### Web-to-Lead Settings

Enable your organization to receive online leads.

Web-to-Lead Enabled ☒

To reduce spam, require reCAPTCHA verification for customers' requests. When enabled, requests without verification don't generate leads. After enabling, confirm that your HTML includes the reCAPTCHA information.

Require reCAPTCHA Verification ☐

The user who will be listed as Creator when a Lead is created online.

Default Lead Creator  

Use Lead Auto-Response Rules to select different email response templates based on attributes of the leads submitted online. Leads not matching any of the rules will be sent the default response template selected below.

Default Response Template  

Save Cancel



# Quan - Web to Lead

Text Email Template

## GratitudeResponse

Preview your email template below.

### Email Template Detail

Edit Delete Clone

Email Templates from Salesforce

Unfiled Public Classic Email Templates

Email Template Name

GratitudeResponse

Template Unique Name

GratitudeResponse

Encoding

Unicode (UTF-8)

Author

[Quan Nguyen](#) [\[Change\]](#)

Description

Created By

[Quan Nguyen](#), 4/5/2022, 2:03 PM

Edit Delete Clone

### Email Template

Send Test and Verify Merge Fields

Subject | No Reply

Plain Text Preview

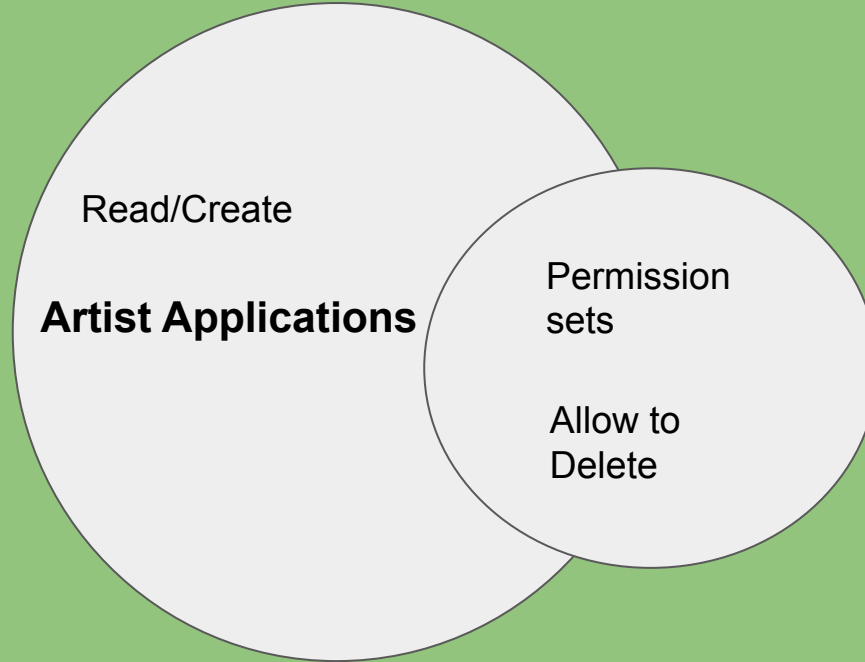
Thank you for submitting the form!  
We will contact you as soon as possible.

Regards,  
Monster Music Entertainment

# Quan - Security (Profiles)

Band Leaders

HR Team grants **Artist Information**  
profile



# Quan - Security (Profiles and Permission Sets)

Album Marketing Team

Artists in the Band

## Custom Object Permissions

|         | Basic Access                        |                                     |                                     |                                     | Data Administration                 |                                     |
|---------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
|         | Read                                | Create                              | Edit                                | Delete                              | View All                            | Modify All                          |
| Albums  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Artists | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Bands   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

# Quan - Security (Record Level)

## Sharing Rules

| Opportunity Sharing Rules                  |  |                     |                             | <a href="#">Opportunity Sharing Rules Help</a> ? |
|--|--|---------------------|-----------------------------|--|
|  |  | <a href="#">New</a> | <a href="#">Recalculate</a> |  |
| Action                                     | Criteria   | Shared With         |                             | Opportunity                                      |
| <a href="#">Edit</a>   <a href="#">Del</a> | Opportunity: Opportunity Name CONTAINS Forming Bands | All Internal Users  |                             | Read Only  |

| Artist Sharing Rules                       |                             |                                   |                             | <a href="#">Artist Sharing Rules Help</a> ? |
|--|-----------------------------|-----------------------------------|-----------------------------|---|
|  |                             | <a href="#">New</a>               | <a href="#">Recalculate</a> |   |
| Action                                     | Criteria                    | Shared With                       |                             | Access Level                                |
| <a href="#">Edit</a>   <a href="#">Del</a> | Owner in All Internal Users | <u>Role: SVP, Human Resources</u> |                             | Read/Write                                  |

| Band Sharing Rules          |  |                     |                             | <a href="#">Band Sharing Rules Help</a> ? |
|-----------------------------|--|---------------------|-----------------------------|---|
|                             |  | <a href="#">New</a> | <a href="#">Recalculate</a> |   |
| No sharing rules specified. |  |                     |                             |   |

| Venue Sharing Rules                        |                             |                     |                             | <a href="#">Venue Sharing Rules Help</a> ? |
|--|-----------------------------|---------------------|-----------------------------|--|
|  |                             | <a href="#">New</a> | <a href="#">Recalculate</a> |  |
| Action                                     | Criteria                    | Shared With         |                             | Access Level                               |
| <a href="#">Edit</a>   <a href="#">Del</a> | Owner in All Internal Users | <u>Role: COO</u>    |                             | Read Only                                  |

# Quan - Security (Field Level)

Permission Set  
WholeSale Buyer

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Accounts

Accounts Save Cancel

Object Permissions

| Permission Name | Enabled                             |
|-----------------|-------------------------------------|
| Read            | <input checked="" type="checkbox"/> |
| Create          | <input checked="" type="checkbox"/> |
| Edit            | <input type="checkbox"/>            |
| Delete          | <input type="checkbox"/>            |

|                 |                                     |                          |
|-----------------|-------------------------------------|--------------------------|
| Annual Revenue  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Billing Address | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Industry        | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

|                    |                                     |                          |
|--------------------|-------------------------------------|--------------------------|
| Tradestyle         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Type               | <input type="checkbox"/>            | <input type="checkbox"/> |
| Upsell Opportunity | <input type="checkbox"/>            | <input type="checkbox"/> |
| Website            | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Year Started       | <input type="checkbox"/>            | <input type="checkbox"/> |

# Quan - Demo

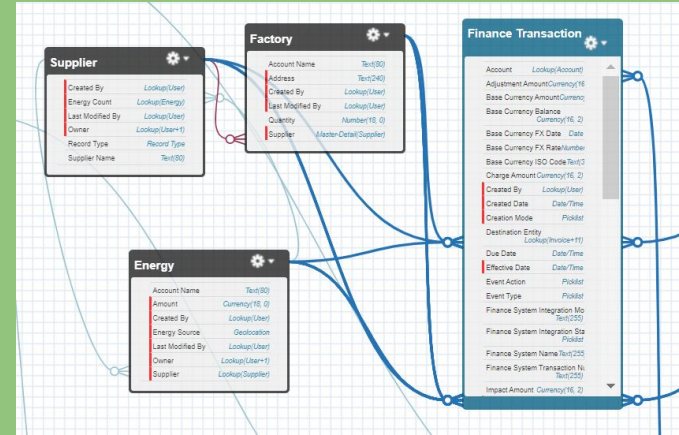
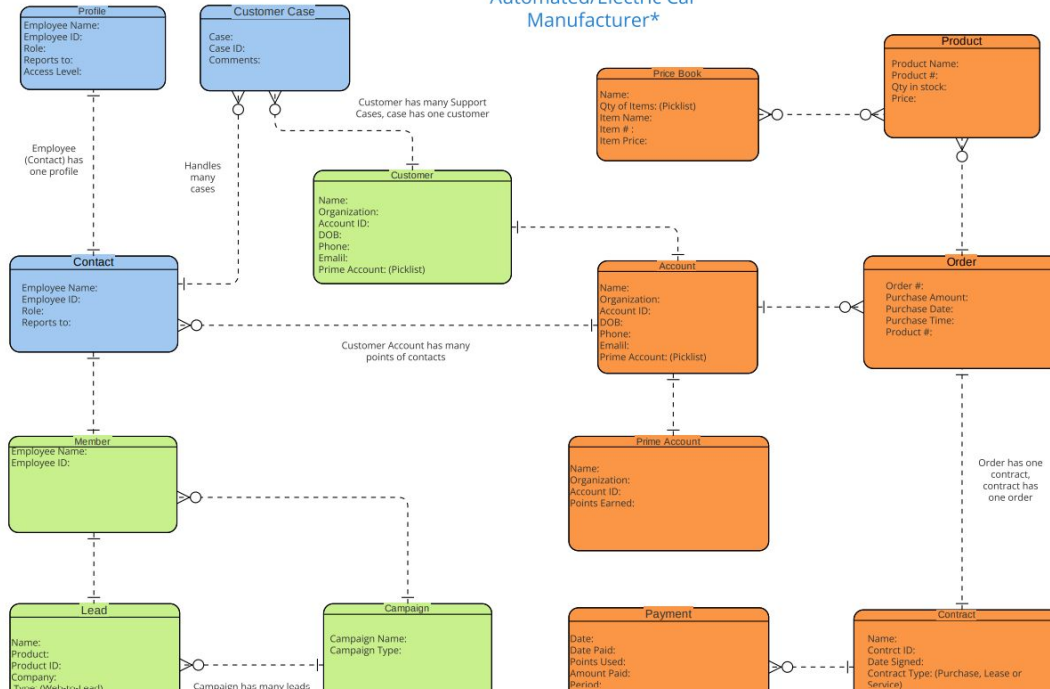
- Opportunity Path
- Case Path
- Custom App
- Object-specific quick action and global action
- Screen Flow
- Reports and dashboards

Acculent Inc.      founder: Sam Preston











# Data Organization Model

\*ERD for  
Automated/Electric Car  
Manufacturer\*






# Sales Cloud: Products

| <div><div> Products</div><div><b>All Products</b> ▼ </div></div> |   |                  |  |                  | <div><div>New</div><div>Printable View</div></div>   |  |
|---|---|------------------|--|------------------|--|--|
| 13 items • Sorted by Product Code • Filtered by All products • Updated 12 minutes ago   |   |                  |  |                  | <div><div><input type="text" value="Search this list..."/></div><div>     </div></div> |  |
|   | <input type="checkbox"/> Product Name ▼                           | Product Code ↑ ▼ | Product Description ▼  | Product Family ▼ |  |  |
| 1   | <input type="checkbox"/> <a href="#">G Series</a>                 | G001             | G series SUV. Equipped with standard tires & base custom features.         |                  | ▼  |  |
| 2   | <input type="checkbox"/> <a href="#">G Series Tire</a>            | G002             | Tires made to fit the G series SUV   |                  | ▼  |  |
| 3   | <input type="checkbox"/> <a href="#">G Series Battery</a>         | G003             | Battery for the G series sedan   |                  | ▼  |  |
| 4   | <input type="checkbox"/> <a href="#">Red Leather Seats</a>        | R001             | Red Leather Interior Seats   |                  | ▼  |  |
| 5   | <input type="checkbox"/> <a href="#">Dark Brown Leather Seats</a> | R002             | Dark Brown Leather Seats   |                  | ▼  |  |
| 6   | <input type="checkbox"/> <a href="#">Black Leather Seats</a>      | R003             | Black Leather Seats  |                  | ▼  |  |
| 7   | <input type="checkbox"/> <a href="#">White Leather Seats</a>      | R004             | White Leather Seats  |                  | ▼  |  |
| 8   | <input type="checkbox"/> <a href="#">S series</a>                 | S001             | S Series sedan. Equipped with standard tires & base custom features.       |                  | ▼  |  |
| 9   | <input type="checkbox"/> <a href="#">S Series Tire</a>            | S002             | Tires made to fit the S series sedan.                                      |                  | ▼  |  |
| 10  | <input type="checkbox"/> <a href="#">S Series Battery</a>         | S003             | S Series SUV Battery   |                  | ▼  |  |
| 11  | <input type="checkbox"/> <a href="#">Z Series</a>                 | Z001             | Z series convertible. Equipped with standard tires & base custom features. |                  | ▼  |  |
| 12  | <input type="checkbox"/> <a href="#">Z Series Tire</a>            | Z002             | Tires made to fit the Z series convertible                                 |                  | ▼  |  |

# Sales Cloud: Price Books

 Price Books

Recently Viewed

[New](#)

6 items • Updated a few seconds ago

|   | <input type="checkbox"/> Price Book Name                   | Description  | Last Modified Date | Active                              |  |
|---|--|--|--------------------|-------------------------------------|--|
| 1 | <input type="checkbox"/> <a href="#">S Series Standard</a> | S Series Sedan with Standard custom features       | 4/4/2022, 5:22 PM  | <input checked="" type="checkbox"/> |  |
| 2 | <input type="checkbox"/> <a href="#">S Series Max</a>      | S Series sedan with max custom features            | 4/6/2022, 4:50 AM  | <input checked="" type="checkbox"/> |  |
| 3 | <input type="checkbox"/> <a href="#">Z Series MAX</a>      | Z Series convertible with max custom features      | 4/4/2022, 5:21 PM  | <input checked="" type="checkbox"/> |  |
| 4 | <input type="checkbox"/> <a href="#">Z Series Standard</a> | Z Series convertible with standard custom features | 4/4/2022, 5:21 PM  | <input checked="" type="checkbox"/> |  |
| 5 | <input type="checkbox"/> <a href="#">G Series MAX</a>      | G Series SUV with Max custom features.             | 4/4/2022, 5:20 PM  | <input checked="" type="checkbox"/> |  |
| 6 | <input type="checkbox"/> <a href="#">G Series Standard</a> | G Series SUV with Standard custom features         | 4/4/2022, 5:20 PM  | <input checked="" type="checkbox"/> |  |

# Sales Cloud: Lead Assignment Rules

Lead Assignment Rule

Online Sales Rep

Help for this Page

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

Rule Detail

Edit

Rule Name

Online Sales Rep

Active

☐

Created By

Samuel Preston, 4/4/2022, 3:24 PM

Modified By

Samuel Preston, 4/6/2022, 5:19 AM

Edit

Rule Entries

New Reorder

| Action                                     | Order | Criteria               | Assign To   | Email                               |
|--|-------|------------------------|-------------|-------------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | 1     | Lead: Email EQUALS Yes | James Scott | <input checked="" type="checkbox"/> |

Lead Assignment Rule

To individual Sales member

Help for this Page

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

Rule Detail

Edit

Rule Name

To individual Sales member

Active

☒

Created By

Samuel Preston, 4/4/2022, 2:49 PM

Modified By

Samuel Preston, 4/6/2022, 5:21 AM

Edit

Rule Entries

New Reorder

| Action                                     | Order | Criteria                       | Assign To   | Email                               |
|--|-------|--------------------------------|-------------|-------------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | 1     | Lead: Phone CONTAINS Sales Rep | James Scott | <input checked="" type="checkbox"/> |

Lead Assignment Rule

To Sales queue

Help for this Page

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

Rule Detail

Edit

Rule Name

To Sales queue

Active

☐

Created By

Samuel Preston, 4/4/2022, 3:24 PM

Modified By

Samuel Preston, 4/6/2022, 5:24 AM


Edit

Rule Entries

New Reorder

| Action                                     | Order | Criteria  | Assign To | Email                    |
|--|-------|---|-----------|--------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | 1     | (Lead: Email DOES NOT CONTAIN Yes) AND (Lead: Phone DOES NOT CONTAIN Sales Rep) | Same User | <input type="checkbox"/> |

# Sales Cloud: Web-to-Lead

 **SETUP**  
**Web-to-Lead**

## Web-to-Lead Settings

[Help for this Page ?](#)

SaveCancel

**Web-to-Lead Settings** ! = Required Information


Enable your organization to receive online leads.

**Web-to-Lead Enabled** ☒


To reduce spam, require reCAPTCHA verification for customers' requests. When enabled, requests without verification don't generate leads. After enabling, confirm that your HTML includes the reCAPTCHA information.

**Require reCAPTCHA Verification** ☐

The user who will be listed as Creator when a Lead is created online.

**Default Lead Creator** ! Samuel Preston 

Use Lead Auto-Response Rules to select different email response templates based on attributes of the leads submitted online. Leads not matching any of the rules will be sent the default response template selected below.

**Default Response Template**  

# Service Cloud: Case Assignment

Case Assignment Rule

Billing Case

Help for this Page

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

Billing Case

Active

☐

Created By

Samuel Preston, 4/4/2022, 5:45 PM

Modified By

Samuel Preston, 4/6/2022, 5:02 AM

Edit

Rule Entries

New Reorder

| Action                                     | Order | Criteria                       | Assign To              |
|--|-------|--------------------------------|------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | 1     | Case: Subject CONTAINS Billing | Customer Support Queue |

Case Assignment Rule

Product Case

Help for this Page

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

Product Case

Active

☐

Created By

Samuel Preston, 4/4/2022, 8:49 PM

Modified By

Samuel Preston, 4/6/2022, 5:05 AM

Edit

Rule Entries

New Reorder

| Action                                     | Order | Criteria                       | Assign To              | Email |
|--|-------|--------------------------------|------------------------|-------|
| <a href="#">Edit</a>   <a href="#">Del</a> | 1     | Case: Subject CONTAINS Product | Customer Support Queue | ✓     |

Case Assignment Rule

Supplier Case

Help for this Page

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

Supplier Case

Active

☐

Created By

Samuel Preston, 4/4/2022, 8:53 PM

Modified By

Samuel Preston, 4/6/2022, 5:07 AM

Edit

Rule Entries

New Reorder

| Action                                     | Order | Criteria                        | Assign To              | Email |
|--|-------|---------------------------------|------------------------|-------|
| <a href="#">Edit</a>   <a href="#">Del</a> | 1     | Case: Subject CONTAINS Supplier | Customer Support Queue | ✓     |

# Service Cloud: Escalation Rules

Rule Entry Edit

Supplier Case Rule

Help for this Page ?

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

Enter the rule entry

EditCancel

|                              |  |  |  |  |  |
|------------------------------|--|--|--|--|--|
| Rule Name                    | Supplier Case Rule                       |  |  |  |  |
| Order                        | 1  |  |  |  |  |
| Rule Criteria                | Case: Subject CONTAINS Supplier          |  |  |  |  |
| Business Hours Settings      | Use business hours specified on the case |  |  |  |  |
| How escalation times are set | When case is created                     |  |  |  |  |

EditCancel

Escalation Actions

New

Escalation Actions Help ?

| Action                                     | Escalate At           | Assign To              | Email | Notify | Template |
|--|-----------------------|------------------------|-------|--------|----------|
| <a href="#">Edit</a>   <a href="#">Del</a> | 4 Hours and 0 Minutes | Customer Support Queue | ✓     |        |          |

Rule Entry Edit

Product Case Rule

Help for this Page ?

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

Enter the rule entry

EditCancel

|                              |  |  |  |  |  |
|------------------------------|--|--|--|--|--|
| Rule Name                    | Product Case Rule                        |  |  |  |  |
| Order                        | 1  |  |  |  |  |
| Rule Criteria                | Case: Subject CONTAINS Product           |  |  |  |  |
| Business Hours Settings      | Use business hours specified on the case |  |  |  |  |
| How escalation times are set | When case is created                     |  |  |  |  |

EditCancel

Escalation Actions

New

Escalation Actions Help ?

| Action                                     | Escalate At           | Assign To              | Email | Notify | Template |
|--|-----------------------|------------------------|-------|--------|----------|
| <a href="#">Edit</a>   <a href="#">Del</a> | 4 Hours and 0 Minutes | Customer Support Queue | ✓     |        |          |

Rule Entry Edit

Billing Case Rule

Help for this Page ?

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

Enter the rule entry

EditCancel

|                              |   |  |  |  |  |
|------------------------------|---|--|--|--|--|
| Rule Name                    | Billing Case Rule                                       |  |  |  |  |
| Order                        | 1   |  |  |  |  |
| Rule Criteria                | Case: Subject CONTAINS Billing                          |  |  |  |  |
| Business Hours Settings      | Set business hours on case with <a href="#">Default</a> |  |  |  |  |
| How escalation times are set | When case is created                                    |  |  |  |  |

EditCancel


Escalation Actions

New

Escalation Actions Help ?

| Action                                     | Escalate At           | Assign To              | Email | Notify | Template |
|--|-----------------------|------------------------|-------|--------|----------|
| <a href="#">Edit</a>   <a href="#">Del</a> | 4 Hours and 0 Minutes | Customer Support Queue | ✓     |        |          |

# Service Cloud: Web-to-Case & Case Paths

 **Web-to-Case**

### Web-to-Case Settings

[Help for this Page](#)

Use a simple web form or a self-service customer community to make it easy for customers to submit cases directly to your customer support group. For detailed information on setting up Web-to-Case or Self-Service Community templates, see the Salesforce help.

**Basic Settings**

Enable Web-to-Case ☒

Require reCAPTCHA Verification ☐

Default Case Origin Web

**Auto-Response Email Settings**

Default Response Template Support: Case Created (We

Hide Record Information ☐

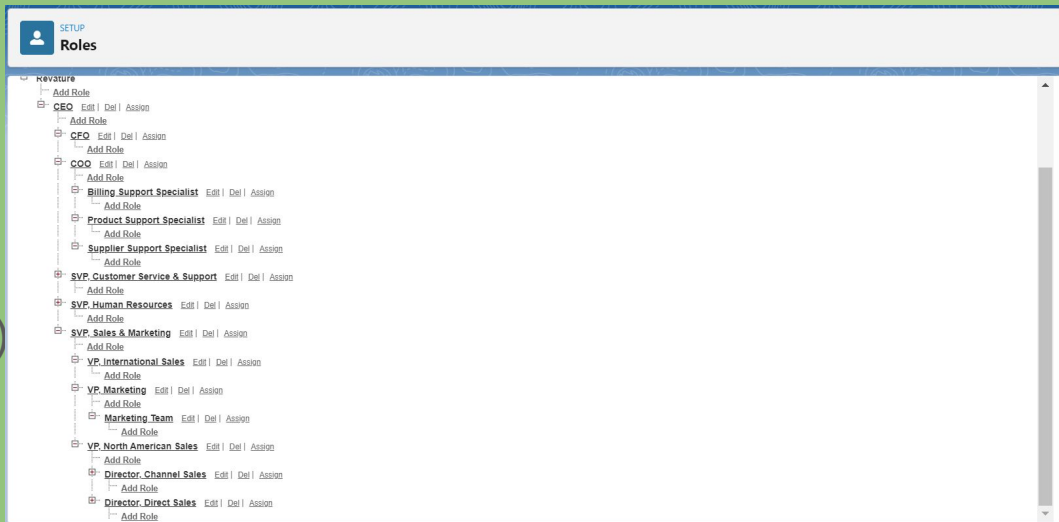
Email Signature

New Path

| Path Name          | Active                              | Object      | Record Type | Action   |
|--------------------|-------------------------------------|-------------|-------------|--|
| Customer Case Path | <input checked="" type="checkbox"/> | Case        | --Master--  | <a href="#">Delete</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a> |
| Live Purchase Path | <input checked="" type="checkbox"/> | Opportunity | --Master--  | <a href="#">Delete</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a> |

# Security

1. Org Wide Defaults:
2. Role Based: (Record level)
3. Sharing Rules: (Field Level)
4. Manual:



| Location Sharing Rules                          |   |  | Location Sharing Rules Help ? |  |
|---|---|--|-------------------------------|--|
| <a href="#">New</a> <a href="#">Recalculate</a> |   |  |                               |  |
| Action  | Criteria  | Shared With                                | Access Level                  |  |
| <a href="#">Edit</a>   <a href="#">Del</a>      | (Location: Location Type EQUALS Building,Warehouse,Site,Plant) AND (Location: Latitude EQUALS 75) AND (Location: Longitude EQUALS 75) | Role and Subordinates: <a href="#">CEO</a> | Read Only                     |  |

| Case Sharing Rules                              |  |   | Case Sharing Rules Help ? |  |
|---|--|---|---------------------------|--|
| <a href="#">New</a> <a href="#">Recalculate</a> |  |   |                           |  |
| Action  | Criteria   | Shared With                                       | Case                      |  |
| <a href="#">Edit</a>   <a href="#">Del</a>      | Owner in <a href="#">Role: Billing Support Specialist</a>  | <a href="#">Role and Subordinates: COO</a>        | Read/Write                |  |
| <a href="#">Edit</a>   <a href="#">Del</a>      | Owner in <a href="#">Role: Product Support Specialist</a>  | <a href="#">Role and Subordinates: COO</a>        | Read/Write                |  |
| <a href="#">Edit</a>   <a href="#">Del</a>      | Owner in <a href="#">Role: Supplier Support Specialist</a> | <a href="#">Role: Supplier Support Specialist</a> | Read/Write                |  |



QUESTIONS ?