

SALESFORCE QUICK REVIEW –

Eco-friendly lifestyle Tracker App

1. Project Title

Eco Tracker – Salesforce Sustainability Activity Tracker

2. Business Requirement Document

The Eco Tracker App enables users to log and track environmentally sustainable activities such as Tree Planting, Recycling, and Saving Energy.

It assigns points based on activity type, stores photos and geolocation, and updates total user contributions.

Functional Requirements:

1. Log Eco Activities

Capture eco-friendly actions with fields: Type, Name, Date, Photo Upload

2. Automatic Point Assignment

- Assign points based on activity type:
 - Tree Planting → 10 points
 - Recycling → 7 points
 - Save Energy → 5 points
- Handled via Record-Triggered Flows.

3. Track User Contributions

- Store total earned points for each user using a custom field: Total_Points__c on the User object.

4. Automated Email Notifications

- Send a personalized Thank You Email to users after activity submission with: user name, activity type, date, and points earned.

5. Photo Proof of Activity

- Enable users to attach photos via the Files related list to validate submissions.

6. Visual Reports and Dashboards

- **User-wise Performance:** Total points per user
- **Activity Type Summary:** Activities grouped by type
- **Monthly Trends:** Activities grouped by month for trend analysis

Non-Functional Requirements:

Secure access based on user profiles:

Secure access control was implemented using user profiles and field-level security to restrict visibility and actions based on roles (e.g., Eco Users vs Admins).

Error logging and handling using Flow Interviews

Error handling was managed using Flow Interviews, enabling admins to monitor and debug flow executions when issues occur.

3.High Level Design (Implementation Document

1. Architecture Overview

Platform: Salesforce CRM (Lightning + Classic)

Users/Roles:

System Administrator – Full control over configuration and reporting

Eco User – Submits eco activities and views own contributions

2. Core Modules & Objects

Module	Custom Object	Key Fields / Relationships
Eco Activities	Eco_Activity__c	Type, Name, Date, Description, Points, Performed_By, Photo
Users	User (Standard)	Total_Points, Badge_Level, First_Login_Date, Location
Reports/Dashboards	N/A	Based on custom report types and dashboard visuals
Automation	Flows (No Code)	Auto-point assignment, total points update, email alerts

3.User Roles & Permissions

Profile Name	CRUD Permissions (Custom Object)	Tab Visibility
System Admin	Full Access on all objects	All tabs default ON
Eco_User_Profile	RCE on Eco_Activity__c, R on User object	Eco Activity, Reports ON

4.Record Types & Page Layouts

Object	Record Type	Description	Page Layout
Eco_Activity__c	Eco Action	For all user-submitted eco activities	Eco Activity Layout
User	N/A	Standard User Profile	Custom fields section added

5.. Automation (Flows)

Flow Name	Type	Purpose
Assign Points Flow	Record-Triggered	Assign points based on activity type (e.g., Tree = 10)
Update Total Points Flow	Record-Triggered	Sums user points and updates Total_Points__c on User
Thank You Email Flow	Record-Triggered	Sends email after each activity is submitted

6.Email Templates & Alerts

Template Name	Trigger	Purpose
Thank You Email	On Eco Activity creation	Acknowledges eco action with details
Badge Level Upgrade (future)	Based on points	Congratulates users for earning badges

7. Reports & Dashboards

Reports:

- Eco Activities by User
- Activities by Type
- Monthly Activity Summary

Dashboards:

- **User-Wise Performance** (Bar chart: User vs Points)
- **Activity Type Summary** (Pie chart: Types)
- **Monthly Trends** (Line graph: Date-wise count)

8. Data & Testing

- **Sample Records:**
 - 10+ Eco Activities

- **Test Cases:**
 - Email alerts sent on activity submission
 - Points are correctly assigned
 - Report filters by user/date/type work correctly

9. Deployment Notes

- Built entirely on Salesforce Developer Org
- No Apex or third-party apps used
- No change sets used (admin-level point-and-click setup)
- Flows, Profiles, Reports, and Dashboards documented
- Email alerts tested and delivered successfully

Step by step process document:

<https://drive.google.com/file/d/1HAU0dEQacWSwSB2jl1KSceRoL0FVVoar/view?usp=drivesdk>

4. Tools Related

1. Salesforce Flow Builder (Automation)

Trigger:

- The flow starts automatically when a new Eco_Activity__c record is created.

Decision Element (Check Type):

- It checks the value of Type__c (Tree Planting, Recycling, or Save Energy).

Assignment (Assign Points):

- **Based on the type:**
 - Tree Planting → 10 points
 - Recycling → 7 points
 - Save Energy → 5 points

Update Records:

- The flow updates the Points__c field of the same activity record.

Get Records (All Activities by This User):

- The flow fetches all previous activities submitted by the same user using Performed_By__c.

Assignment (Sum Points):

- The points from each record are added to a variable TotalPointsForUser.

Get User Record:

- Retrieves the User record related to the activity.

Update User Record:

- Updates the user's Total_Points__c field with the new total.

Send Email:

- An automatic "Thank You" email is sent to the user with:
 - Their name
 - Activity type
 - Date
 - Points earned

5. Testing Results**Test Case 1: Tree Planting Activity Flow**

Go to App Launcher → Eco Activity → New

Fill the form:

- Activity Name: Tree Planting Test
- Type__c: Tree Planting
- Date__c: Today
- Performed_By__c: Select any user

Click Save

Expected Results:

- Points__c is auto-filled with 10
- User's Total_Points__c is incremented (e.g., from 0 → 10)
- A Thank You Email is received at the user's email address
- Flow interview shows successful completion

Status: Passed

Test Summary

Successfully tested the eco activity submission flow by creating a new record and verifying automatic point assignment, user total update, and email notification.

All expected outcomes were met, and the flow executed without errors .

6. Execution through dev org**Custom Object Creation:**

- Created Eco_Activity__c object with all required fields

Flow Builder Configuration:

- Designed a Record-Triggered Flow to automate point assignment and user updates

User Interface Setup:

- Tabs for Eco Activity and Eco Tips were created
- Related lists for Files, User, and geolocation were added to page layouts

Profile & Permission Setup:

- Created a custom profile (e.g., Eco_User_Profile) with access to custom objects and fields

Reports & Dashboards:

- Built standard reports and a dashboard directly in the org
- No third-party tools or Visualforce components were required

Email Notifications:

- Configured flow to send automated thank-you emails on record creation
- Tested with org users using real or test email addresses

7. Deployment

Step 1: Object and Field Creation

A custom object Eco_Activity__c is created to capture eco activity data. Custom fields such as activity name, type, date, points, description, user reference, photo upload (via related Files), and geolocation are added. Additionally, a Total_Points__c field is created on the standard User object to track each user's total points.

Step 2: Component Migration Using Change Sets

Flows, email templates, reports, dashboards, and custom tabs are packaged into an Outbound Change Set and deployed to the production org. After uploading, the change set is validated and deployed from Inbound Change Sets in the target org.

Step 3: Post-Deployment Testing

Post-deployment testing includes creating sample records to verify point calculation, user point updates, photo uploads, email notifications, and the accuracy of reports and dashboards.

8. Release notes

Version: 1.0

Platform: Salesforce Lightning

Release Date: [Insert Date]

1. Custom Object and Fields

- Created a custom object: Eco_Activity__c to log user-submitted eco-friendly activities.
- Added key custom fields:
 - Activity_Name__c (Text)
 - Type__c (Picklist: Tree Planting, Recycling, Save Energy)
 - Date__c, Points__c, Description__c
 - Performed_By__c (Lookup to User)

2. Flows

- Built a Record-Triggered Flow using Flow Builder.
- Automatically assigns points based on selected activity type.
- Calculates and updates total points for each user by looping through their related activities.
- Updates Total_Points__c on the User object accordingly.

3. File Uploads and Camera Support

- Enabled photo uploads through the Files related list to serve as visual proof of the activity.
- Camera_Access__c checkbox added to indicate whether photo capture is used.

4. User Points Tracking & Reporting

- Added a Total_Points__c field on the User object.
- Created key reports to track engagement and performance:
 - User-Wise Performance
 - Activity Type Summary
 - Monthly Activity Trends
- Built interactive dashboards for real-time visual insights.

5. Email Automation

- Configured automated "Thank You" emails using Email Alerts and Flow Actions.
- Emails dynamically include user name, activity type, date, and points earned.

Summary

The Eco-Friendly Lifestyle Tracker is a custom Salesforce application designed to help users log and track their eco-friendly actions, such as Tree Planting, Recycling, and Saving Energy. The system automatically assigns points based on the type of activity and updates each user's total contribution score in real time. Users can also upload photos .

Admins and coordinators can monitor overall impact using visual dashboards and detailed reports that display user-wise performance, activity type distribution, and monthly participation trends. The application uses Salesforce's point-and-click tools including Custom Objects, Flows, Email , Profiles, Reports, and Dashboards .

Built entirely in Salesforce Lightning, this app promotes sustainability, encourages engagement and demonstrates strong proficiency in Salesforce admin functionalities.

Retro Spection:

<https://drive.google.com/file/d/1HB06KpuqLy1KFp4LhZT2mFbQP0aBg2Tj/view?usp=drivesdk>

