

INVOICEPRO – AUTOMATED INVOICE & PAYMENT REMINDER CRM

Phase 1 Completion Report

1. REQUIREMENT GATHERING

Key Requirements:

- Automatic creation and tracking of invoices.
- Prevention of duplicate invoice records.
- Automated email reminders for pending and overdue payments.
- Real-time dashboards for finance teams and managers.
- Reporting for payment status, overdue invoices, and financial trends.

Objectives:

- Reduce manual workload and errors in invoice processing.
- Improve on-time collections and cash flow management.
- Enhance transparency and financial decision-making.

2. STAKEHOLDER ANALYSIS

Primary stakeholders and benefits:

Finance Teams

- Efficiently create and track invoices.
- Receive automated reminders to follow up with customers.

Managers & Business Owners

- Monitor outstanding payments and cash flow in real-time.
- Make informed financial decisions based on dashboard insights.

Customers

- Receive timely reminders and clear invoices.
- Reduce miscommunication or missed payments.

3. BUSINESS PROCESS MAPPING

Core Processes Include:

- Generating and sending invoices to customers automatically.
- Detecting and preventing duplicate invoice records.
- Sending automated email reminders for upcoming and overdue payments.

- Tracking payment status and updating records in real-time.
- Generating financial reports and dashboards for performance analysis.

4. INDUSTRY-SPECIFIC USE CASE ANALYSIS

Applicable Sectors: SMEs, retail, service-based businesses, and any organization handling recurring invoices.

Use Cases:

- Automating invoice generation and management.
- Sending proactive reminders to customers for faster payments.
- Providing actionable insights for finance teams to manage cash flow.
- Maintaining accurate records for accounting, reconciliation, and compliance.

5. APP EXCHANGE EXPLORATION

Salesforce CRM enables:

- Centralized invoice and customer data management.
- Automated workflows and email reminders.
- Real-time dashboards and reporting for financial performance.
- Role-based access for finance teams, managers, and customers.

Benefits:

- Scalable and maintainable financial operations.
- Reduced manual errors and duplicate records.
- Improved cash flow and operational efficiency.
- Enhanced decision-making with actionable insights.

Phase 2: Org Setup & Configuration-Completion Report

Project: InvoicePro Automated Invoice Payment Reminder CRM

Institute: Prof. Ram Meghe Institute of Technology & Research

1. Salesforce Edition

- Developer Org used for implementation

2. Company Profile Setup

- Company Name: InvoicePro Corp
- Default Locale: English (India)
- Default Currency: INR
 - Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Process Flow: Setup → Company Information → Edit Company Profile

Company Information
InvoicePro Corp

Help for this Page 

The organization's profile is below.

[User Licenses \[10+\]](#) | [Permission Set Licenses \[10+\]](#) | [Feature Licenses \[11\]](#) | [Usage-based Entitlements \[10+\]](#)

Organization Detail		Edit
Organization Name	InvoicePro Corp	Phone (555) 123-4678
Primary Contact	OrgFarm EPIC	Fax (555) 123-4678
Division		Default Locale English (India)
Address	123 Business Avenue Amravati 12356 Maharashtra India	Default Language English
Fiscal Year Starts In	January	Default Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space 342 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space 17 KB (0%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours 0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours 0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month 0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID 00DgK00000BEq5F
		Organization Edition Developer Edition
		Instance CAN96

3. Business Hours & Holidays

- Business Hours: All days, 09:00 AM – 06:00 PM
- Holidays: Independence Day (15 Aug)

Republic Day (26 Jan)

Off Day (Saturday & Sunday- Weekly)

- Process Flow: Setup → Company Settings → Business Hours → Define & Assign

Business Hours Detail

Business Hours Name	InvoicePro Business Hours	Time Zone														
Business Hours	<table border="1"> <tr><td>Sunday</td><td>24 Hours</td></tr> <tr><td>Monday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Tuesday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Wednesday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Thursday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Friday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Saturday</td><td>24 Hours</td></tr> </table>	Sunday	24 Hours	Monday	9:00 AM to 6:00 PM	Tuesday	9:00 AM to 6:00 PM	Wednesday	9:00 AM to 6:00 PM	Thursday	9:00 AM to 6:00 PM	Friday	9:00 AM to 6:00 PM	Saturday	24 Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)
Sunday	24 Hours															
Monday	9:00 AM to 6:00 PM															
Tuesday	9:00 AM to 6:00 PM															
Wednesday	9:00 AM to 6:00 PM															
Thursday	9:00 AM to 6:00 PM															
Friday	9:00 AM to 6:00 PM															
Saturday	24 Hours															

Holidays

Holiday Name	Description	Date and Time
Independence Day		8/15/2026 All Day
Off Day		9/20/2025 All Day
Republic Day		1/26/2026 All Day

4. Fiscal Year Settings

- **Fiscal Year:** Standard, January (The ending month)
- Process Flow: Setup → Company Settings → Fiscal Year → Standard Fiscal Year

Organization Fiscal Year Edit: InvoicePro Corp

Setup Help for this Page

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Change Fiscal Year Period

<input checked="" type="radio"/> Standard Fiscal Year	<input type="radio"/> Custom Fiscal Year
Name: InvoicePro Corp	Save Cancel
Fiscal Year Start Month: January	
Fiscal Year is Based On:	<input checked="" type="radio"/> The ending month <input type="radio"/> The starting month

5. User Setup & Licenses

- Finance Officer: License = Salesforce, Profile = Finance Officer Profile, Role = Finance Department

- Finance Manager: License = Salesforce, Profile = Finance Manager Profile, Role = Finance Manager
- Sales Representative: License = Salesforce Platform, Profile = Sales User Profile, Role = Sales Department

Process Flow: Setup → Users → New User → Assign License & Profile

User Edit
Rajesh Patil

User Edit Save Save & New Cancel

General Information

First Name	Rajesh
Last Name	Patil
Alias	rpatil
Email	johnfinance@gmail.com
Username	rajeshp.patil@invoicepro.com
Nickname	rpatil
Title	Finance Officer
Company	
Department	Finance
Division	

Role Finance Department
User License Salesforce
Profile Finance Officer Profile
Active

Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type

Data.com Monthly Addition Limit 300
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode

6. Roles

- CEO → Finance Department → Finance Manager
- Sales Department under CEO

Process Flow: Setup → Roles → Define Hierarchy → Assign Users

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
- InvoicePro Corp
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - CFO Edit | Del | Assign
 - Add Role
 - COO Edit | Del | Assign
 - Add Role
 - Finance Department Edit | Del | Assign
 - Add Role
 - Finance Manager Edit | Del | Assign
 - Add Role

7. Profiles

- Finance Officer Profile
- Finance Manager Profile

- Sales User Profile

Process Flow: Setup → Profiles → New Profile

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. At the top, there's a search bar and a 'New Profile' button. Below the header, a table lists five profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Finance Manager Profile	Salesforce	✓
<input type="checkbox"/>	Finance Officer Profile	Salesforce	✓
<input type="checkbox"/>	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>
<input type="checkbox"/>	Force.com - Free User	Force.com - Free	<input type="checkbox"/>

8. Permission Sets

- Finance API Access → Finance Officer
- Reports Editor → Finance Manager
- View Invoices

The screenshot shows the Salesforce 'Permission Sets' page under the 'SETUP' tab. At the top, there's a search bar and a 'New' button. Below the header, a table lists three permission sets:

Action	Permission Set Name	Description	License
<input type="checkbox"/>	Facility_Manager	Lets users create, read, e...	Facility Manager
<input type="checkbox"/>	FieldServiceMobileStanda...	Give your mobile workforc...	Field Service Mobile
<input type="checkbox"/>	Finance API Access	API & Apex access for Fin...	

9. Organization- Wide Defaults (OWD)

- Invoice=private

Process Flow: Setup → Sharing Settings → Define OWD



SETUP

Sharing Settings

Snapshot	Private	Private	Private
Finance Transaction	Private	Private	<input checked="" type="checkbox"/>
Flow	Private	Private	<input checked="" type="checkbox"/>
Flow Interview	Private	Private	<input checked="" type="checkbox"/>
Flow Interview Log	Private	Private	<input checked="" type="checkbox"/>
Flow Test Result	Public Read Only	Private	<input checked="" type="checkbox"/>
Fulfillment Order	Public Read/Write	Private	<input checked="" type="checkbox"/>
Image	Private	Private	<input checked="" type="checkbox"/>
Incident	Private	Private	<input checked="" type="checkbox"/>
Inventory Reservation	Public Read/Write	Private	<input checked="" type="checkbox"/>
Invoice	Private	Private	<input checked="" type="checkbox"/>
Legal Entity	Private	Private	<input checked="" type="checkbox"/>
List Email	Private	Private	<input checked="" type="checkbox"/>
Location	Public Read/Write	Private	<input checked="" type="checkbox"/>
Location Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Location Shipping	Public Read Only	Private	<input checked="" type="checkbox"/>

10. Sharing Rules

- Invoice: Shared with Finance Manager

Process Flow: Setup → Sharing Settings → New Sharing Rule → Define Access



SETUP

Sharing Settings

Setup Help for this Page ⓘ

Invoice Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label	Share Owned Invoices With []
Rule Name	Share_Owned_Invoices_With []
Description	[]
Invoice: owned by members of	Role: Finance Department
Share with	Role: Finance Manager
Access Level	Read/Write []
Created By	Ayush Saysikmal 9/17/2025, 11:19 AM

Modified By Ayush Saysikmal 9/17/2025, 11:19 AM

Save Cancel

Outcomes of Phase 2:

- Developer Org successfully configured
- Company information standardized.
- Roles, profiles, and permission sets created and assigned.

- OWD and Sharing Rules enforced for record-level security.
- Finance Officer and Finance Manager have proper controlled on invoices,etc.
- Phase 2 deliverables completed. Ready to proceed to Phase 3: Data Modeling & Relationships.

Phase 3 — Data Modeling & Relationships

1. Create Custom Objects

- **Setup → Object Manager → Create → Custom Object**
 - Invoice → Invoice__c → Auto Number: INV-{0000}
 - Payment → Payment__c → Auto Number: PAY-{0000}
 - Reminder → Reminder__c → Auto Number: REM-{0000}

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The page displays a list of objects with columns for Label, API Name, Type, Description, Last Modified, and Deployed status. The objects listed are:

Label	API Name	Type	Description	Last Modified	Deployed
Credit Memo Invoice Application	CreditMemoInvApplication	Standard Object			
Invoice	Invoice__c	Custom Object	Stores invoice header data for InvoicePro	9/18/2025	✓
Invoice	Invoice	Standard Object			
Invoice Line	InvoiceLine	Standard Object			
Payment Line Invoice	PaymentLineInvoice	Standard Object			

2. Add Fields to Objects

- **Setup → Object Manager → Invoice → Fields & Relationships → New**
 - Invoice__c Fields
 - Payment__c Fields
 - Reminder__c Fields

The screenshot shows the 'Fields & Relationships' section for the 'Invoice' object. It lists various fields with their field labels, names, data types, controlling fields, and indexing status. The fields include:

Field Label	Field Name	Data Type	Controlling Field	Indexed
Amount	Amount__c	Currency(16, 2)		
Created By	CreatedBy	Lookup(User)		
Customer	Customer__c	Lookup(Account)		
Due Date	Due_Date__c	Date		
Invoice Date	Invoice_Date__c	Date		
Invoice Number	Name	Auto Number		
Invoice PDF URL	Invoice_PDF_URL__c	URL(255)		
Last Modified By	LastModifiedBy	Lookup(User)		
Notes	Notes__c	Long Text Area(32000)		
Owner	OwnerId	Lookup(User,Group)		
Payment Terms	Payment_Terms__c	Number(3, 0)		

3. Relationships

- **Payment → Master-Detail → Invoice** → Payments inherit owner/sharing
- **Reminder → Lookup → Invoice** → Reminders related list
- **Invoice → Lookup → Account** → Customer linked

The screenshot shows the 'Object Manager' setup for the 'Invoice' object. On the left, the 'Fields & Relationships' tab is selected. In the center, a custom field named 'Customer' is being edited. The 'Field Information' section shows details like Field Label ('Customer'), Field Name ('Customer'), API Name ('Customer__c'), Description ('Account linked to this invoice (customer)'), Data Owner ('Customer'), and Data Type ('Lookup'). The 'Object Name' is set to 'Invoice'. The 'Lookup Options' section shows 'Related To' as 'Account' and 'Child Relationship Name' as 'Invoices'. A note states 'What to do if the lookup record is deleted? Don't allow deletion of the lookup record that's part of a lookup relationship.' The 'Validation Rules' section at the bottom has a 'New' button.

4. Record Types (Invoice)

- **Setup → Object Manager → Invoice → Record Types → New**
 - Draft → Default for Finance Profile
 - Sent → Finance, Manager profiles
 - Paid → Finance, Manager profiles
 - Overdue → Finance, Manager profiles

The screenshot shows the 'Record Types' list for the 'Invoice' object. The 'Record Types' tab is selected on the left. The main area displays five record types: 'Draft', 'Overdue', 'Paid', and 'Sent'. Each record type has a description and an 'ACTIVE' status. The 'MODIFIED BY' column shows the user 'Ayush Saysikmat' and the date/time of modification. The top right of the screen includes a 'Quick Find' bar, a 'New' button, and a 'Page Layout Assignment' link.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Draft	Initial invoices not yet sent	✓	Ayush Saysikmat, 9/18/2025, 3:32 AM
Overdue	Invoice past due date	✓	Ayush Saysikmat, 9/18/2025, 7:19 AM
Paid	Invoice fully paid	✓	Ayush Saysikmat, 9/18/2025, 3:36 AM
Sent	Invoice sent to customer	✓	Ayush Saysikmat, 9/18/2025, 3:35 AM

5. Page Layouts & Compact Layouts

- **Invoice_Finance_Layout:**

- Highlight Panel → Invoice Number, Status__c, Amount__c, Due_Date__c
- Sections → Invoice Details & Notes
- Related Lists → Payments, Reminders, Activity History, Notes
- Compact Layout → Invoice_Compact_Finance
- Assign → Finance Profile, all record types

- **Invoice_Manager_Layout:**

- Highlight Panel → Invoice Number, Status__c, Amount__c, Customer__c
- Sections → Invoice Details, Finance Notes / Escalation
- Related Lists → Payments, Reminders, Activity History
- Compact Layout → Invoice_Compact_Manager
- Assign → Manager Profile, all record types

The screenshot shows the Salesforce Object Manager interface for the 'Invoice' object. The left sidebar has a 'Page Layouts' section selected. The main area displays a table titled 'Page Layouts' with three items. The columns are 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The items are:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Invoice Layout	Ayush Saysikmal, 9/18/2025, 1:34 AM	Ayush Saysikmal, 9/18/2025, 4:20 AM
Invoice_Finance_Layout	Ayush Saysikmal, 9/18/2025, 3:55 AM	Ayush Saysikmal, 9/18/2025, 4:46 AM
Invoice_Manager_Layout	Ayush Saysikmal, 9/18/2025, 4:08 AM	Ayush Saysikmal, 9/18/2025, 4:20 AM

Invoice					
Details	Compact Layouts 3 Items, Sorted by Label				
	Label	API Name	Primary	Modified By	Last Modified
	Invoice_Compact_Finance	Invoice_Compact_Finance		Ayush Saysikmal	9/18/2025, 4:03 AM
	Invoice_Compact_Manager	Invoice_Compact_Manager	✓	Ayush Saysikmal	9/18/2025, 4:11 AM
	System Default	SYSTEM			

6. Field-Level Security

- **Setup → Object Manager → Invoice → Fields & Relationships → [Select Field] → Set Field-Level Security**
 - Finance → All fields visible/editable
 - Manager → Fields visible, some read-only
 - Sales → Status__c, Amount__c visible (Read-only), other fields hidden

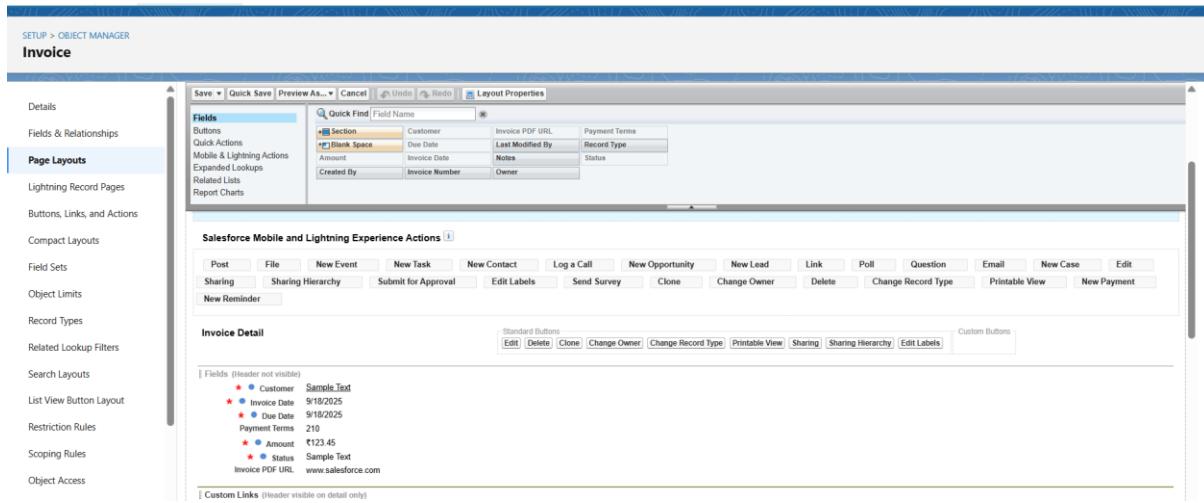
The screenshot shows the Salesforce Setup interface with the following details:

- Header:** SETUP > OBJECT MANAGER
- Left Navigation:** Home, Object Manager
- Search Bar:** Q Quick Find
- Page Title:** SET UP
- Section:** Set Field-Level Security
- Object:** Customer
- Buttons:** Save, Cancel, Help for this Page
- Form Fields:**
 - Field Label: Customer
 - Data Type: Lookup(Account)
- Table:** Field-Level Security for Profile

	Visible	Read-Only
Analytics Cloud Integration User	✓	□
Analytics Cloud Security User	✓	□
Anypoint Integration	✓	□
Contact Manager	✓	□
Cross Org Data Proxy User	✓	□
Custom: Marketing Profile	✓	□
Custom: Sales Profile	✓	□
Custom: Support Profile	✓	□
Einstein Agent User	✓	□
Finance Manager Profile	✓	□
Finance Officer Profile	✓	□
Force.com - App Subscription User	✓	□
Force.com - Free User	✓	□
Gold Partner User	✓	□
Identity User	✓	□

7. Related Lists & Buttons

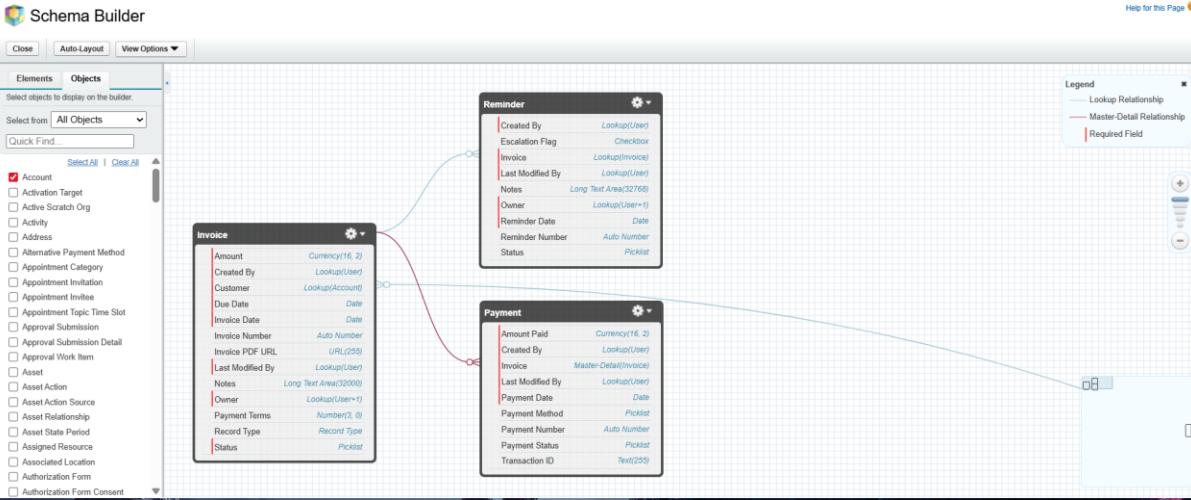
- **Setup → Object Manager → Invoice → Page Layouts → Edit Layout**
 - Payments → Payment Number, Payment Date, Amount Paid, Payment Method, Status
 - Reminders → Reminder Date, Status, Escalation Flag
 - Quick Actions → New Payment / New Reminder (requires tabs)



8. Schema Builder Verification

- **Setup → Schema Builder → Add Invoice, Payment, Reminder, Account**

- Confirm relationships: Payment → Master-Detail → Invoice; Reminder → Lookup → Invoice; Invoice → Lookup → Account
- Rearrange & save/export visual



Phase 4 — Process Automation

1. Validation Rules

Setup → Object Manager → Invoice → Validation Rules → New

- Invoice_Draft_Require_Customer
- Invoice_DueDate_After_InvoiceDate
- Invoice_Amount_NonNegative

The screenshot shows the Salesforce Object Manager interface for the 'Invoice' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Validation Rules' and shows three items sorted by Rule Name. Each rule has columns for Rule Name, Error Location, Error Message, Active status, and Modified By.

Rule Name	Error Location	Error Message	Active	Modified By
Invoice_Amount_NonNegative	Amount	Amount cannot be negative.	✓	Ayush Saysikmal, 9/19/2025, 6:07 AM
Invoice_Draft_Require_Customer	Customer	Customer is required for Draft invoices.	✓	Ayush Saysikmal, 9/19/2025, 6:05 AM
Invoice_DueDate_After_InvoiceDate	Due Date	Due Date cannot be earlier than Invoice Date.	✓	Ayush Saysikmal, 9/19/2025, 6:06 AM

2. Duplicate Prevention

Setup → Duplicate Management → Matching Rules → New

- Invoice_Duplicate_Match

The screenshot shows the Matching Rules page under Duplicate Management. The sidebar includes a search bar and navigation links for Data and Duplicate Management. The main area displays a table of matching rules with columns for Action, Rule Name, Object, Status, Description, Last Modified Date, and Last Modified By.

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Del / Deactivate	Invoice_Duplicate_Match	Invoice	Active	Matching rule for account records. More info	9/19/2025	Ayush
Deactivate	Standard Account Matching Rule	Account	Active	Matching rule for contact records. More info	9/10/2025	QEPICT
Deactivate	Standard Contact Matching Rule	Contact	Active	Matching rule for lead records. More info	9/10/2025	QEPICT
Deactivate	Standard Lead Matching Rule	Lead	Active	Matching rule for lead records. More info	9/10/2025	QEPICT

Setup → Duplicate Management → Duplicate Rules → New

- Block_Duplicate_Invoice

The screenshot shows the 'Duplicate Rules' page in the Salesforce Setup interface. The left sidebar includes 'Data' (Duplicate Management, Duplicate Error Logs, Duplicate Rules), 'Matching Rules', and a search bar. The main area displays a table of existing duplicate rules:

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Block_Duplicate_Invoice	Identify accounts that duplicate other accounts.	Invoice	Invoice_Duplicate_Match	✓	avu	9/19/2025
Standard Account Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Account	Standard Account Matching Rule	✓	OEPIC	9/10/2025
Standard Contact Duplicate Rule	Identify leads that duplicate other leads and contacts.	Contact	Standard Contact Matching Rule	✓	OEPIC	9/10/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Lead Matching Rule	✓	OEPIC	9/10/2025

Navigation links at the bottom include A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z, Other, and All.

3. Email Templates & Alerts

Setup → Email Templates → New → Email Template

- Invoice_Overdue_Alert
- Invoice_Reminder_Notification

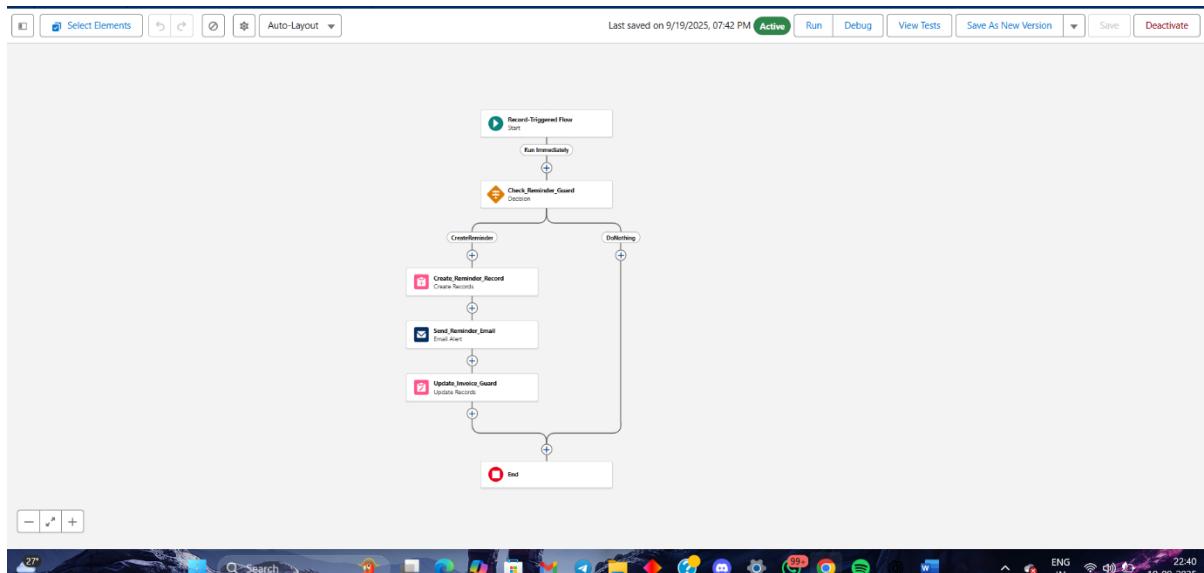
The screenshot shows the 'Classic Email Templates' page in the Salesforce Setup interface. The left sidebar includes 'Email' (Classic Email Templates, Lightning Email Templates), and a search bar. The main area displays a table of existing email templates:

Action	Name	Type	Active	Last Modified By	Last Modified Date
Edit Del	Appointment for Unauthenticated User using Appointment Types - For Amazon Chime.	Custom	✓	avu	9/10/2025
Edit Del	Appointment for Unauthenticated User using Appointment Types - For third party.	Custom	✓	avu	9/10/2025
Edit Del	Appointment for Unauthenticated User using Engagement Channels-For Amazon Chime.	Custom	✓	avu	9/10/2025
Edit Del	Appointment for Unauthenticated User using Engagement Channels-For third party.	Custom	✓	avu	9/10/2025
Edit Del	Canceled Service Appointment Confirmation Email	Custom	✓	avu	9/10/2025
Edit Del	Commerce Reorder Portal_ Invitation	Custom	✓	autoproc	9/10/2025
Edit Del	Group Service Appointments Enrollment Confirmation Email	Custom	✓	avu	9/10/2025
Edit Del	Invoice_Approval_Request	Text	✓	avu	9/19/2025
Edit Del	Invoice_Overdue_Alert	Text	✓	avu	9/19/2025
Edit Del	Invoice_Reminder_Notification	Text	✓	avu	9/19/2025
Edit Del	Marketing_Product Inquiry Response	Text	✓	OEPIC	9/10/2025
Edit Del	Rescheduled Service Appointment Confirmation Email	Custom	✓	avu	9/10/2025
Edit Del	Sales_New Customer Email	Text	✓	avu	9/10/2025
Edit Del	Scheduled Service Appointment Confirmation Email	Custom	✓	avu	9/10/2025
Edit Del	Scheduler Payments_Payment Reminder for Service Appointment Email	Custom	✓	avu	9/10/2025
Edit Del	Scheduler Payments_Service Appointment Cancellation Email	Custom	✓	avu	9/10/2025
Edit Del	Scheduler Payments_Service Appointment Confirmation Email	Custom	✓	avu	9/10/2025

4.Flows

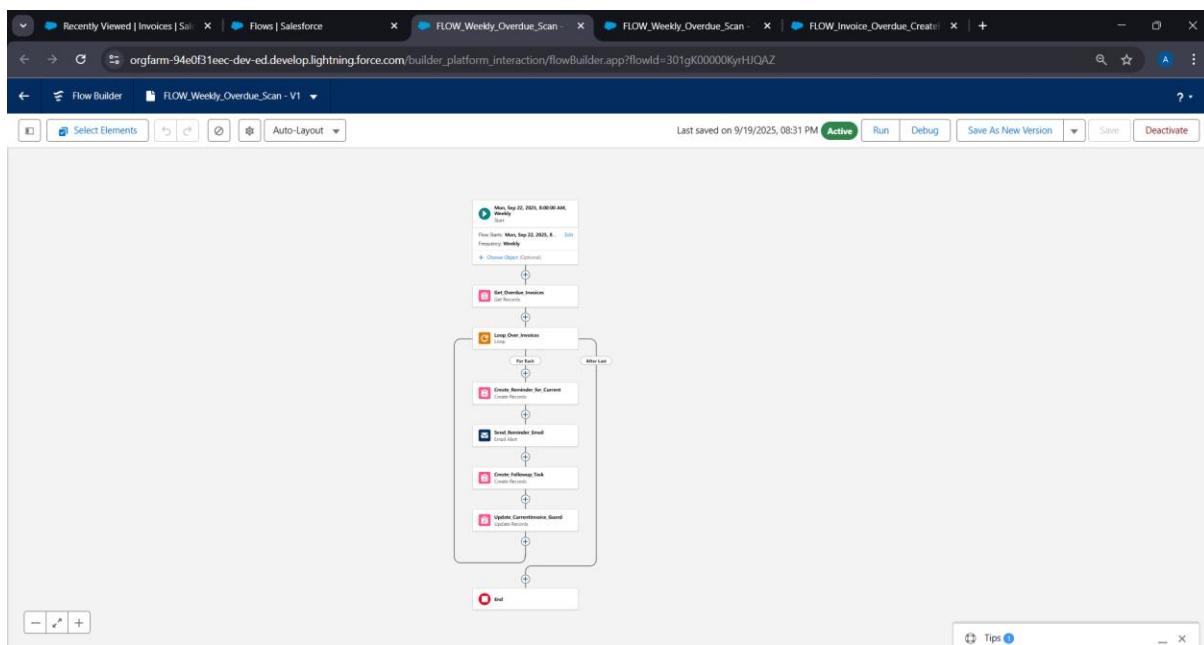
Setup → Flows → Record-Triggered Flow

- Flow invoice overdue create reminder



Setup → Flows → Schedule-Triggered Flow

- Flow weekly overdue scan



5. Approval Process

Setup → Approval Processes → Invoice → Use Standard Wizard

- Invoice cancellation approval

The screenshot shows the 'Approval Processes' page for the 'Invoice' object. The top navigation bar includes tabs for 'Recently Viewed | Invoices | Sales', 'Approval Processes | Salesforce', 'FLOW_Weekly_Overdue_Scan -', 'FLOW_Weekly_Overdue_Scan -', 'FLOW_Invoice_Overdue_Create -', and '+'. The main content area has a search bar labeled 'Search Setup' and a sidebar with a 'Setup' icon and a 'Search' bar containing 'appro'. The main panel title is 'Approval Processes' with a 'SETUP' icon. Below it is a section titled 'Invoice' with a note: 'Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.' A numbered list of steps is provided: 1. Read the help topic, 2. View the checklist, 3. Create a process using hierarchical relationship field, 4. Create email templates, 5. Create an approval process using either the Jump Start or Standard Wizard, 6. Add Approval History Related List to all page layouts, 7. Activate the process to deploy to your users. A 'Manage Approval Processes For' dropdown is set to 'Invoice'. Below this is a note: 'A listing of both active and inactive approval processes for invoices is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.' A 'Create New Approval Process' button is available. The 'Active Approval Processes' section shows 'No approval processes available'. The 'Inactive Approval Processes' section lists one entry: 'Action Approval Process Name Description' with a row for 'Edit | Del' and 'Invoice_Cancellation_Approval' with the description 'Approval required for invoices being cancelled with amount > threshold.'

6. Custom Notification

Setup → Notification Builder → Notification Types → New

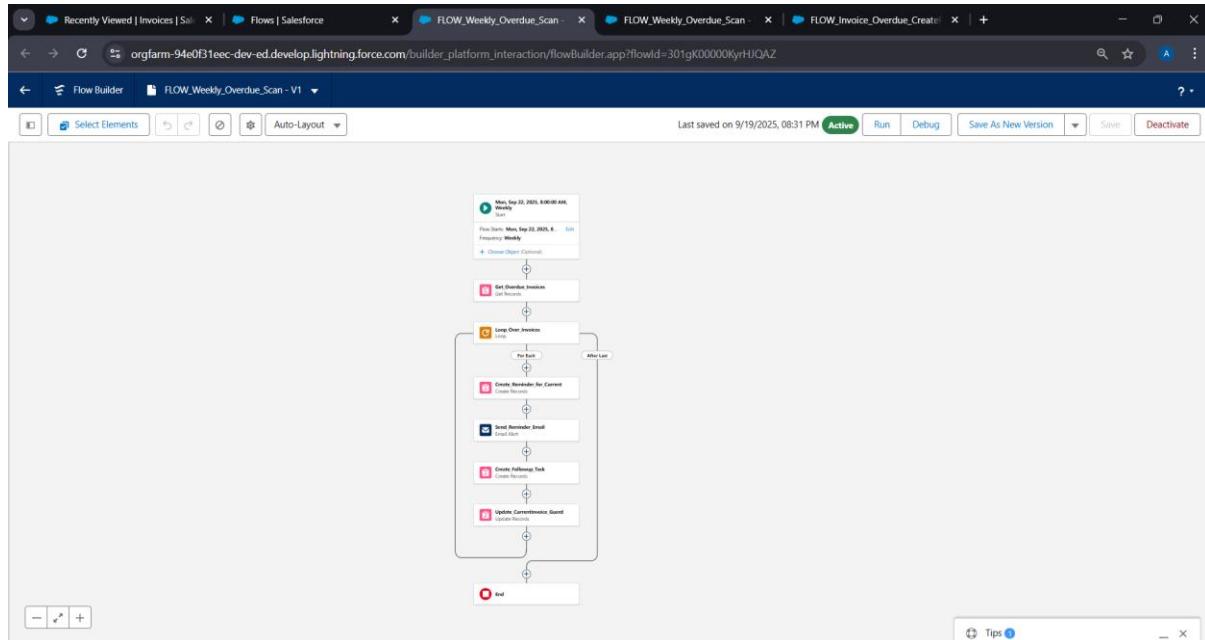
- Critical overdue invoice

The screenshot shows the 'Custom Notifications' page. The top navigation bar includes tabs for 'Recently Viewed | Invoices | Sales', 'Custom Notifications | Salesforce', 'FLOW_Weekly_Overdue_Scan -', 'FLOW_Weekly_Overdue_Scan -', 'FLOW_Invoice_Overdue_Create -', and '+'. The main content area has a search bar labeled 'Search Setup' and a sidebar with a 'Setup' icon and a 'Search' bar containing 'custom n'. The main panel title is 'Custom Notifications' with a 'SETUP' icon. Below it is a note: 'When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.' A 'Custom Notification Types' section is present with a 'New' button. A table lists notification types:

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Critical Overdue Invoice	Critical_Overdue_Invoice		✓	✓
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	✓

 The URL at the bottom of the page is <https://orgfarm-94e0f31ecc-dev-ed.develop.lightning.force.com/lightning/setup/CustomNotifications/home>.

7. Tasks



Phase 4 completed with all process and ready to go for phase 5.

Phase 5: Apex Programming

1. Apex Trigger

- Setup->Object Manager->Invoice/Payment->Trigger
 - Invoice Trigger
 - Payment Trigger

The screenshot shows the Salesforce Object Manager interface for the 'Invoice' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a table titled 'Triggers' with one item: 'InvoiceTrigger'. The table has columns for Label, API Version, Size Without Comments, and Modified By. The 'Label' column shows 'InvoiceTrigger', 'API Version' is 64.0, 'Size Without Comments' is 293, and it was modified by 'Ayush Saysikmal' on 9/20/2025, 10:53 AM.

LABEL	API VERSION	SIZE WITHOUT COMMENTS	MODIFIED BY
InvoiceTrigger	64.0	293	Ayush Saysikmal, 9/20/2025, 10:53 AM

The screenshot shows the Salesforce Object Manager interface for the 'Payment' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a table titled 'Triggers' with one item: 'PaymentTrigger'. The table has columns for Label, API Version, Size Without Comments, and Modified By. The 'Label' column shows 'PaymentTrigger', 'API Version' is 64.0, 'Size Without Comments' is 495, and it was modified by 'Ayush Saysikmal' on 9/20/2025, 10:54 AM.

LABEL	API VERSION	SIZE WITHOUT COMMENTS	MODIFIED BY
PaymentTrigger	64.0	495	Ayush Saysikmal, 9/20/2025, 10:54 AM

2.Apex Class

- Setup->Apex Class->New Apex Class
 - Invoice Handler
 - Payment Handler

The screenshot shows the Salesforce Setup interface with the search bar set to 'apex'. The 'Apex Classes' section is selected. A specific class named 'InvoiceHandler' is displayed in the center. The class detail page includes tabs for 'Edit', 'Delete', 'Download', 'Security', and 'Show Dependencies'. The code editor contains the following Apex code:

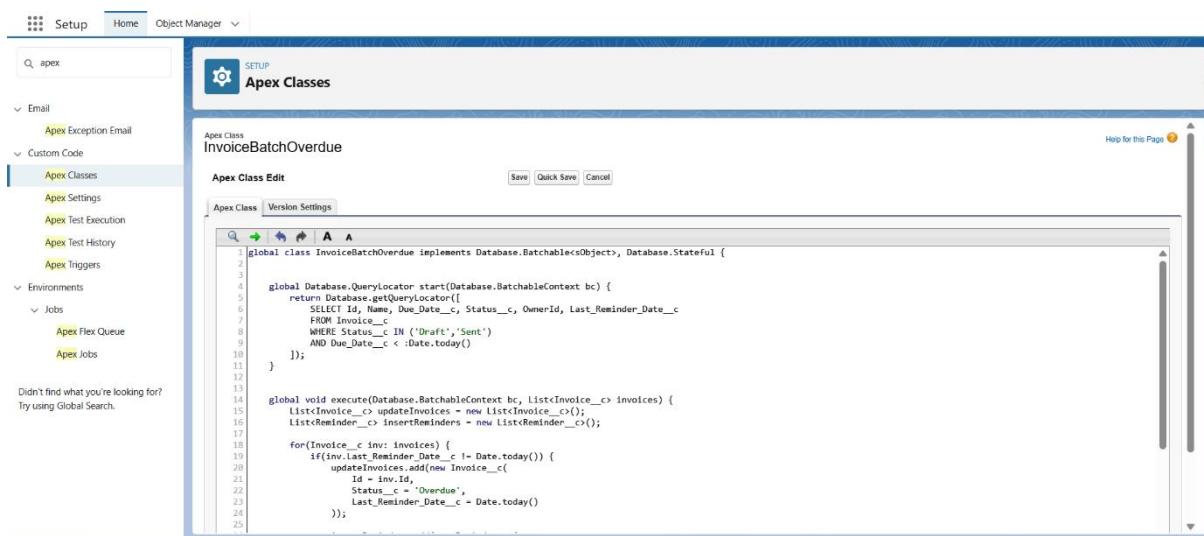
```
1 public with sharing class InvoiceHandler {
2     public static void beforeInsert(List<Invoice__c> newInvoices) {
3         Set<Id> custIds = new Set<Id>();
4         for(Invoice__c ex : newInvoices) {
5             if(ex.Customer__c != null && ex.Invoice_Date__c != null && ex.Amount__c != null) {
6                 custIds.add(ex.Customer__c);
7             }
8         }
9         if(custIds.isEmpty()) return;
10    }
11    Map<String, Id> existingMap = new Map<String, Id>();
12    for(Invoice__c ex : [SELECT Id, Customer__c, Invoice_Date__c, Amount__c
13        WHERE Customer__c IN :custIds]) {
14        String key = ex.Customer__c + ex.Invoice_Date__c + ex.Amount__c;
15        existingMap.put(key, ex.Id);
16    }
17    for(Invoice__c inv : newInvoices) {
18        String key = inv.Customer__c + inv.Invoice_Date__c + inv.Amount__c;
19        if(existingMap.containsKey(key)) {
20            inv.addError('Duplicate invoice for this customer with same date and amount');
21        }
22    }
23}
24
25
```

The screenshot shows the Salesforce Setup interface with the search bar set to 'apex'. The 'Apex Classes' section is selected. A specific class named 'PaymentHandler' is displayed in the center. The class edit page includes tabs for 'Save', 'Quick Save', and 'Cancel'. The code editor contains the following Apex code:

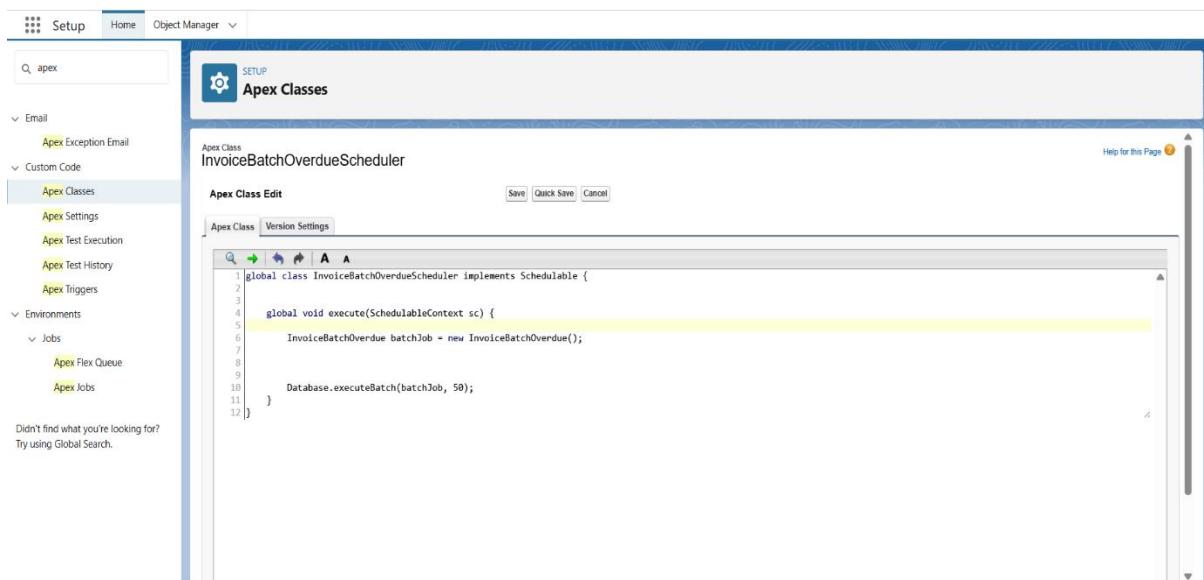
```
1 public with sharing class PaymentHandler {
2     public static void updateInvoicePaymentStatus(Set<Id> invoiceIds) {
3         if(invoiceIds == null || invoiceIds.isEmpty()) return;
4         Map<Id, Decimal> paidMap = new Map<Id, Decimal>();
5         for(AggregateResult ar : [
6             SELECT Invoice__c invId, SUM(Amount_Paid__c) sumPaid
7             FROM Payment__c
8             WHERE Invoice__c IN :invoiceIds AND Payment_Status__c = 'Completed'
9             GROUP BY Invoice__c
10        ]) {
11            paidMap.put((Id)ar.get('invId'), (Decimal)ar.get('sumPaid'));
12        }
13
14        List<Invoice__c> invoicesToUpdate = new List<Invoice__c>();
15        for(Invoice__c inv : [SELECT Id, Amount__c, Status__c FROM Invoice__c WHERE Id IN :invoiceIds]) {
16            Decimal paid = paidMap.containsKey(inv.Id) ? paidMap.get(inv.Id) : 0;
17            String newStatus;
18
19            if(inv.Amount__c != null && paid >= inv.Amount__c) newStatus = 'Paid';
20            else if(paid > 0) newStatus = 'Partially Paid';
21            else newStatus = inv.Status__c;
22
23            invoicesToUpdate.add(inv);
24        }
25    }
26}
```

3. Batch Apex

- **Setup->Apex Classes->New Class**
 - **Invoice Batch Overdue**
 - **Invoice Batch Overdue Scheduler**



```
global class InvoiceBatchOverdue implements Database.Batchable<sObject>, Database.Stateful {  
    global Database.QueryLocator start(Database.BatchableContext bc) {  
        return Database.getQueryLocator(  
            "SELECT Id, Name, Due_Date__c, Status__c, OwnerId, Last_Reminder_Date__c  
            FROM Invoice__c  
            WHERE Status__c IN ('Draft', 'Sent')  
            AND Due_Date__c < :Date.today()  
        );  
    }  
  
    global void execute(Database.BatchableContext bc, List<Invoice__c> invoices) {  
        List<Invoice__c> updateInvoices = new List<Invoice__c>();  
        List<Reminder__c> insertReminders = new List<Reminder__c>();  
  
        for(Invoice__c inv: invoices) {  
            if(inv.Last_Reminder_Date__c != Date.today()) {  
                updateInvoices.add(new Invoice__c(  
                    id: inv.Id,  
                    Status__c: 'Overdue',  
                    Last_Reminder_Date__c = Date.today()  
                ));  
            }  
        }  
    }  
}
```



```
global class InvoiceBatchOverdueScheduler implements Schedulable {  
    global void execute(SchedulableContext sc) {  
        InvoiceBatchOverdue batchJob = new InvoiceBatchOverdue();  
  
        Database.executeBatch(batchJob, 50);  
    }  
}
```

4. Scheduled Apex

- **Setup->Scheduled Jobs->New Job**
 - **Invoice Age Monthly**
 - **Invoice Overdue Nightly**

The screenshot shows the 'Schedule Apex' page in the Salesforce setup. The job name is 'InvoiceAgingMonthly' and the apex class is 'InvoiceAgingScheduler'. The schedule is set to 'Monthly' with a frequency of 'On day 1 of every month'. The start date is 9/20/2025 and the end date is 9/21/2025. The preferred start time is 2:00 AM.

Schedule Apex

Schedule an Apex class that implements the Schedulable interface to be automatically executed on a specified interval.

Job Name: **InvoiceAgingMonthly**

Apex Class: **InvoiceAgingScheduler**

Schedule Using: Schedule Builder Cron Expression

Schedule Apex Execution

Frequency: Weekly Monthly

On day **1** of every month

Start: **9/20/2025** [9/21/2025]

End: **9/21/2025** [9/21/2025]

Preferred Start Time: **2:00 AM**

Exact start time will depend on job queue activity.

The screenshot shows the 'Schedule Apex' page in the Salesforce setup. The job name is 'InvoiceOverdueNightly' and the apex class is 'InvoiceBatchOverdueScheduler'. The schedule is set to 'Cron Expression' with the value '0 0 2 * * ?'. The exact start time will depend on job queue activity.

Schedule Apex

Schedule an Apex class that implements the Schedulable interface to be automatically executed on a specified interval.

Job Name: **InvoiceOverdueNightly**

Apex Class: **InvoiceBatchOverdueScheduler**

Schedule Using: Schedule Builder Cron Expression

Cron Expression: **0 0 2 * * ?**

Exact start time will depend on job queue activity.

5. Queueable Apex

- **Setup->Apex classes->New Classes**
 - **Invoice Reminder Queuable**

The screenshot shows the Salesforce Setup interface with the 'Apex Classes' tab selected. The main content area displays the code for the 'InvoiceReminderQueueable' class. The code implements the Queueable interface and performs a query to find specific invoice records based on reminder IDs.

```
public class InvoiceReminderQueueable implements Queueable {
    private List<Id> reminderIds;
    public InvoiceReminderQueueable(List<Id> ids) {
        reminderIds = ids;
    }
    public void execute(QueueableContext ctx) {
        List<Reminder__c> reminders = new List<Reminder__c>();
        SELECT Id, Invoice__c, Invoice__r.Name, Invoice__r.Customer__r.Name, Invoice__r.Amount__c, OwnerId
        FROM Reminder__c
        WHERE Id IN :reminderIds
    };
    // Collect Finance Team emails
    Set<String> financeEmails = new Set<String>();
    Group g = [SELECT Id FROM Group WHERE Name='Finance_Team' LIMIT 1];
    for(GroupMember gm : [SELECT UserOrGroupId FROM GroupMember WHERE GroupId = :g.Id]) {
        User u = [SELECT Email FROM User WHERE Id = :gm.UserOrGroupId];
        financeEmails.add(u.Email);
    }
    List<Messaging.SingleEmailMessage> mails = new List<Messaging.SingleEmailMessage>();
```

6. Test Classes

- **Setup->Apex Classes->New Classes**
 - **Invoice Test Class**

The screenshot shows the Salesforce Setup interface with the 'Apex Classes' tab selected. The main area displays the code for the 'InvoiceApexTest' class. The code is annotated with comments explaining the steps of the test:

```
1  @isTest static void testInvoiceDuplicate() {
2      // Step 1 - Create a test Account (Customer)
3      Account a = new Account(Name = 'Test Customer');
4      insert a;
5
6      // Step 2 - Insert first Invoice
7      Invoice__c inv1 = new Invoice__c(
8          Customer__c = a.Id,
9          InvoiceDate__c = Date.today(),
10         Amount__c = 100,
11         Status__c = 'Draft'
12     );
13     insert inv1;
14
15     // Step 3 - Attempt to insert duplicate Invoice
16     Invoice__c inv2 = new Invoice__c(
17         Customer__c = a.Id,
18         InvoiceDate__c = Date.today(),
19         Amount__c = 100,
20         Status__c = 'Draft'
21     );
22 }
```


Phase 6: User Interface Development

1. Lightning App Builder

- Setup → App Manager → New

The screenshot shows the 'Lightning Experience App Manager' page. At the top, there's a search bar with 'app man' and two buttons: 'New Lightning App' and 'New External Client App'. On the left, a sidebar lists 'Apps' and 'App Manager' (which is selected). Under 'External Client Apps', there's a link to 'External Client App Manager'. A message says ' Didn't find what you're looking for? Try Using Global Search.' The main area displays a table with 28 items, sorted by App Name. The columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Visible in L... . The table shows various apps like Bolt Solutions, Community, Content, Data Cloud, Data Manager, Digital Experiences, InvoicePro, Lightning Usage App, Marketing CRM Classic, My Service Journey, Platform, Queue Management, Sales, Sales Cloud Mobile, and Sales Console. The last row is a note about the Salesforce Chatter social network.

<https://orgfarm-94e0f31eecc-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home>

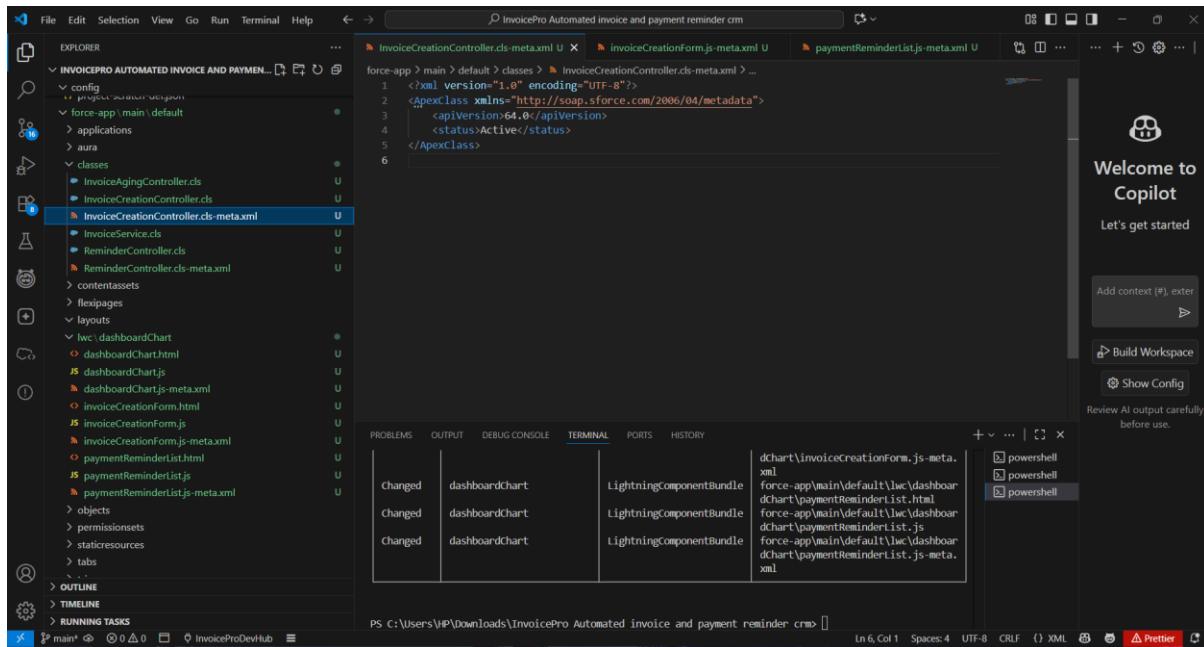
- Setup → App Manager → InvoicePro → Edit → Add tabs (Invoice, Payment, Reminders).

The screenshot shows the 'InvoicePro' app home screen. At the top, there's a navigation bar with 'Home', 'Invoices', 'Payments', 'Reminders', 'Accounts', 'Reports', 'Dashboards', and 'Finance Dashboard'. Below the navigation is a section titled 'Approvals' with the sub-instruction 'Use Approvals to manage approval submissions and approval work items.' There are four cards: 'Manage All Pending Approval Submissions' (View, cancel, or recall in-progress approval submissions.), 'Manage All Flow Approval Processes' (View or edit flow approval processes, or view details about orchestration runs.), 'Review My Approval Work Items' (View and complete your assigned approval work items.), and 'Manage My Approval Submissions' (View the current status of your approval submissions, or recall an in-progress approval submission.).

<https://orgfarm-94e0f31eecc-dev-ed.lightning.force.com/lightning/n/standard-ApprovalsHome>

2.Apex With LWC

- Vscode



The screenshot shows the VS Code interface with the following details:

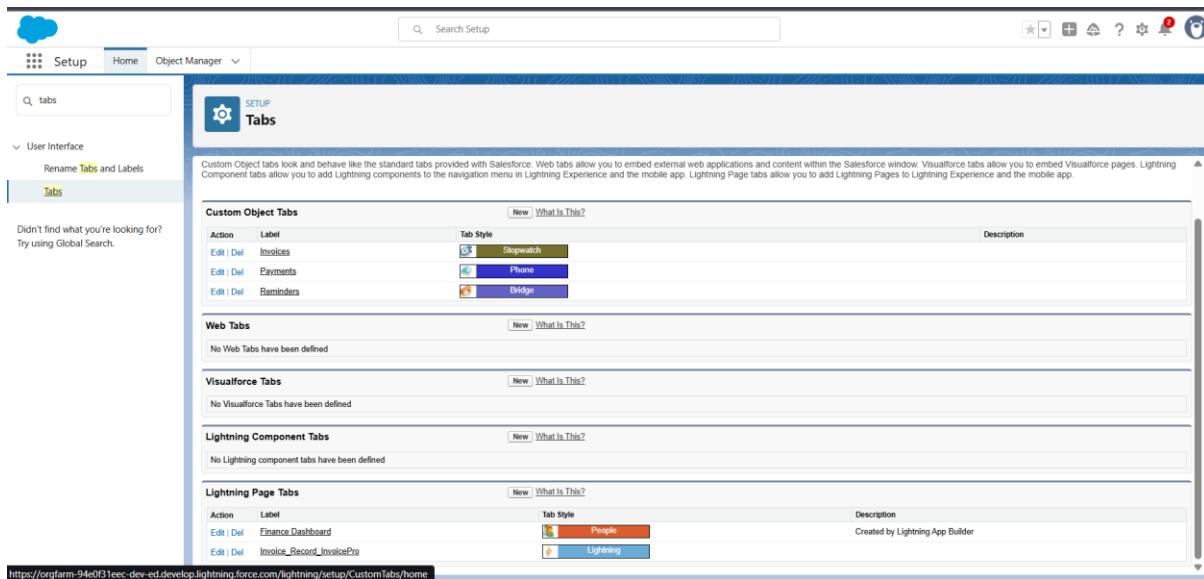
- EXPLORER** view: Shows the project structure for "INVOICEPRO AUTOMATED INVOICE AND PAYMENT". It includes files like InvoiceAgingController.cls, InvoiceCreationController.cls, InvoiceService.cls, ReminderController.cls, and various XML files for classes, layouts, and components.
- EDITOR**: An open file is "InvoiceCreationController.cls-meta.xml" with the following content:

```
<?xml version="1.0" encoding="UTF-8"?>
<ApexClass xmlns="http://soap.sforce.com/2006/04/metadata">
    <apiVersion>64.0</apiVersion>
    <status>Active</status>
</ApexClass>
```

- TERMINAL**: Shows command-line output related to the component bundle and dashboard chart.
- OUTPUT**: Shows logs for "powershell" tasks.
- PROBLEMS**: Shows no errors or warnings.
- COPYRIGHT**: Shows the path: PS C:\Users\HP\Downloads\InvoicePro Automated invoice and payment reminder crm\

3.Tabs

- Setup → Quick find → Tabs



The screenshot shows the Salesforce Setup interface with the following details:

- Setup** tab is selected.
- Object Manager** tab is also visible.
- Search Bar**: Search term: "tabs".
- Custom Object Tabs** section:
 - Shows three tabs: Invoices (Stopwatch), Payments (Phone), and Reminders (Bridge).
 - Action columns: Edit | Del.
 - Description column: (empty)
- Web Tabs** section:
 - No Web Tabs have been defined.
- Visualforce Tabs** section:
 - No Visualforce Tabs have been defined.
- Lightning Component Tabs** section:
 - No Lightning component tabs have been defined.
- Lightning Page Tabs** section:
 - Shows two tabs: Finance Dashboard (People) and Invoice_Record_InvoicePro (Lightning).
 - Action columns: Edit | Del.
 - Description column: Created by Lightning App Builder.

4. Quick Actions

- Setup → Object Manager → Invoice__c → Buttons, Links, and Actions → New Action
 - New Invoice

The screenshot shows the Salesforce Object Manager interface for the 'Invoice' object. The left sidebar has a 'Buttons, Links, and Actions' section selected. The main area displays a table titled 'Buttons, Links, and Actions' with 11 items, sorted by label. The columns show the action name, label, page type, and editor type. Actions include Accept, Clone, Delete, Edit, Invoices Tab, List, New, New Invoice, New Payment, New Reminder, and View.

Action	Label	Type	Editor
Accept	Accept	Standard page	
Clone	Clone	Standard page	
Delete	Delete	Standard page	
Edit	Edit	Standard page	
Invoices Tab	Tab	Standard page	
List	List	Standard page	
New	New	Standard page	
New Invoice	New_Invoice	Create a Record	Action Layout Editor
New Payment	New_Payment	Create a Record	Action Layout Editor
New Reminder	New_Reminder	Create a Record	Action Layout Editor
View	View	Standard page	

5. Reports

- Setup → Reports → Create report

The screenshot shows the InvoicePro application's report management interface. The left sidebar has sections for Reports, Recent, Created by Me, Private Reports, Public Reports, All Reports, Folders, All Folders, Created by Me, Shared with Me, and Favorites. The main area displays a table of recent reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. Reports listed include Overdue Invoices Report, Sample Flow Report: Screen Flows, Pending Payment Reminders, and New Invoices Report.

Report Name	Description	Folder	Created By	Created On	Subscribed
Overdue Invoices Report		Finance	Ayush Saysikmal	9/21/2025, 3:30 AM	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	9/10/2025, 5:11 AM	
Pending Payment Reminders		Finance	Ayush Saysikmal	9/21/2025, 3:35 AM	
New Invoices Report		Finance	Ayush Saysikmal	9/21/2025, 3:32 AM	

The screenshot shows the Salesforce Chatter Analytics interface. The top navigation bar includes Home, Chatter, People, Groups, Files, Invoices, Reminders, Payments, Report Builder, and Analytics. The left sidebar has sections for Analytics, Home, and Collections, with a note to 'Create a collection to start organizing your analytics content.' The main area is titled 'Browse > Finance' and contains a search bar and filter buttons for All Items, Reports, and Folders. Below these are four sorting filters: Created By (Anybody), Created On (Any Date), Last Modified By (Anybody), and Last Modified On (Any Date). A table titled '0 Items Selected (Limit 50)' shows three items recently viewed: 'Overdue Invoices Report', 'Pending Payment Reminders', and 'New Invoices Report'. Each item has a checkbox, a preview icon, and columns for Type, Created By, Created On, Last Modified By, and Last Modified On, all showing 'Ayush Saysikmal' and '1 hour ago'.

6. Dashboard

- Setup → Dashboards → New Dashboard

The screenshot shows the InvoicePro Finance Dashboard. The top navigation bar includes Home, Invoices, Payments, Reminders, Accounts, Reports, Dashboards, and Finance Dashboard. The dashboard itself has several sections: 'Cash Flow Insights' (0-30 days: 0, 31-60 days: 0, 61-90 days: 0, >90 days: 0), 'Standard.RecentItems (0)', and 'Sample Flow Report: Screen Flows'. The 'Screen Flows' section contains a chart placeholder with the message 'We can't draw this chart because there is no data.' At the bottom, there are links for 'View Report' and 'As of Today at 2:20 AM'.

The screenshot shows the InvoicePro Finance Dashboard. At the top, there is a navigation bar with links for Home, Invoices, Payments, Reminders, Accounts, Reports, Dashboards, and Finance Dashboard. A search bar is located at the top center. On the right side of the header, there are several icons for starred items, adding, help, and user profile.

The main content area is titled "Finance Dashboard" and shows "As of Sep 21, 2025, 3:47 AM" and "Viewing as Ayush Saisikmal". Below this, there are two sections:

- Overdue Invoices Report**: This section displays a message: "We can't draw this chart because there is no data." It includes a "View Report (Overdue Invoices Report)" link and a timestamp "As of Sep 21, 2025, 3:47 AM".
- Pending Payment Reminders**: This section also displays a message: "We can't draw this chart because there is no data." It includes a "View Report (Pending Payment Reminders)" link and a timestamp "As of Sep 21, 2025, 3:47 AM".

At the bottom right of the dashboard, there are buttons for Refresh, Edit, and Subscribe.

Phase 7: Integration & Internal Access

1. Platform Events

- Setup-> Platform Events-> New Platform Events
 - Payment_Received_e

The screenshot shows the Salesforce setup interface for creating a new platform event. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and sections for MuleSoft, Einstein, Custom Code, Integrations, Security, and Platform Events. The 'Platform Events' section is selected. The main content area displays the 'Platform Event Definition Detail' for 'Payment_Received__e'. It shows the singular label 'Payment_Received__e', plural label 'Payment_Received__es', object name 'Payment_Received__e', API name 'Payment_Received__e', event type 'High Volume', publish behavior 'Publish Immediately', and deployment status 'Deployed'. The 'Standard Fields' section lists fields like 'Created By', 'Created Date', 'Event UUID', and 'Replay ID'. The 'Custom Fields & Relationships' section lists fields like 'Invoice Id', 'Payment Amount', 'Payment Date', and 'Payment Status'. A note at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

- Custom Objects

The screenshot shows the Salesforce setup interface for custom objects. The left sidebar navigation includes 'Integrations', 'Platform Events', and sections for Security, Platform Encryption, Encryption Settings, and Key Management. The 'Platform Events' section is selected. The main content area displays the 'Custom Fields & Relationships' section for a custom object named 'Payment_Status'. It lists fields like 'Invoice Id', 'Payment Amount', 'Payment Date', and 'Payment Status'. Below this are sections for 'Triggers' (no triggers defined) and 'Subscriptions' (empty). A note at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

2. Change Data Capture

- Setup->Change Data Capture->Available Entity>Selected Entity

The screenshot shows the Salesforce Setup interface with the 'Change Data Capture' section selected. The left sidebar includes links for Apps, Integrations, and Identity. A search bar at the top is set to 'change'. The main content area has a header 'SETUP Change Data Capture'. It explains that the entities selected here generate change event notifications on the default standard channel. Below this, there are two sections: 'Available Entities' (listing various objects like Account, Account Clean Info, etc.) and 'Selected Entities' (listing Payment and Invoice). A central vertical slider bar is visible between the two sections.

3. External Services/Salesforce Connect

- **Setup-> External Data Sources->New External Data Source**
 - **ERP System**

The screenshot shows the Salesforce Setup interface with the 'External Data Sources' section selected. The left sidebar includes links for Email, Apps (with 'External Client Apps' expanded), and Integrations (with 'External Data Sources' selected). A search bar at the top is set to 'external'. The main content area has a header 'SETUP External Data Sources'. It provides information about accessing data from other orgs and third-party databases. A table lists existing external data sources, including one named 'ERP_System' which is connected to Amazon DynamoDB via Salesforce Connect OData 2.0. The URL for this source is listed as 'https://erp.example.com/odata'.

- **Setup-> External Objects->New External Objects**

- **ERP Invoice**
- **ERP Payment**

The screenshot shows the Salesforce Setup interface under the External Objects section. The left sidebar includes options like Email, Apps, Integrations, and External Data Sources. The External Objects section is selected. A table lists two external objects:

Action	Label	Deployed	External Data Source	Description
Edit Erase	ERP Invoice	✓	ERP_System	
Edit Erase	ERP Payment	✓	ERP_System	

4. All Sites Settings

- **Setup->All Sites**

The screenshot shows the Salesforce Setup interface under the All Sites section. The left sidebar includes Feature Settings, User Interface, and Security. The Digital Experiences section is selected. A table lists one site:

Action	Name	Description	Framework	URL	Status
Workspaces Builder	CustomerInvoices		Aura	https://orfarm-54e0f01sec-dev-ed-develop.my.site.com	Preview

5. Process Builder To Skip Flows

1. Total Paid Amount

- Setup->Object Manager->invoice->Field and Relationship

The screenshot shows the 'Object Manager' interface for the 'Invoice' object. In the top navigation bar, 'SETUP > OBJECT MANAGER' is selected. On the left sidebar, 'Fields & Relationships' is highlighted. The main content area displays the 'Custom Field Definition Detail' for the 'Total Paid Amount' field. The field information includes:

- Field Label: Total Paid Amount
- Field Name: Total_Paid_Amount
- API Name: Total_Paid_Amount_c
- Description: (empty)
- Help Text: (empty)
- Data Owner: (empty)
- Field Usage: (empty)
- Data Sensitivity Level: (empty)
- Compliance Categorization: (empty)

On the right side, the 'Object Name' is listed as 'Invoice'. Below the field information, there is a 'Roll-Up Summary Options' section with the following settings:

- Data Type: Roll-Up Summary
- Summarized Object: Payment
- Field to Aggregate: Payment_Amount_Paid
- Filter Criteria: Payment_Status equals Completed
- Summary Type: SUM

At the bottom of the page, the URL is shown: <https://orgfarm-94e031eec-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002LR45/fieldsAndRelationships/00NgK00001X0qf1/view>.

- Report Subscriptions

The screenshot shows the 'InvoicePro' application interface. At the top, there is a navigation bar with links: Home, Invoices, Payments, Reminders, Accounts, Reports, Dashboards, and Finance Dashboard. The 'Reports' menu is currently selected. Below the navigation bar, the title 'Report: Invoices New Invoices Report' is displayed. On the left, a sidebar shows 'Total Records' with a value of 2. A dropdown menu labeled 'Invoice: Invoice Number' is open, showing two options: 'INV-1001' and 'INV-1002'. The main content area displays a table with the following data:

Invoice: Invoice Number
1 INV-1001
2 INV-1002

2. Overdue Invoice Reminder

1. Create an Email Template

- Setup → Email → Classic Email Templates

The screenshot shows the 'Classic Email Templates' page in Salesforce. A new template named 'Overdue Invoice Reminder' is being created. The template details include:

Email Template Detail	Value
Email Templates from Salesforce	Unfilled Public Classic Email Templates
Email Template Name	Overdue Invoice Reminder
Template Unique Name	Overdue_Invoice_Reminder
Encoding	Unicode (UTF-8)
Author	Ayush Sayiskmal [Change]
Description	
Created By	Ayush Sayiskmal 9/22/2025, 5:18 AM
Modified By	Ayush Sayiskmal 9/22/2025, 5:18 AM

The email template body contains the following text:

Subject: Invoice [Invoice Number] is Overdue
Plain Text Preview:
Hello [{Owner Name}].
Invoice [{Invoice__c.Name}] for Amount [{Invoice__c.Amount__c}] was due on [{Invoice__c.Due_Date__c}].
Please take necessary action.

2 . Create a Workflow Rule

- Setup → Workflow Rules → New Rule

The screenshot shows the 'Workflow Rules' page in Salesforce. A new workflow rule named 'Email Status' is being created. The rule details are as follows:

Workflow Rule Detail	Value
Rule Name	Active ✓
Description	[Invoice: Status NOTEQUALTO Posted] AND [Invoice: Due Date LESSTHAN 9/22/2025]
Created By	Ayush Sayiskmal 9/22/2025, 5:21 AM
Modified By	Ayush Sayiskmal 9/22/2025, 5:23 AM

The 'Workflow Actions' section shows an immediate workflow action for an 'Email Alert' type, which is described as 'For alert email'. A warning message states: 'You cannot add new time triggers to an active rule. Deactivate This Rule'.

3. Add Workflow Action – Email Alert

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing 'Process Automation' and 'Workflow Actions'. Under 'Workflow Actions', 'Email Alerts' is selected. A search bar at the top left contains the text 'workflow'. The main content area is titled 'Email Alerts' and shows a record for 'For alert email'. The 'Email Alert Detail' section includes fields for Description ('For alert email'), Unique Name ('Email_alert'), From Email Address ('Current User's email address'), Recipients ('Invoice Owner'), Additional Emails (''), and Created By ('Ayush.Sayakmal'). Buttons for Edit, Delete, and Clone are available. The 'Email Template' section shows 'Overdue Invoice Reminder' assigned to the 'Object' 'Invoice'. The 'Modified By' field shows 'Ayush.Sayakmal' with a timestamp of '9/22/2025, 5:22 AM'. Below the main detail section are four sections: 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', 'Entitlement Processes Using This Email Alert', and 'Flows Using This Email Alert'. Each section has a help link and a note indicating it is currently not used by any processes.

So This is for phase 7 now ready to go phase 8....

Phase 8: Data Management & Deployment

1. Sample Data (CSV Files)

- **Accounts.csv**
- **Invoices.csv**
- **Payments.csv**

A1	Name,Phone,BillingStreet,BillingCity>Contact Last Name
1	Name,Phone,BillingStreet,BillingCity>Contact Last Name
2	Account A,+919876543210,1 Main St,Mumbai,DummyA
3	Account B,+919123456780,2 Park Ave,Delhi,DummyB
4	
5	
6	
7	
8	
9	
10	
11	
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14	
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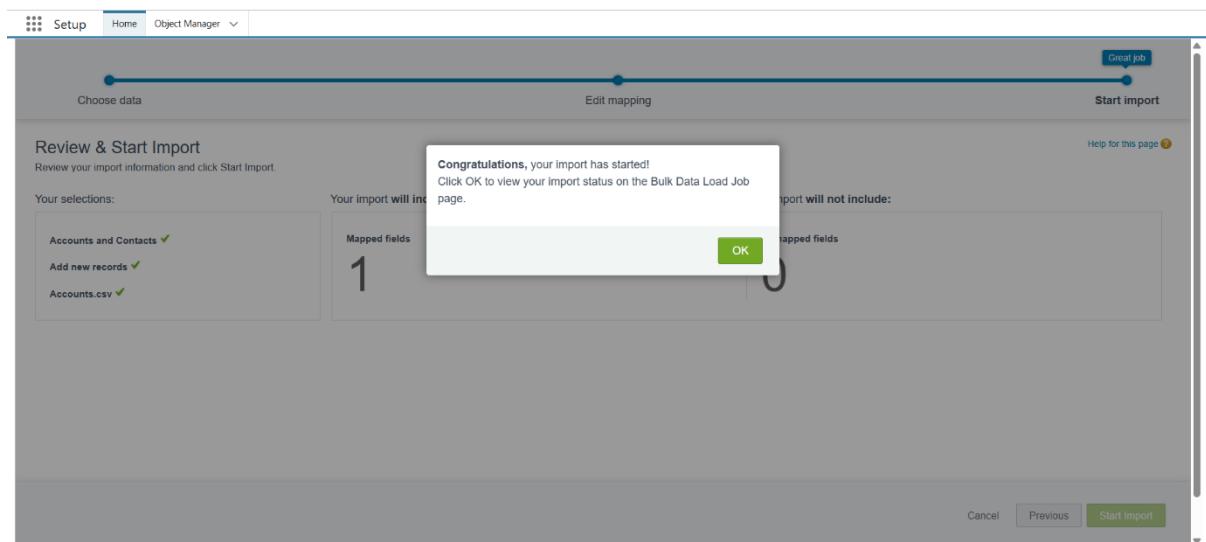
A1	Amount_Paid__c,Payment_Date__c,Payment_Status__c,Payment_Method__c,Transaction_ID__c,Invoice__c
1	Amount_Paid__c,Payment_Date__c,Payment_Status__c,Payment_Method__c,Transaction_ID__c,Invoice__c
2	300,2025-09-05,Paid,Bank Transfer,TXN001,INV-TEST-001
3	1500,2025-09-10,Paid,Credit Card,TXN002,INV-TEST-002
4	
5	
6	
7	
8	
9	
10	
11	
12	
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14	
15	
16	
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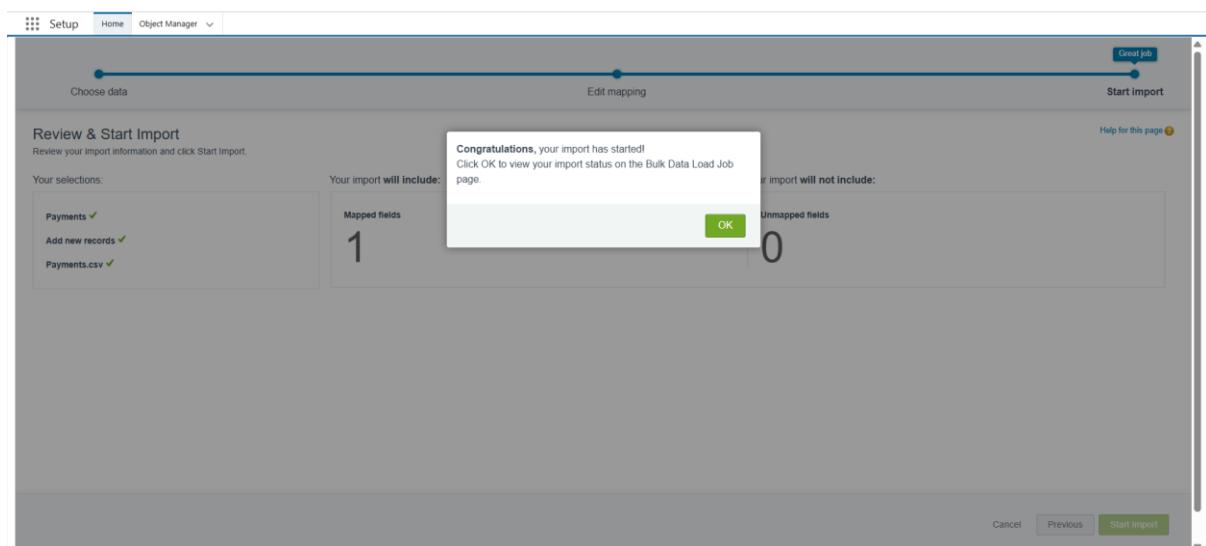
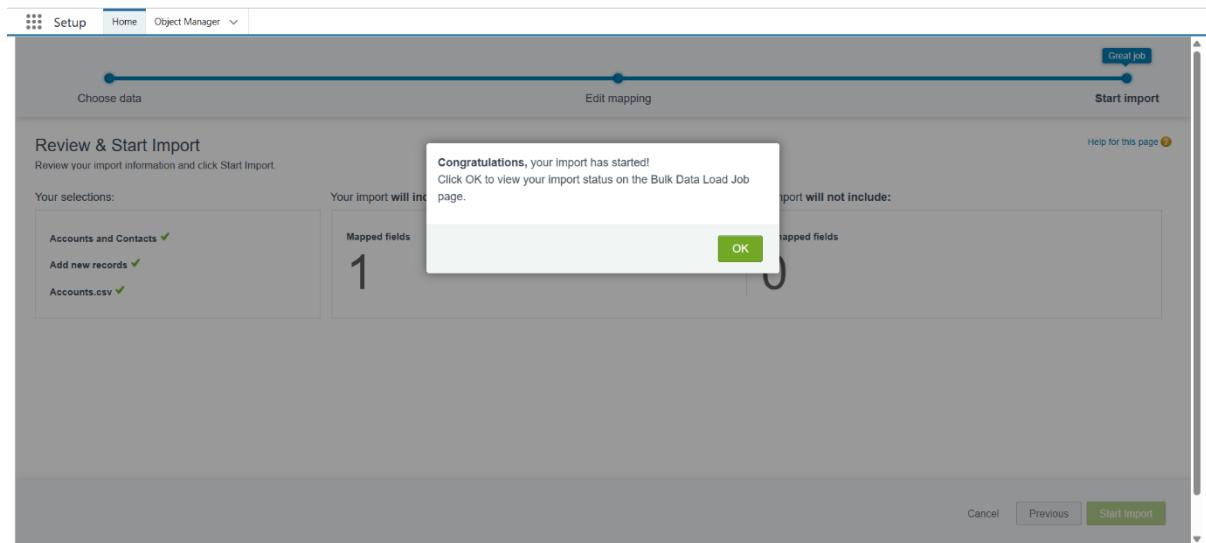
Invoices																								
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	
1	Invoice_Number__Text_c	Invoice_Date__c	Due_Date__c	Amount__c	Status__c	Customer__c																		
2	INV-TEST-001,2025-09-01,2025-09-30,1000,Draft,Account A																							
3	INV-TEST-002,2025-08-01,2025-08-15,1500,Partial,Account A																							
4	INV-TEST-003,2025-07-01,2025-07-31,800,Partial,Account B																							
5																								
6																								
7																								
8																								
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2. Data Import Wizard

- **Setup: Setup → Data → Data Import Wizard → Launch Wizard**

- **Accounts** → Choose Accounts → Upload `Accounts.csv` → Map fields → Start Import.
- **Invoices** → Custom Object → `Invoice__c` → Upload `Invoices.csv` → Map Customer__c by Account Name → Start Import.
- **Payments** → Custom Object → `Payment__c` → Upload `Payments.csv` → Map `Invoice__c` by Invoice Number → Start Import.





3. Duplicate Rules

- **Setup: Setup → Duplicate Management → Matching Rules / Duplicate Rules**
 - **Matching Rule**
 - **Duplicate Rule**

The screenshot shows the Matching Rules page in the Salesforce Setup interface. The title bar says "d SETUP Matching Rules". Below it, the section title is "Invoice Number + Customer Matching". The "Matching Rule Detail" table contains the following information:

Object	Invoice
Rule Name	Invoice Number + Customer Matching
Unique Name	Invoice_Number_Customer_Matching
Description	
Matching Criteria	(Invoice: Invoice_Number_Text EXACT MatchBlank = FALSE) AND (Invoice: Customer EXACT MatchBlank = FALSE)
Status	Active
Created By	Anush Saylimal 9/25/2025, 1:17 AM
Modified By	Anush Saylimal 9/25/2025, 1:17 AM

At the bottom right of the page, there is a "Help for this Page" link.

The screenshot shows the Duplicate Rules page in the Salesforce Setup interface. The title bar says "d SETUP Duplicate Rules". Below it, the section title is "Block Duplicate Invoices". The "Duplicate Rule Detail" table contains the following information:

Role Name	Block Duplicate Invoices
Description	Block Duplicate Invoices
Object	Invoice
Record-Level Security	Enforce sharing rules
Action On Create	Allow
Action On Edit	Allow
Alert Text	Use one of these records?
Active	✓
Matching Rule	Invoice Number + Customer Matching Mapped
Conditions	
Created By	Anush Saylimal 9/25/2025, 1:20 AM

On the right side of the table, there are sections for "Operations On Create" and "Operations On Edit", each with "Alert" and "Report" checkboxes. The "Operations On Create" section has both checkboxes checked, while the "Operations On Edit" section has only "Report" checked. The "Matching Criteria" field shows the same logic as the matching rule: "(Invoice: Invoice_Number_Text EXACT MatchBlank = FALSE) AND (Invoice: Customer EXACT MatchBlank = FALSE)".

4. Data Export

- **Setup: Setup → Data → Data Export**

The screenshot shows the 'Data Export' page under the 'Data' section of the Salesforce Setup. A scheduled export named 'Monthly Export Service' is listed, set to run on 9/25/2025 at 9:25:025. The export file is encoded in ISO-8859-1 (General US & Western European, ISO-LATIN-1). There are buttons for 'Export Now' and 'Schedule Export'.

This screenshot is identical to the one above, but it includes a 'download' link next to the file name 'WE_80Ogk00000BEg5FUAT_1.ZIP' in the table.

5.Unmanaged Packages

The screenshot shows the 'Package Manager' page under the 'Packaging' section of the Salesforce Setup. An unmanaged package named 'InvoiceManagement_Unmanaged' is listed. It was created by 'Avneet.Savikmal' on 9/25/2025 at 9:44 AM. The package has no components defined.

Action	File Name	File Size
download	WE_80Ogk00000BEg5FUAT_1.ZIP	3.8K

6. Vscode & SFDX

Phase 9: Reporting, Dashboards & Security Review

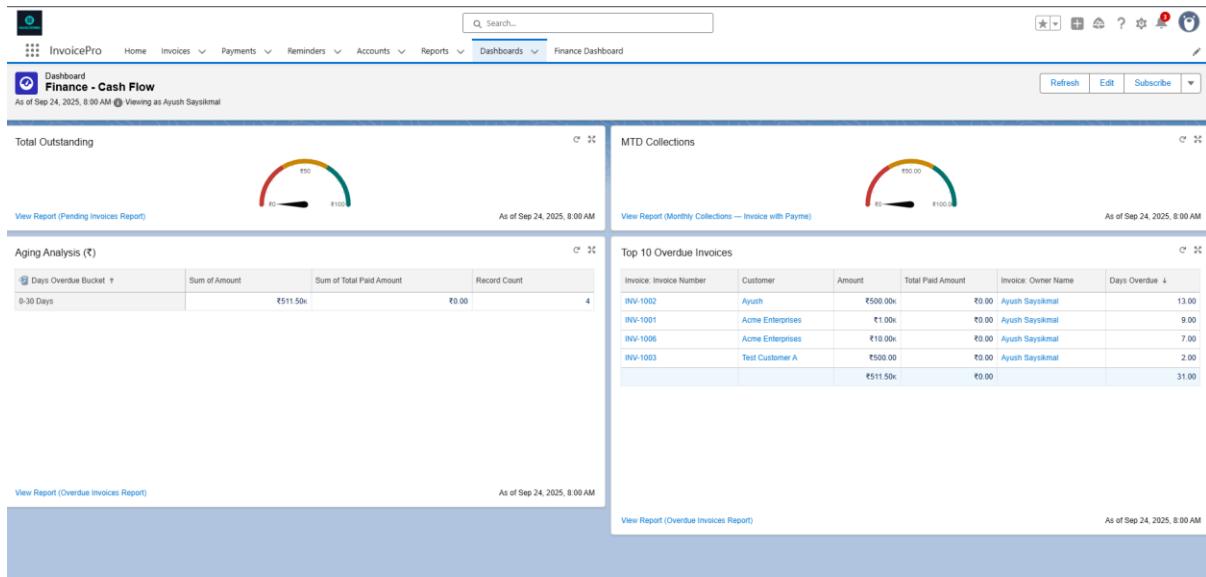
1. Reports And Report Types

- **Setup → Reports → New Report**
 - **Pending Invoices Report**
 - **Overdue Invoices Report**
 - **Monthly Collections Report**
 - **Invoice Change History**

The screenshot shows the InvoicePro software interface with the 'Reports' tab selected. On the left, there's a sidebar with categories like 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites'. The main area displays a table of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains several entries, including 'Sample Flow Report: Screen Flows', 'Duplicate Invoice Check', 'Monthly Collections — Invoice with Payne', 'Invoice Change History', 'Overdue Invoices Report', 'Pending Invoices Report', 'New Invoices Report', 'Pending Payment Reminders', and 'Overdue Invoices Report'.

2. Dashboards

- **Dashboards → New Dashboard → Name Finance - Cash Flow → Folder Finance Dashboards**
 - **Finance - Cash Flow**
 - **Total Outstanding**
 - **MTD Collections**
 - **Top 10 Overdue Invoices**
 - **Aging Analysis**



3. Sharing Settings

- **Setup → Sharing Settings**

The screenshot shows the Salesforce Setup Sharing Settings page. The left sidebar includes a search bar, a security section with a "Sharing Rule Access Report" link, and a "Sharing Settings" link which is currently selected. Below the sidebar, a message says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Sharing Settings" and lists various objects along with their sharing rules:

Object	Public Read Only	Private
Delivery Confirmation Setup	Private	Private
Enablement Program	Private	Private
Engagement Channel Type	Private	Private
External Managed Account	Private	Private
Finance Balance Snapshot	Private	Private
Finance Transaction	Private	Private
Flow	Private	Private
Flow Interview	Private	Private
Flow Interview Log	Private	Private
Flow Test Result	Public Read Only	Private
Fulfillment Order	Public Read/Write	Private
Image	Private	Private
Incident	Private	Private
Inventory Reservation	Public Read/Write	Private
Invoice	Private	Private
Legal Entity	Private	Private
List Email	Private	Private
Location	Public Read/Write	Private
Location Group	Public Read/Write	Private
Location Shipping Carrier Method	Public Read Only	Private
Macro	Private	Private
Matrix Lineage	Private	Private

4. Field Level Security

- Setup → Object Manager → Payment/Invoice→ Fields & Relationships → Set Field Level Security

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A modal window titled 'Set Field-Level Security' is open for the 'Transaction ID' field. The field label is 'Transaction ID' and the data type is 'Text(255)'. The 'Field-Level Security for Profile' section lists various user profiles with checkboxes for 'Visible' and 'Read-Only' permissions. Most profiles have 'Visible' checked and 'Read-Only' unchecked.

User Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[https://orgfarm-94e0f31ecc-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fui%2Fcommon%2Fconfig%2FStandardFieldAttributes%2fe%3Fid%3D00NGk00001qjDAA%26type%3D01lgK000002lVNp%26retURL%3D%25f00NgK00001qjDAA%25...](https://orgfarm-94e0f31ecc-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fui%2Fcommon%2Fconfig%2FStandardFieldAttributes%2Fe%3Fid%3D00NGk00001qjDAA%26type%3D01lgK000002lVNp%26retURL%3D%25f00NgK00001qjDAA%25)

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A modal window titled 'Set Field-Level Security' is open for the 'Amount Paid' field. The field label is 'Amount Paid' and the data type is 'Currency(16, 2)'. The 'Field-Level Security for Profile' section lists various user profiles with checkboxes for 'Visible' and 'Read-Only' permissions. All profiles have 'Visible' checked and 'Read-Only' unchecked.

User Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[https://orgfarm-94e0f31ecc-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fui%2Fcommon%2Fconfig%2FStandardFieldAttributes%2fe%3Fid%3D00NGk00001qjDAA%26type%3D01lgK000002lVNp%26retURL%3D%25f00NgK00001qjDAA%25...](https://orgfarm-94e0f31ecc-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fui%2Fcommon%2Fconfig%2FStandardFieldAttributes%2fe%3Fid%3D00NGk00001qjDAA%26type%3D01lgK000002lVNp%26retURL%3D%25f00NgK00001qjDAA%25)

5. OWD/Sharing Settings

- Setup → Sharing Settings → set Invoice__c OWD = Private

The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and navigation links for Security, Sharing Settings, and Global Search. The main area is titled "Sharing Settings" and contains a table for "Invoice__c". The table has columns for "Object" (e.g., Finance Transaction, Flow, Flow Interview, etc.) and "Sharing Rule Access" (e.g., Private, Public Read Only, Public Read/Write). The "Invoice__c" row is highlighted in blue. The "Sharing Rule Access" column for "Invoice__c" is also highlighted in blue, indicating it is being edited.

6. Login IP Ranges

- Setup → Profiles → Officer Profile

The screenshot shows the Salesforce Profiles page. The left sidebar has a search bar and navigation links for Users and Profiles. The main area is titled "Profiles" and contains sections for "Login IP Ranges", "Enabled Apex Class Access", "Enabled Visualforce Page Access", "Enabled External Data Source Access", and "Enabled Named Credential Access". Under "Login IP Ranges", there is a table with columns for Action, IP Start Address, IP End Address, and Description. A single entry is shown: Action: Edit | Del, IP Start Address: 49.36.41.0, IP End Address: 49.36.41.255, Description: All Day.

7. Audit Trail

- Setup → View Setup Audit Trail

The screenshot shows the 'View Setup Audit Trail' page in the Salesforce Setup interface. The page title is 'View Setup Audit Trail'. A message at the top says, 'The last 20 entries for your organization are listed below. You can download your organization's setup audit trail for the last six months (Excel .csv file).'. Below this is a table titled 'View Setup Audit Trail' with columns: Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The table lists 20 audit entries from September 2025, such as changes to Apex classes, Lightning components, and duplicate rules.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/25/2025, 2:14:00 AM PDT	ayushsaysikmal8905@agentforce.com		Changed ReminderController Apex Class code	Apex Class	
9/25/2025, 2:14:00 AM PDT	ayushsaysikmal8905@agentforce.com		Changed InvoiceCreationController Apex Class code	Apex Class	
9/25/2025, 2:14:00 AM PDT	ayushsaysikmal8905@agentforce.com		Changed InvoiceApexTest Apex Class code	Apex Class	
9/25/2025, 2:13:59 AM PDT	ayushsaysikmal8905@agentforce.com		Changed dashboardChart Lightning Web Component	Lightning Components	
9/25/2025, 2:13:59 AM PDT	ayushsaysikmal8905@agentforce.com		Changed dashboardChart Lightning Web Component	Lightning Components	
9/25/2025, 2:13:59 AM PDT	ayushsaysikmal8905@agentforce.com		Changed dashboardChart Lightning Web Component	Lightning Components	
9/25/2025, 1:23:11 AM PDT	ayushsaysikmal8905@agentforce.com		Requested an export	Data Export	
9/25/2025, 1:20:16 AM PDT	ayushsaysikmal8905@agentforce.com		For the 011gk000002LR45 duplicate rule Block Duplicate Invoices, changed "Active" from "false" to "true"	Duplicate Rule	
9/25/2025, 1:20:04 AM PDT	ayushsaysikmal8905@agentforce.com		For duplicate rule Block Duplicate Invoices, changed matching rules.	Duplicate Rule	
9/25/2025, 1:20:04 AM PDT	ayushsaysikmal8905@agentforce.com		Created new 011gk000002LR45 duplicate rule "Block Duplicate Invoices". Set "Record-Level Security" to "Entire sharing rules"	Duplicate Rule	
9/25/2025, 1:17:32 AM PDT	ayushsaysikmal8905@agentforce.com		Invoice matching rule, Invoice Number + Customer Matching, activating by Ayush Sysikmal	Matching Rule	

The screenshot shows an Excel spreadsheet titled 'SetupAuditTrail1758805139615.xlsx' with the file path 'C:\Users\ayushsaysikmal\Downloads\SetupAuditTrail1758805139615.xlsx'. The spreadsheet contains the same 20 audit entries from the previous screenshot, listed in a table with columns: Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The data is identical to the one shown in the Salesforce screenshot.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/25/2025	ayushsaysikmal8905@agentforce.com		Changed R Apex Class	Apex Class	
9/25/2025	ayushsaysikmal8905@agentforce.com		Changed Ir Apex Class	Apex Class	
9/25/2025	ayushsaysikmal8905@agentforce.com		Changed Ir Apex Class	Apex Class	
9/25/2025	ayushsaysikmal8905@agentforce.com		Changed d Lightning Components	Lightning Components	
9/25/2025	ayushsaysikmal8905@agentforce.com		Changed d Lightning Components	Lightning Components	
9/25/2025	ayushsaysikmal8905@agentforce.com		Changed d Lightning Components	Lightning Components	
9/25/2025	ayushsaysikmal8905@agentforce.com		Requested Data Export		
9/25/2025	ayushsaysikmal8905@agentforce.com		For the 01 Duplicate Rule		
9/25/2025	ayushsaysikmal8905@agentforce.com		For duplciate Duplicate Rule		
9/25/2025	ayushsaysikmal8905@agentforce.com		Created ne Duplicate Rule		
9/25/2025	ayushsaysikmal8905@agentforce.com		Invoice mx Matching Rule		
9/25/2025	ayushsaysikmal8905@agentforce.com		For matchi Matching Rule		
9/25/2025	ayushsaysikmal8905@agentforce.com		For matchi Matching Rule		
9/25/2025	ayushsaysikmal8905@agentforce.com		For matchi Matching Rule		
9/25/2025	ayushsaysikmal8905@agentforce.com		For matchi Matching Rule		
9/25/2025	ayushsaysikmal8905@agentforce.com		Created ne Matching Rule		
9/23/2025	salesforce.com, inc.		Max number of streaming topics		
9/23/2025	ayushsaysikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaysikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaysikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaysikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaysikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaysikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaysikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaysikmal8905@agentforce.com		Permision Manage Users		
9/23/2025	ayushsaysikmal8905@agentforce.com		Changed p Manage Users		
9/23/2025	ayushsaysikmal8905@agentforce.com		Changed p Manage Users		