

Project 1

Vanquish-Victorious

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Theodore Moore, Dalton Faber

Problem Presented

- Create an organization of our choosing
- Interactive with Automation
- Includes custom objects and a data model

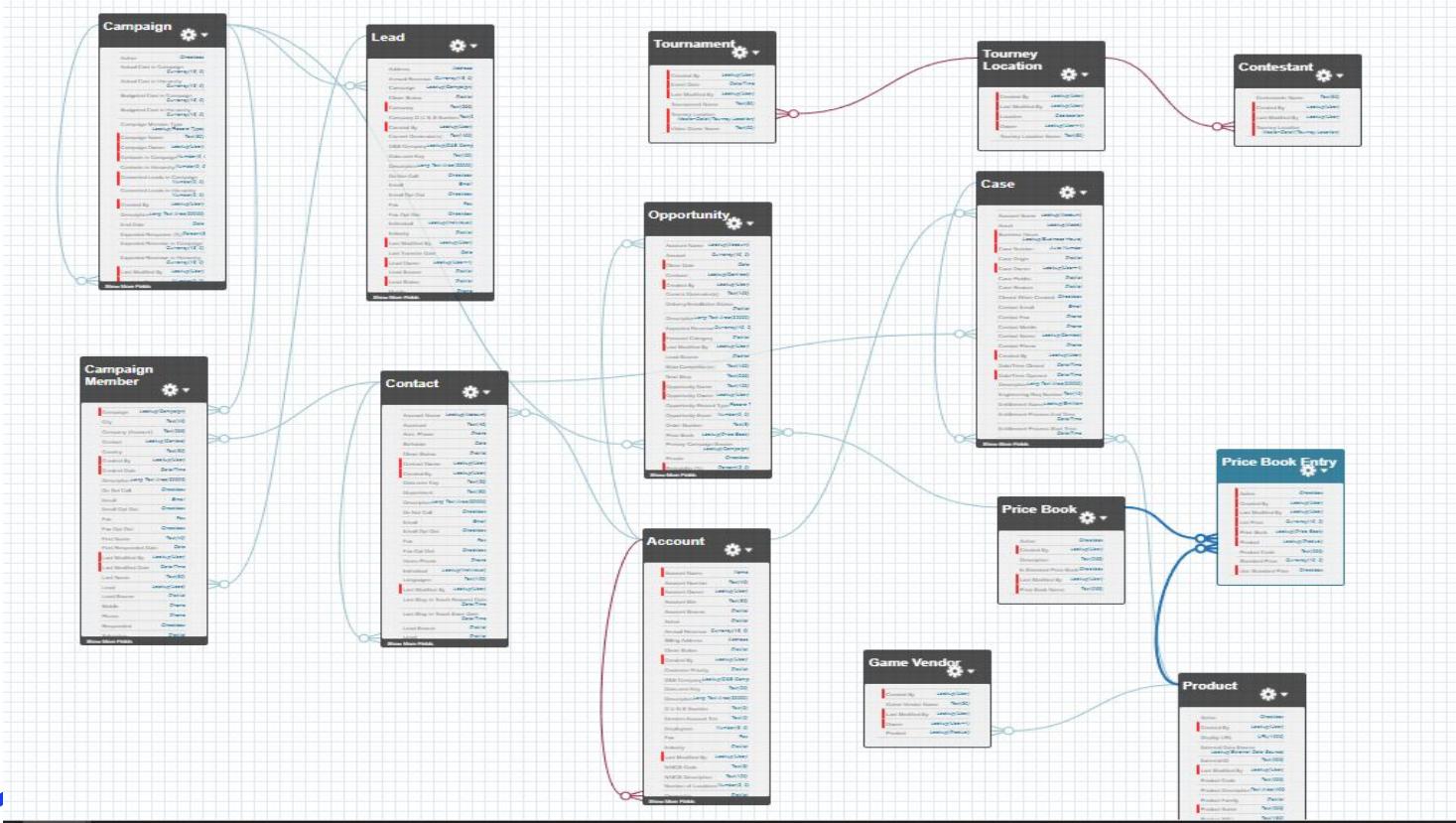
Our Methods

- Work Individually, but as a group
- Scrumban
- Salesforce Trailhead Playgrounds

Organization

The Video Game Company

Schema Builder of The Video Game Company



Leads

Marketing Home Chatter Campaigns Leads Contacts Opportunities Reports Dashboards Game Vendors Contests

All Search Leads and more... Leads Recently Viewed New Import Add to Campaign Change Status Change Owner

4 items • Updated a few seconds ago

	Name	Title	Company	Phone	Mobile	Email	Lead Status	Owner Alias
1	Leroy Jenkins		Snowfall				Open - Not Contacted	AVerg
2	Antonio Monteiro	Collector	Self-Employed				Working - Contacted	AVerg
3	Aparna Bosu	Marketing	Get Cloudy West			aparna@gogetcloudywest.com	Working - Contacted	AVerg
4	Bill Gates	CEO	Microsoft				Open - Not Contacted	AVerg

Search this list...

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

Opportunities

Marketing Home Chatter Campaigns Leads Contacts Opportunities Reports Dashboards Game Vendors Contests

All Search Opportunities and more...

Opportunity Bulk Sale

Lead Source changed successfully.

Account Name Close Date Amount Opportunity Owner

4/20/2022 \$5,000.00 Alberto Vergara

+ Follow Edit New Case New Note

Partner Referral Purchased List Other

Mark Lead Source as Complete

Key Fields

Edit Guidance for Success

Please provide information for the allocated fields.

Account Name

Created By

Alberto Vergara, 4/5/2022, 4:39 PM

Description

Opportunity Name

Bulk Sale

Opportunity Owner

Alberto Vergara

Cases

Rule Entry Edit Video Game Case Escalation

Enter the rule entry Save Cancel

Step 1: Set the order in which this rule entry will be processed

Sort Order 1 2

Step 2: Select the criteria for this rule entry

Run this rule if the criteria are met:

Field	Operator	Value	AND
Case: Business Hours	equals	Default	
Case: Escalated	equals	True	
Case: Status	equals	New	
--None--	--None--		
--None--	--None--		

Add Filter Logic...

Step 3: Specify the business hours criteria for this escalation rule

Ignore business hours
 Use business hours specified on the case
 Set business hours

Step 4: Specify how escalation times are set

When case is created
 When the case is created, and disable after case is first modified
 Based on last modification time

Rule Entry Edit
video game cases

Enter the rule entry Save Cancel

Step 1: Set the order in which this rule entry will be processed

Sort Order 1

Step 2: Select the criteria for this rule entry

Run this rule if the criteria are met:

Field	Operator	Value	AND
Case: Business Hours	equals	Default	
Case: Escalated	equals	True	
Case: Status	equals	New	
--None--	--None--		
--None--	--None--		

Add Filter Logic...

Step 3: Select the user or queue to assign the case to

User Ian Lin

Do Not Reassign Owner

Cases

Email-to-Case Routing Information

< Email-to-Case Setup

Email Address Detail

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

Routing Information

Source Email2Case

 Salesforce.com automatically created the following email service address for you: usestestform1@n-topgezb1hd6pk8sk1nfvxyx0l8r0fy2vak06gsj5z2aa68c-7tsk2eacna213.case.salesforce.com. Configure your email system to forward messages received at usestestform1@gmail.com to this email services address.

Routing Name The Video Game Company
Email Address usestestform1@gmail.com [Verify]
Email Services Address usestestform1@n-topgezb1hd6pk8sk1nfvxyx0l8r0fy2vak06gsj5z2aa68c-7tsk2eacna213.case.salesforce.com
Created By Alberto Vergara 4/5/2022, 5:52 PM

Modified By Alberto Vergara 4/5/2022, 5:52 PM

Email Settings

Save Email Headers
Accept Email From

Task Settings

Create Task from Email
Task Status Not Started

Case Settings

Case Owner Ian Lin
Case Priority Medium
Case Origin Email
Case Record Type Product Support

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

Web-to-Case Settings

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

Basic Settings

Enable Web-to-Case [i](#)

Require reCAPTCHA Verification [i](#)

Default Case Origin [Web](#) [i](#)

Auto-Response Email Settings

Default Response Template [Support: Case Created \(Web\)](#) [i](#)

Hide Record Information [i](#)

Email Signature 

[Save](#) [Cancel](#)

[Help for this Page](#) 

Security

- Org Level Security
- Object Level Security
- Record Level Security
- Field Level Security

Case Field-Level Security for profile
Email Support Profile

Field Name	Field Type	Read Access	Edit Access
Account Name	Lookup	✓	✓
Asset	Lookup	✓	✓
Business Hours	Lookup	✓	✓
Case Number	Auto Number	✓	□
Case Origin	Picklist	✓	✓
Case Owner	Lookup	✓	✓
Case Picklist	Picklist	✓	✓
Case Reason	Picklist	✓	✓
Case Record Type	Record Type	✓	✓
Case Source	Lookup	✓	✓
Closed When Created	Checkbox	✓	□
Contact Email	Email	✓	□
Contact Fax	Phone	✓	□
Contact Mobile	Phone	✓	□
Contact Name	Lookup	✓	✓
Contact Phone	Phone	✓	□
Created By	Lookup	✓	□
Date/Time Closed	Date/Time	✓	□
Date/Time Opened	Date/Time	✓	□
Description	Long Text Area	✓	✓
Engineering Req Number	Text	✓	✓
Entitlement Name	Lookup	✓	□
Entitlement Process End Time	Date/Time	✓	□
Entitlement Process Start Time	Date/Time	✓	□
Escalated	Checkbox	✓	□

Sharing Settings

Default Sharing Settings

Organization-Wide Defaults

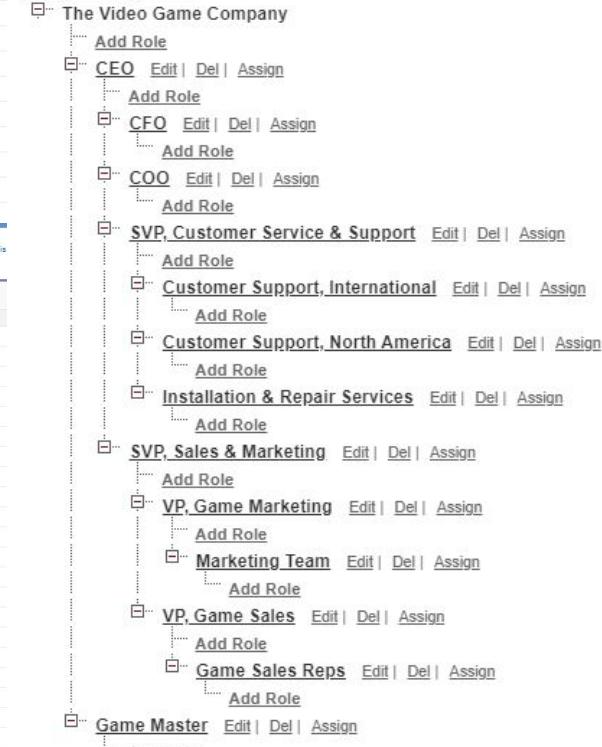
[Edit](#)

Object	Default Internal Access
Lead	Public Read Only
Account and Contract	Public Read/Write
Contact	Controlled by Parent
Order	Controlled by Parent
Asset	Controlled by Parent
Opportunity	Public Read/Write
Case	Public Read/Write/Transfer
Campaign	Public Full Access
Campaign Member	Controlled by Campaign
User	Public Read Only

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

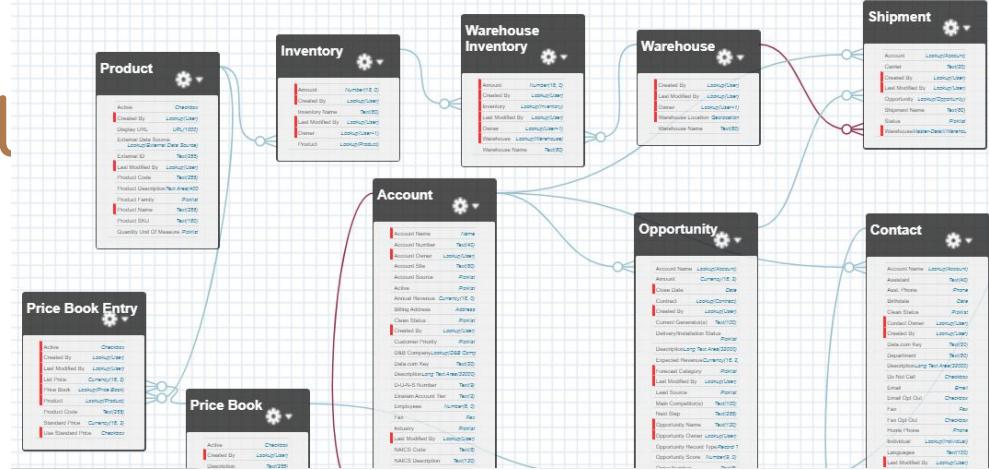


Thank You

Ted's Soda Company

Data Model

- Includes Custom Objects
 - Shipment
 - Inventory
 - Warehouse
- Includes Master-Detail Relationship
- Includes Junction Object



Products

- 2 Products Primarily
 - Sgt. Salt
 - Hilly Frost
- 2 Price Books
 - One for discounts
 - Another for standard



Service Cloud

- Case Assignment Rules
- Escalation Rules

Action	Order	Criteria
Edit Del	1	Case: Description CONTAINS Broken
Edit Del	2	Case: Priority EQUALS High
Edit Del	3	Case: Closed NOTEQUAL TO False

Sales Cloud

- Lead Assignment Rules
- Different Record Types
- Custom Opportunity Path

Rule Entries			New	Reorder
Action	Order	Criteria	Assign To	Email
Edit Del	1	(Lead: Description CONTAINS New) AND (Lead: Description CONTAINS Flavor)	Product Creation Queue	<input type="checkbox"/>
Edit Del	2	Lead: Country NOT EQUAL TO United States	Global Sales Queue	<input type="checkbox"/>
Edit Del	3	Lead: Industry CONTAINS Soda	Soda Sales Queue	<input type="checkbox"/>

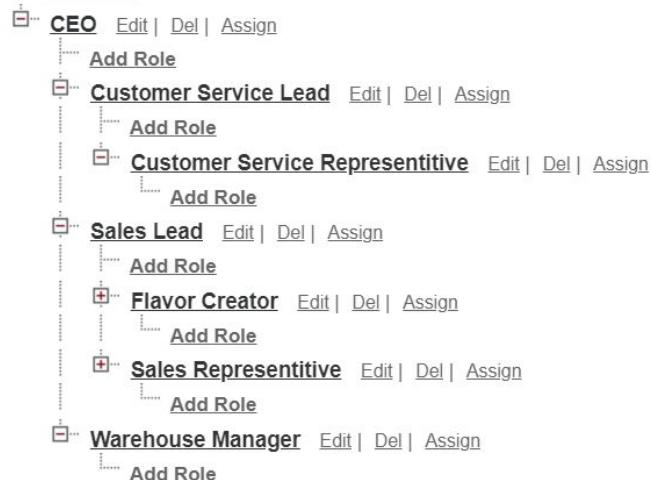
Security

- 3 Distinct Profiles
 - Service Rep
 - Sales Rep
 - Account Manager
- 2 Permission Sets
 - Flavor Creator
 - Warehouse Manager

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Account Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Sales Rep	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Service Rep	Salesforce	<input checked="" type="checkbox"/>

Security- Record Level

- Set Up Org Wide Defaults
- Have a role hierarchy with 3 branches off of CEO
- Sharing Rules
 - Opportunity
 - Case
 - Inventory



Flows

- Screen Flow
 - Used to create warehouse Inventory
 - Autolaunch Flow runs after updating Inventory

Future Iterations

- Automated updates through shipments and Inventory
- Create more Products
- Add different home pages for different profiles

Live Demo

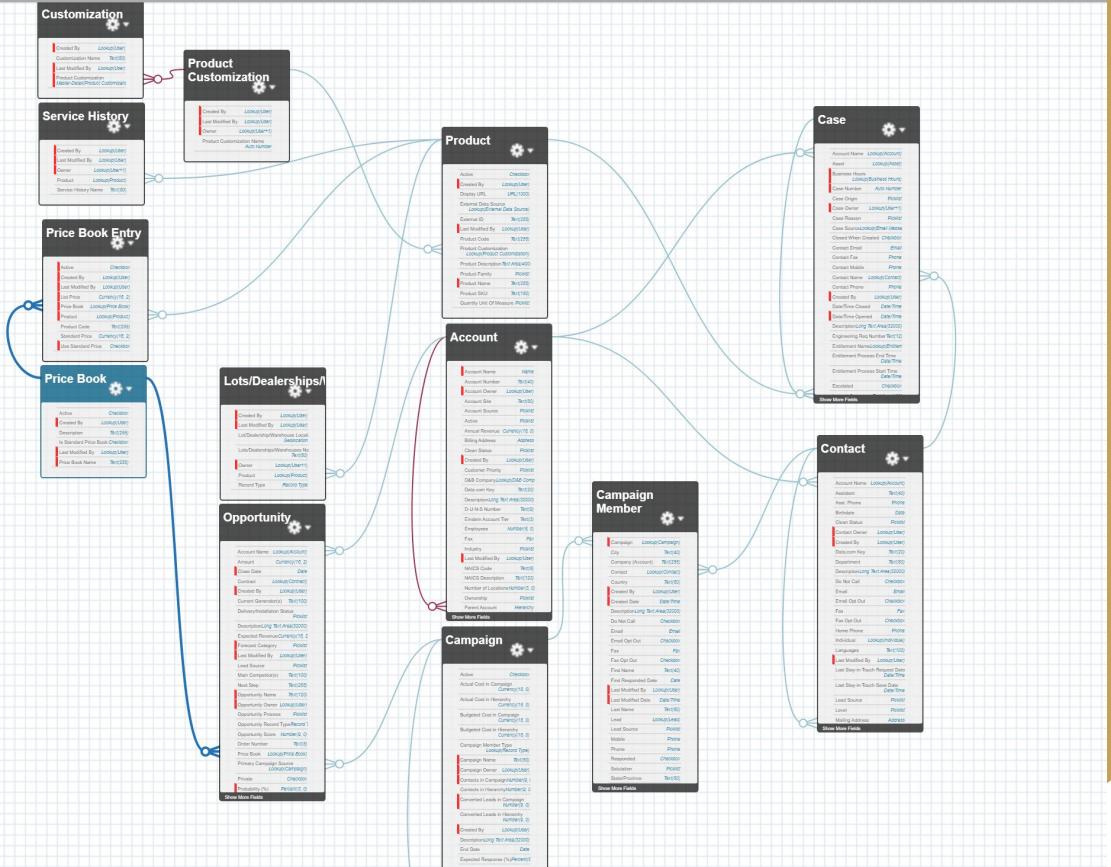
Questions

JACOB

Data Model



- I made a Ford dealership
 - Product Customization is junction
 - Custom Objects:
 - Customization
 - Service History
 - Lots/Dealerships/Warehouses



Price Book/Products

- Standard and CarPrice
- CarPrice has all of my custom products
- Standard Price book has all standard products
- Live demo

Price Books

Recently Viewed

2 items • Updated 4 minutes ago

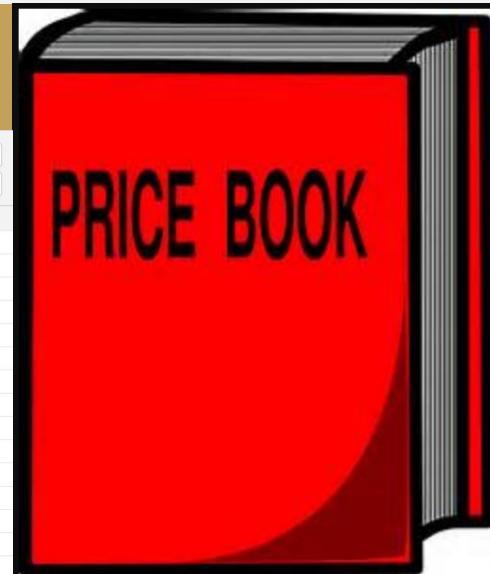
	<input type="checkbox"/> Price Book Name	▼ Description
1	<input type="checkbox"/> CarPrice	
2	<input type="checkbox"/> Standard Price Book	

Products

Recently Viewed

15 items • Updated a few seconds ago

	<input type="checkbox"/> Product Name ↑	<input type="checkbox"/> Product Code	<input type="checkbox"/> Product Description	<input type="checkbox"/> Product Family
1	<input type="checkbox"/> Fiesta	Fiesta1976	Subcompact hatchback	Cars
2	<input type="checkbox"/> Focus	FFocus1998		Cars
3	<input type="checkbox"/> Mustang	FMustang1964		Cars
4	<input type="checkbox"/> Taurus	FTaurus1986		Cars
5	<input type="checkbox"/> GT	FGT2004		Cars
6	<input type="checkbox"/> Bronco	FBronco1965		Trucks
7	<input type="checkbox"/> Edge	FEdge2006		SUVs
8	<input type="checkbox"/> Escape	FEscape2000		SUVs
9	<input type="checkbox"/> EcoSport	FEcoSport2003		Cars
10	<input type="checkbox"/> Expedition	FExpedition1996		Trucks
11	<input type="checkbox"/> Explorer	FExplorer1990		Trucks
12	<input type="checkbox"/> F-150	FF1501948		Trucks
13	<input type="checkbox"/> F-250	FF-2501948		Trucks
14	<input type="checkbox"/> Transit	FTransit1965		Cargo Vans
15	<input type="checkbox"/> Ranger	FRanger1981		Trucks



Assignment/Escalation Rules

Case Assignment Rule Service

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

Rule Name	Service	Edit	Active	<input checked="" type="checkbox"/>
Created By	Jacob Blockey, 4/2/2022, 9:20 AM		Modified By	Jacob Blockey, 4/5/2022, 10:26 AM

[Edit](#)

Rule Entries

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

Action	Order	Criteria	Assign To	Email
Edit Del	1	Case: Subject EQUALS Service	Service	<input type="checkbox"/>

Lead Assignment Rule SalesLead

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

Rule Name	SalesLead	Edit	Active	<input checked="" type="checkbox"/>
Created By	Jacob Blockey, 3/30/2022, 12:42 PM		Modified By	Jacob Blockey, 4/5/2022, 10:25 AM

[Edit](#)

Rule Entries

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

Action	Order	Criteria	Assign To	Email
Edit Del	1	Lead: Lead Source EQUALS Web,Phone Inquiry	Sales	<input checked="" type="checkbox"/>

1. Show Escalation Rules in Demo
2. Show 2 other assignment rules for case/leads
3. Show web-to-case
4. web-to-lead

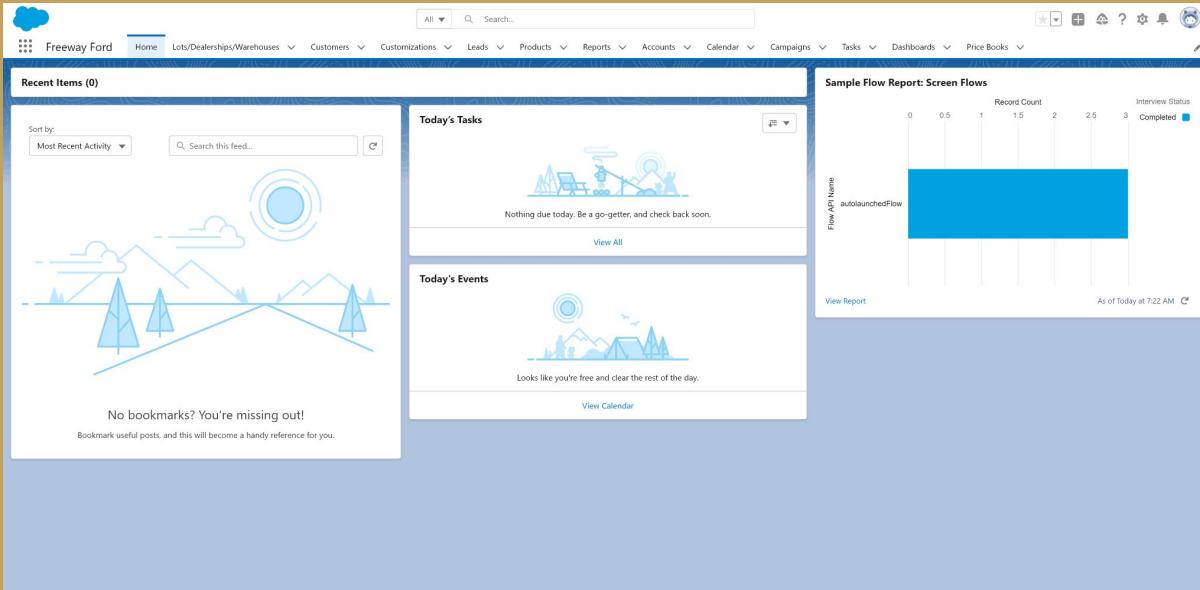
- Opportunity Path
- Case Path



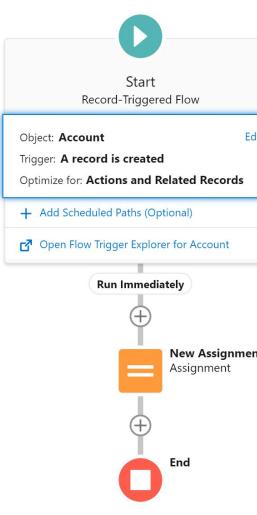
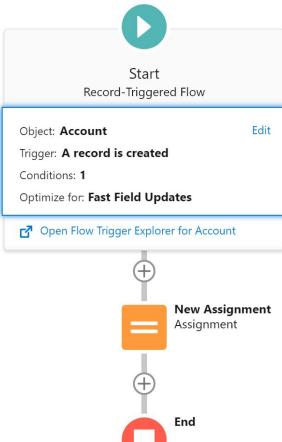
1. Org Level
 - a. Profiles (sales, service)
2. Object Level
 - a. Profiles/User Types (customer Service)
3. Record Level
 - a. OWD (sharing settings)
 - b. Role Hierarchy
 - c. Sharing Rules (scroll down)
 - d. Manual Sharing (Edit, scroll down, checkbox)
 - e. Field Level (permission sets)



Custom App and Homepage

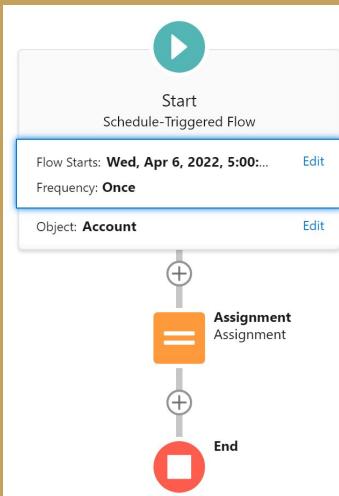


Process Automation



1. Screenflow (demo)
2. Before Save Flow
3. After-save Flow
4. Autolaunched flow

^ Before-save



^ After-Save

< Auto- Launched

Reports and Dashboards

Dashboard **Sales Dashboard**

As of Apr 5, 2022, 9:54 AM Viewing as Jacob Blockey

New accounts and opportunities Report

Account Name ↑	Opportunity Name	Close D...	Won	Clos...
Burlington Textiles Corp of America	Burlington Textiles Weaving Plant Generator	3/8/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dickenson plc	Dickenson Mobile Generators	3/8/2020	<input type="checkbox"/>	<input type="checkbox"/>
Edge Communications	Edge Emergency Generator	3/8/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edge Communications	Edge Installation	3/8/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edge Communications	Edge SLA	3/8/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edge Communications	Edge Emergency Generator	3/8/2020	<input type="checkbox"/>	<input type="checkbox"/>

[View Report \(New accounts and opportunities Report\)](#)

New Price Books with Products Report

Price Book Name ↑	Active (Price Book)	Price Book Description	Active (Price)	List Price
CarPrice	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	\$30.80k
CarPrice	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	\$22.04k
CarPrice	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	\$36.15k
CarPrice	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	\$26.51k
CarPrice	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	\$69.15k
CarPrice	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	\$33.74k
CarPrice	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	\$29.99k

[View Report \(New Price Books with Products Report\)](#)

- Standard Report type (right)
- Custom Report Type (left)

Peripherals!

- Email-to-Case
- Multilevel campaigns

Email-to-Case Settings Edit

To create cases from Outlook, select the options Enable Email-to-Case, as well as Enable On-Demand Service.

After you enable Email-to-Case, you can't disable it. You can, however, disable the On-Demand Service.

Enable Email-to-Case	✓
Notify Case Owners on New Emails	✓
Enable HTML Email	✓
Set Case Source to Email	✓
Save Email-to-Case attachments as Salesforce Files	✓

CAMPAIGN > NEW 2023 CAR SHOW!

Campaign Hierarchy

CAMPAIGN NAME

▼ New 2023 Car show! current

▼ 2023 car show Ad

2023 car show Emails

Future Iterations!

- Flesh out all my objects with more records
- More Pricebooks to organize my products better
- More Products
- Figure out my screen flow and create a record from it
- Get more comfortable with Flows in general
- Get more comfortable and confident with the salesforce platform.





Thank you!
Any Questions?



DALTON

Movie Theater



Sales Cloud

SETUP

Lead Assignment Rules

Lead Assignment Rule Assignment

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	Active	Help for this Page ?
Rule Name	Assignment		<input checked="" type="checkbox"/>	
Created By	Dalton Faber, 4/5/2022, 4:38 AM		Modified By	Dalton Faber, 4/5/2022, 4:50 AM
		Edit		

Rule Entries

Action	Order	Criteria	Assign To	Email
Edit Del	1	Lead: Created Date GREATER THAN 4/1/2022	Nicholas Larson	<input type="checkbox"/>
Edit Del	2	(Campaign: Active EQUALS False) AND (Campaign: End Date EQUALS null)	Nicholas Larson	<input checked="" type="checkbox"/>
Edit Del	3	Campaign: Active EQUALS True	Nicholas Larson	<input checked="" type="checkbox"/>

SETUP

Web-to-Lead

Web-to-Lead Setup

Help for this Page ?

Using pre-existing pages on your company's website, you can capture contact and profile information from users and automatically generate new leads in salesforce.com, enabling you to respond in real-time to customer requests.

The screenshot shows the 'Web-to-Lead' setup interface. At the top, there's a 'My Website' section with fields for First Name, Last Name, and E-mail, followed by a 'Create New Lead' button and a 'SUBMIT' button. A blue arrow points from the 'Create New Lead' button to a preview window showing a lead record in a Salesforce-like interface. Below this is the 'Web-to-Lead Settings' section, which includes a 'Web-to-Lead Enabled' checkbox (checked), a 'Require reCAPTCHA Verification' checkbox (unchecked), a 'Default Lead Creator' field set to 'Dalton Faber', and a 'Default Response Template' field. At the bottom, there's a 'Get Info Before You Start' section with a list of questions:

- [What is the maximum number of leads I can capture?](#)
- [How do I specify which information to capture?](#)
- [Can I capture leads from multiple web pages?](#)
- [What status is assigned to web-generated leads?](#)
- [How can I be sure that leads will not be lost?](#)

na.com/one/one.app#/setup/Lead/Webtolead/home

Product

Pricebook

Price Books
Recently Viewed

4 items • Updated a few seconds ago

New

Search this list...

	Price Book Name	Description	Last Modified Date	Active	
1	<input type="checkbox"/> Concession	Food/drinks	4/5/2022, 12:32 PM	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>
2	<input type="checkbox"/> Standard Price Book		4/4/2022, 12:54 PM	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>
3	<input type="checkbox"/> Tickets	Different types of tickets.	4/4/2022, 12:38 PM	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>
4	<input type="checkbox"/> Tickets-Tuesday	Ticket prices for Tuesday	4/4/2022, 1:04 PM	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>

 Campaigns  

Items • Updated a few seconds ago

Search this list...        

	<input type="checkbox"/> Campaign Name	Parent Campaign ↑	Type	Status	Start Date	End Date	Resp...	Owner ...	
1	<input type="checkbox"/> Flyers	Internal Advertisement	Conference	In Progress	4/1/2022		0	DFabe	
2	<input type="checkbox"/> Pre-Screen Commercial	Advertisement	Advertisement	In Progress	4/10/2022		0	DFabe	
3	<input type="checkbox"/> Internal Advertisement	Advertisement	Advertisement	In Progress	4/1/2022	5/31/2022	0	DFabe	
4	<input type="checkbox"/> Advertisement		Advertisement	In Progress	1/1/2022	12/31/2022	0	DFabe	

Service Cloud

The screenshot shows the 'Escalation Rules' setup page in the Service Cloud interface. The top navigation bar includes 'SETUP' and the 'Escalation Rules' section header. Below the header, the sub-section 'Case Escalation' is selected. A message prompts the user to edit rule entries or add new actions. The main configuration area is titled 'Enter the rule entry' and contains the following details:

Rule Name	Case Escalation	Edit	Cancel	
Order	1			
Rule Criteria	Case: Case Reason EQUALS Performance			
Business Hours Settings	Set business hours on case with Default			
How escalation times are set	When case is created			

Below this, there are 'Edit' and 'Cancel' buttons. The 'Escalation Actions' section at the bottom lists three actions:

Action	Escalate At	Assign To	Email	Notify	Template
Edit Del	5 Hours and 0 Minutes	Nicholas Larson	<input type="checkbox"/>		
Edit Del	6 Hours and 0 Minutes	Nicholas Larson	<input type="checkbox"/>		
Edit Del	7 Hours and 0 Minutes	Nicholas Larson	<input type="checkbox"/>		

At the top right of the 'Escalation Actions' table, there is a link to 'Escalation Actions Help'.

Case Assignment Rule

Case Assignment

[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	Case Assignment	Active	<input checked="" type="checkbox"/>
Created By	Dalton Faber, 4/5/2022, 1:06 PM	Modified By	Dalton Faber, 4/5/2022, 1:15 PM

[Edit](#)

Rule Entries

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

Action	Order	Criteria	Assign To	Email
Edit Del	1	Case: Case Origin EQUALS Email	Nicholas Larson	<input type="checkbox"/>
Edit Del	2	Case: Date/Time Opened EQUALS TODAY	Nicholas Larson	<input type="checkbox"/>
Edit Del	3	(Case: Created By CONTAINS Wesley Lenz) AND (Case: Created By CONTAINS Caitlyn Baxter)	Nicholas Larson	<input type="checkbox"/>

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 

Auto-Response Email Settings

Default Response Template  

Hide Record Information 

Email Signature 



SETUP

Email-to-Case

For Email-to-Case:

- Download the Email-to-Case agent from the [Apex Developer Network](#).
- Install the agent behind your network firewall.
- Configure email routing addresses.
- Enable Email-to-Case.

Email-to-Case Settings

[Edit](#)

- 1 To create cases from Outlook, select the options Enable Email-to-Case, as well as Enable On-Demand Service.

After you enable Email-to-Case, you can't disable it. You can, however, disable the On-Demand Service.

Enable Email-to-Case

Notify Case Owners on New Emails

Enable HTML Email

Set Case Source to Email

Save Email-to-Case attachments as Salesforce Files

Send Emails from Cases

Place User Signatures before Email Threads

On-Demand Service

On-Demand Email-to-Case enables your organization to automatically create cases from email without having you download and install the Email-to-Case agent behind your network's firewall. Simply configure your email system to forward case submission emails to the Email Services Address provided to you by salesforce.com.

Enable On-Demand Service [i](#)

Failure Response Settings:

Over Email Rate Limit Action	Bounce message
Unauthorized Sender Action	Discard message

Campaigns  

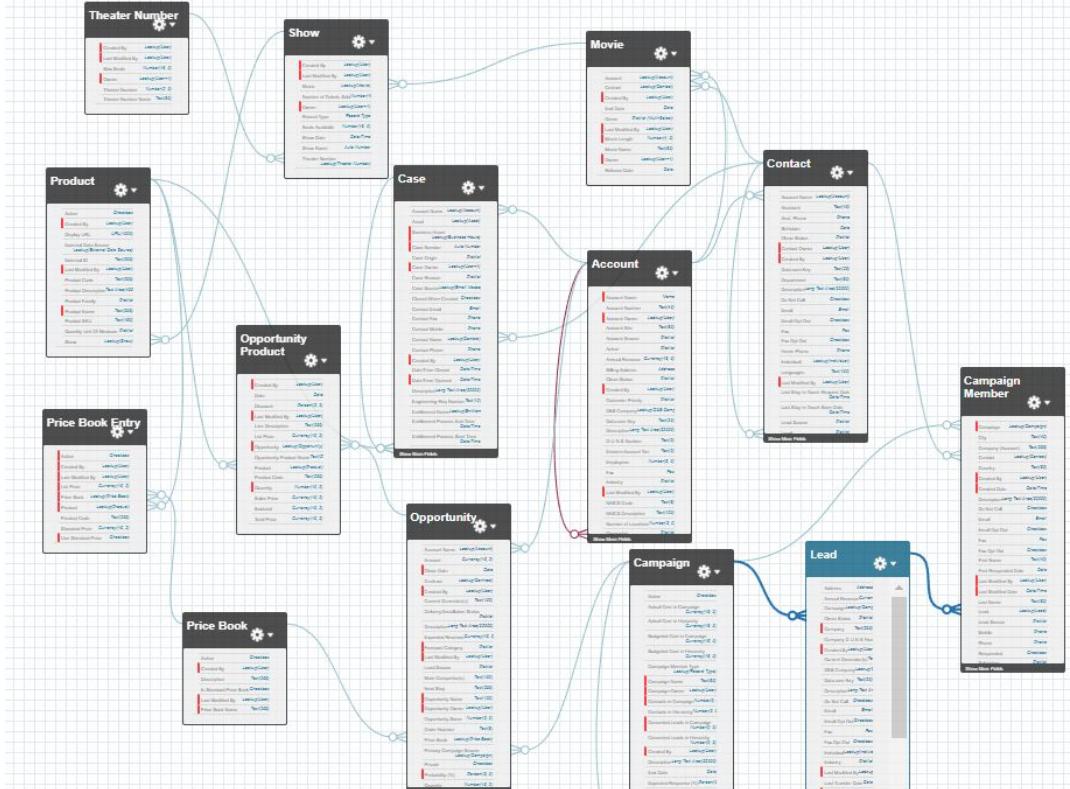
Recently Viewed  

4 items • Updated a few seconds ago

Search this list...       

	<input type="checkbox"/> Campaign Name	Parent Campaign	Type	Status	Start Date	End Date	Respon...	Owner Alias	
1	<input type="checkbox"/> Flyers	Internal Advertisement	Conference	In Progress	4/1/2022		0	DFabe	
2	<input type="checkbox"/> Pre-Screen Commercial	Advertisement	Advertisement	In Progress	4/10/2022		0	DFabe	
3	<input type="checkbox"/> Internal Advertisement	Advertisement	Advertisement	In Progress	4/1/2022	5/31/2022	0	DFabe	
4	<input type="checkbox"/> Advertisement		Advertisement	In Progress	1/1/2022	12/31/2022	0	DFabe	

Data Model



Security

No sharing rules specified.

Movie Sharing Rules		New	Recalculate	Movie Sharing Rules Help
Action	Criteria	Shared With	Access Level	
Edit Del	Owner in All Internal Users	Role: Shift Manager	Read/Write	?

Show Sharing Rules		New	Recalculate	Show Sharing Rules Help
Action	Criteria	Shared With	Access Level	
Edit Del	Owner in All Internal Users	Role: Box Office Staff	Read Only	?
Edit Del	Owner in All Internal Users	Role: Shift Manager	Read/Write	

Roles

Help for this Page 

Below is a list of the roles for your organization. You can view more information by clicking the role link.

New Role

Show in list view 

Action	Role	Reports To	Report Display Name
Edit Del Assign	Store Manager		
Edit Del Assign	Shift Manager	Store Manager	
Edit Del Assign	Box Office Staff	Shift Manager	
Edit Del Assign	Concession Staff	Shift Manager	
Edit Del Assign	Ushers	Shift Manager	



SETUP

Workflow Rules

Workflow Rule
Before expires

« Back to List: Price Books

Help for this Page

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

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

Rule Name	Before expires	Object	Case
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria			Case: Business Hours EQUALS Default
Created By	Dalton Faber	Modified By	Dalton Faber 4/6/2022, 8:22 AM

Workflow Actions

[Edit](#)

Immediate Workflow Actions

Type	Description
Email Alert	Email of Case before EOD

Time-Dependent Workflow Actions

[See an example](#)

1 Day Before Case: Date/Time Closed

No workflow actions have been added to this time trigger.

SERENA

Home Office

Sales Cloud

All Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Quarterly Performance

CLOSED \$40,000 OPEN (>70%) \$0 GOAL --

5/8/2022 · \$40,000

40k
30k
20k
10k
0

Apr May Jun

Orange line: Closed. Green line: Goal. Blue line: Closed + Open (>70%).

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

[View All](#)

Assistant

Nothing needs your attention right now. Check back later.

Leads & Opportunities

Opportunity
Stay-at-Home Parents

Account Name Close Date Amount Opportunity Owner
4/6/2022 \$1,213,200.00 Serena Daley

+ Follow Edit New Case New Note ▾

> ✓ > ✓ > ✓ > ✓ > Other ✓ Mark Lead Source as Complete

Activity Details Chatter

Log a Call New Task New Event Email

Recap your call... Add

Filters: All time • All activities • All types ⚙ Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Related

Products (3)

Desk

Quantity:	6.00
Sales Price:	\$200,000.00
Date:	

Monitor Stand

Quantity:	6.00
Sales Price:	\$1,000.00
Date:	

Webcam Accessory

Quantity:	6.00
Sales Price:	\$1,200.00
Date:	

View All

Leads & Opportunities Continued

The screenshot shows the Salesforce interface for managing Leads. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The Leads tab is currently selected. Below the navigation is a toolbar with New, Import, Add to Campaign, Change Status, and Change Owner buttons, along with a search bar and various filter and action icons.

Recently Viewed

3 items • Updated a few seconds ago

	Name	Title	Company	Phone	Mobile	Email	Lead Status	Owner Alias
1	Lit Goh		WFH Taxes				Open - Not Contacted	SDale
2	Professor Plum		Clue				Closed - Not Converted	SDale
3	Happy Hogan		Happy Hermit				Working - Contacted	SDale

Paths

When you activate your path, Kanban also shows key fields and guidance for views based on the same object, record type, and picklist.

New Path

Path Name	Active	Object	Record Type	Action
Checking Case	<input checked="" type="checkbox"/>	Case	--Master--	Delete Edit Deactivate
Purchasing	<input checked="" type="checkbox"/>	Opportunity	--Master--	Delete Edit Deactivate

Activate Your Path

When you activate your path, key fields and guidance appear in Kanban for the same object, record type, and picklist. Not ready to make this path available? Save it, and activate it later.



Enable Celebrations

When users reach a specific step in the path, help them celebrate their success with on-screen confetti. Confetti appears in paths and kanban views.





Demo
Time