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1. Project Overview – Detailed Version:

Purpose:

To streamline and automate the film production workflow for **Trendy Kings Film** using Salesforce CRM. The CRM will centralize actor management, scheduling, resource allocation, and communication, reducing manual errors and improving productivity.

Key Features / Business Needs:

1. Actor Management & Casting Tracking:

- o Maintain actor profiles, contact info, availability, and casting history.
- Track audition outcomes, assigned roles, and contract dates.

2. Shoot Scheduling & Calendar Integration:

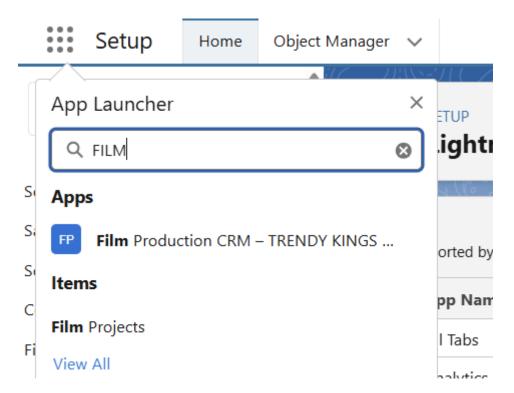
- Visualize shoot dates for multiple projects.
- o Avoid double-booking of actors, crew, or locations.

3. Resource Allocation:

- Manage crew assignments, equipment, and location bookings.
- o Track who/what is assigned to which shoot.

4. Automated Notifications & Alerts:

- Email notifications for schedule changes, actor assignments, or task deadlines.
- Alerts for conflicts in schedules or missing information.



2. Objectives – Detailed Version:

Main Goals / Business Value:

1. Reduce Double-Booking of Actors:

• Ensure actors, crew, and locations are scheduled without conflicts.

o Automated scheduling checks prevent overlaps.

2. Improve Communication Between Production Crew:

- o Centralized platform for updates and notifications.
- o Team members receive instant alerts for schedule changes.

3. Track Production Progress Centrally:

- o Monitor shoot completion, actor assignments, and pending tasks.
- o Enables managers to make informed decisions quickly.

4. Automated Email Notifications:

- Emails triggered when actors are assigned, schedules change, or tasks are updated.
- Keeps all stakeholders informed without manual intervention

Phase 1: Problem Understanding & Industry Analysis:

1. Requirement Gathering

Activities:

1. Requirement Gathering:

- o Interview producers, directors, and crew to understand current processes.
- Identify pain points: double-booking, missed deadlines, lack of centralized info.

2. Stakeholder Analysis:

- o List all stakeholders: Producers, Directors, Actors, Crew, Admins.
- o Map roles and responsibilities for the CRM system.

3. Business Process Mapping:

- o Document current process (manual Excel sheets, calls, emails).
- o Map optimized process using Salesforce CRM automation.

4. AppExchange Exploration:

- o Research available apps or components for film production management.
- o Identify features to complement your custom CRM.

Phase 2: Org Setup & Configuration:

Purpose:

To configure the Salesforce org to support Trendy Kings Film CRM with proper company settings, users, business hours, holidays, and sandbox environment for development and testing.

1. Salesforce Edition & Company Profile Setup

Steps:

- 1. Log in to Salesforce.
- 2. Navigate to Setup \rightarrow Company Settings \rightarrow Company Information.

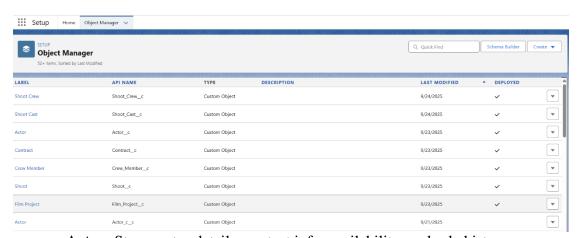
- 3. Ensure Salesforce **Edition** is appropriate (Enterprise/Professional) for production needs.
- 4. Fill in company details:
 - o Company Name: Trendy Kings Film
 - Default Currency
 - o Default Locale and Language
 - Fiscal Year & Time Zone

Phase 3: Data Modeling & Relationships:

Purpose:

To define how data is stored, related, and displayed in Salesforce for Trendy Kings Film, ensuring proper management of actors, shoots, crew, and locations.

Custom Objects:



- Actor: Stores actor details, contact info, availability, and role history.
- **Shoot:** Stores film shoot details, including date, location, assigned actors, and crew.
- Crew: Stores production team members and their roles.

Actor (Actor__c)

- Age (Number)
- Skills (Long Text)
- Availability (Picklist: Available, Not Available, Booked)
- Daily Rate (Currency)

Film Project (Film_Project__c)

- Genre (Picklist)
- Budget (Currency)
- Status (Picklist: Planned, Shooting, Post-Prod, Completed)

Shoot (Shoot__c)

- Location (Text)
- Start Date (Date)
- End Date (Date)
- Status (Picklist: Scheduled, In Progress, Completed, Cancelled)
- Film Project (Lookup \rightarrow Film Project)

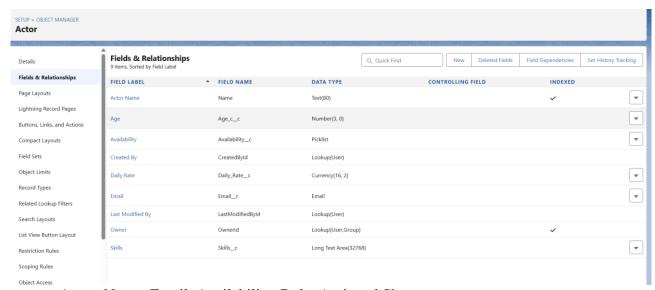
Crew Member (Crew_Member__c)

- Role (Picklist: Camera, Sound, Makeup, Production)
- Contact Info (Phone/Text)

Contract (Contract__c)

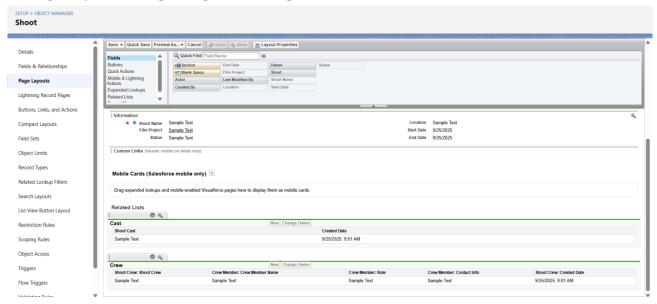
- $Actor (Lookup \rightarrow Actor)$
- Film Project (Lookup → Film Project)
- Payment Terms (Text)
- Status (Picklist: Draft, Signed, Paid)

Fields & Record Types:



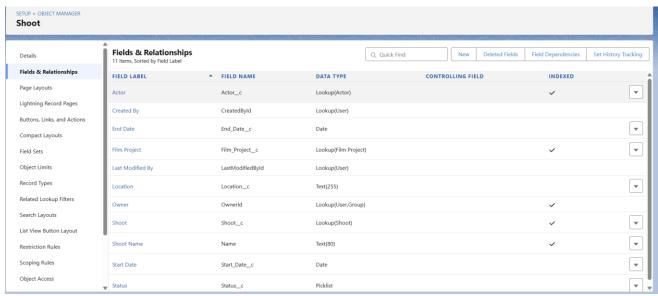
- Actor: Name, Email, Availability, Role, Assigned Shoots.
- Shoot: Shoot Name, Date, Location, Assigned Actors, Crew.
- Record Types: Different shoot types (Outdoor, Studio).

Page Layouts & Lightning Record Pages:



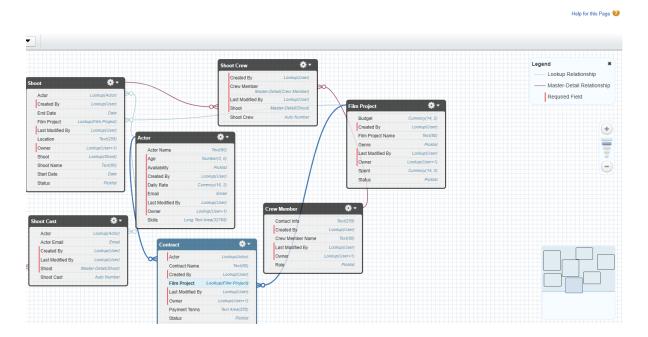
- Logical arrangement of fields and related lists.
- Lightning pages with Highlights Panel, Related Lists, and custom components.

Relationships:



• Lookup Relationship: Actor ↔ Shoot (an actor may participate in multiple shoots).

Schema Builder:



• Visual representation of all custom objects and relationships.

Phase 4: Process Automation (Admin)

Purpose:

To automate repetitive tasks, enforce data integrity, and trigger notifications in Trendy Kings Film CRM for efficient production management.

Automation Components:

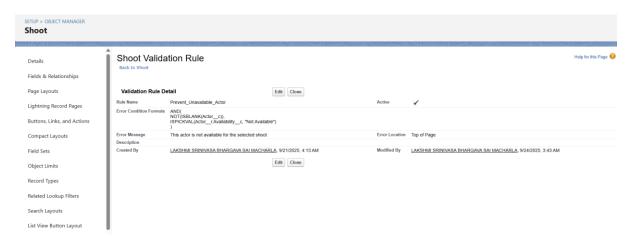
1. Validation Rules:

• Prevent assigning unavailable actor

Formula:

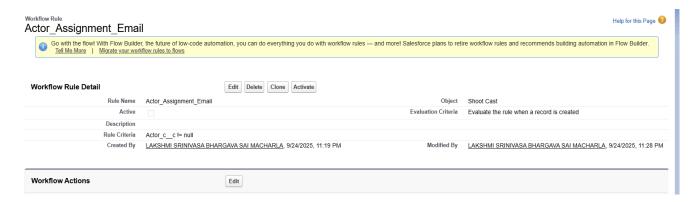
```
AND(
    NOT(ISBLANK(Lead_Actor__c)),
    ISPICKVAL(Lead_Actor__r.Availability__c, "Not Available")
)
```

• Ensures that actors marked as "Not Available" cannot be assigned to shoots.



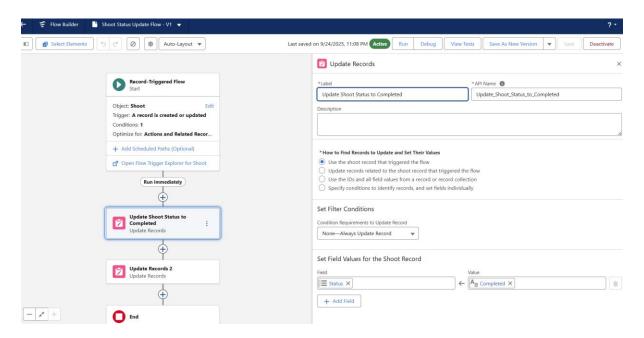
3. Workflow Rules:

- Send email when a Shoot is created and actor assigned
 - o Automatically notifies actors and production crew of new assignments.



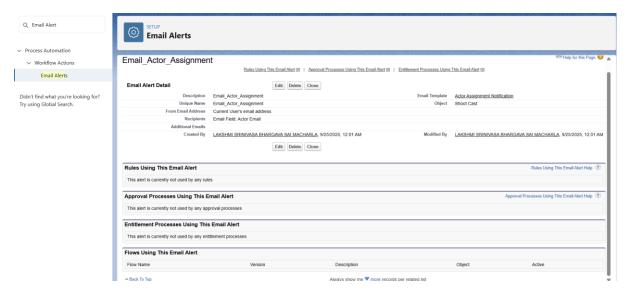
3. Flows:

- Auto-update Shoot Status to Completed
 - o Triggered when the End Date of the shoot is less than today.
 - o Automatically updates the status to "Completed" without manual intervention.



4. Email Alerts:

• Automated emails for actor assignment confirmation, shoot updates, and resource allocation.



Phase 5: Apex Programming (Developer):

Purpose:

To implement custom business logic in Trendy Kings Film CRM that cannot be achieved

through declarative automation alone. Apex ensures reliable data processing, advanced triggers, and integration with external systems.

Key Components:

1. Apex Triggers:

- Trigger: Assign Actor to Shoot
 - o Automatically populate Actor_Email__c and send notifications when a shoot record is created or updated.
- Trigger: Update Shoot Status
 - Ensures shoot status is updated based on End Date or completion of all actor assignments.

2. Apex Classes:

- **Handler Class:** Contains reusable logic for triggers, like checking actor availability, sending emails, or updating related records.
- **Utility Classes:** Can include methods for calculations, formatting data, or integration tasks.

3. SOQL / SOSL Queries:

- Retrieve records based on conditions. Examples:
- List<Actor_c> availableActors = [SELECT Id, Name FROM Actor_c WHERE Availability_c = 'Available'];
- Search multiple objects: SOSL can find actors, shoots, or locations quickly.

4. Test Classes:

- Ensure all triggers and classes work correctly and meet **Salesforce code coverage** requirements.
- Example:
 - Create a test actor and shoot → run trigger → assert that email field is auto-populated → assert that shoot status updates.

1 Handler Class – ShootCastTriggerHandler:

```
public class ShootCastTriggerHandler {
    // Method to populate Actor Email on Shoot Cast
    public static void populateActorEmail(List<Shoot_Cast__c>
    shootCastList) {
        // Collect Actor IDs from Shoot Cast records
        Set<Id> actorIds = new Set<Id>();
        for(Shoot_Cast__c sc : shootCastList) {
            if(sc.Actor_c__c != null) {
                  actorIds.add(sc.Actor_c__c);
            }
        }
        // Query Actor records once
        Map<Id, Actor c c> actorMap = new Map<Id, Actor c c> (
```

```
[SELECT Id, Email__c FROM Actor_c__c WHERE Id IN :actorIds]
);

// Populate Actor_Email__c on Shoot Cast
    for(Shoot_Cast__c sc : shootCastList) {
        if(sc.Actor_c__c != null &&
        actorMap.containsKey(sc.Actor_c__c)) {
            sc.Actor_Email__c = actorMap.get(sc.Actor_c__c).Email__c;
        }
    }
}
```

<u> 2 Trigger – Trigger AssignActor:</u>

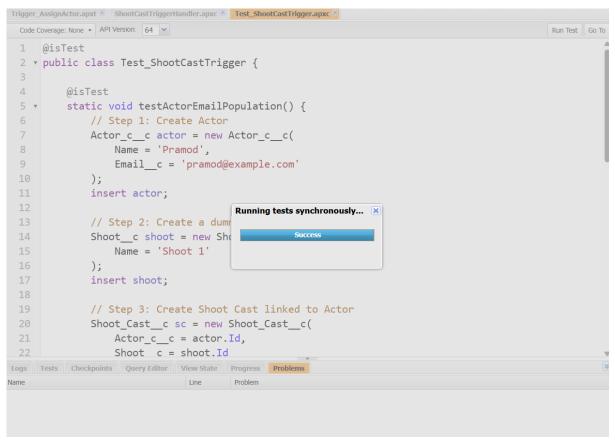
```
trigger Trigger_AssignActor on Shoot_Cast__c (before insert, before update)
{
    // Call handler method
    ShootCastTriggerHandler.populateActorEmail(Trigger.new);
}
```

• This runs before insert and update, so Actor Email c is populated automatically.

<u> 3 Test Class – Test_ShootCastTrigger:</u>

```
public class Test ShootCastTrigger {
    @isTest
    static void testActorEmailPopulation() {
        // Step 1: Create Actor
        Actor_c__c actor = new Actor_c__c(
           Name = 'Pramod',
           Email c = 'pramod@example.com'
        );
        insert actor;
        // Step 2: Create a dummy Shoot record
        Shoot c shoot = new Shoot c(
           Name = 'Shoot 1'
       );
        insert shoot;
        // Step 3: Create Shoot Cast linked to Actor
        Shoot Cast c sc = new Shoot Cast c(
           Actor c c = actor.Id,
           Shoot c = shoot.Id
        );
        insert sc;
        // Step 4: Verify Actor Email c is populated
        Shoot Cast c scAfter = [
           SELECT Actor Email c
           FROM Shoot Cast c
           WHERE Id = :sc.Id
        System.assertEquals(
            'pramod@example.com',
```

```
scAfter.Actor Email c,
            'Actor email should be auto-populated'
        );
        // Step 5: Test update scenario
        Actor_c__c actor2 = new Actor_c_ c(
            Name = 'Kiran',
            Email__c = 'kiran@example.com'
        );
        insert actor2;
        // Update Shoot Cast to new Actor
        sc.Actor_c_ c = actor2.Id;
        update sc;
        // Verify Actor Email c updated
        scAfter = [SELECT Actor Email c FROM Shoot Cast c WHERE Id =
:sc.Id];
        System.assertEquals(
           'kiran@example.com',
            scAfter.Actor Email c,
            'Actor email should update when Actor changes'
        );
    }
}
```



Phase 6: User Interface Development:

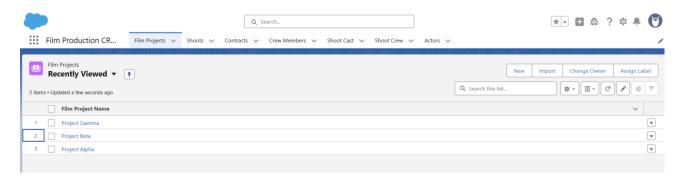
Purpose:

To design an intuitive and interactive user interface in Salesforce Lightning for Trendy Kings Film CRM, ensuring users can efficiently manage actors, shoots, crew, and locations.

Key Components:

1. Lightning App Builder:

- Custom Lightning App for Trendy Kings Film with easy navigation.
- Components added for quick access to Actors, Shoots, Crew, and Locations.

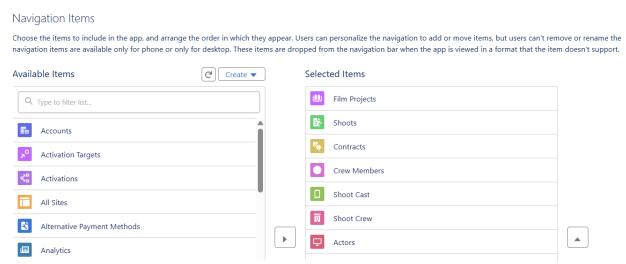


2. Record Pages:

- Custom record pages for each object (Actor, Shoot, Crew, Location).
- Includes Highlights Panel, Related Lists, Tabs, and Action Buttons.

3. Tabs:

- Separate tabs for key objects and reports.
- Example: Actors, Shoots, Crew, Contracts.



Phase 7: Integration & External Access:

Note:

This phase was not utilized in the Trendy Kings Film CRM project, as all data management and deployment were handled manually within the sandbox environment.

Phase 8: Data Management & Deployment:

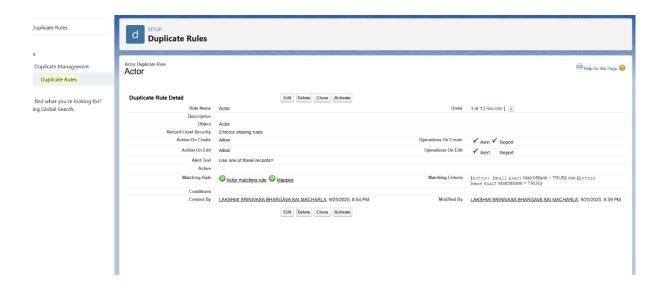
Purpose:

To efficiently manage bulk data (Actors, Shoots, Crew) and deploy configurations and customizations from sandbox to production using Salesforce tools. Ensures data integrity, reduces errors, and supports a smooth deployment process.

1. Duplicate Rules

Use Case:

Prevent creation of duplicate Actor records during import or manual entry.



Phase 9: Reporting, Dashboards & Security:

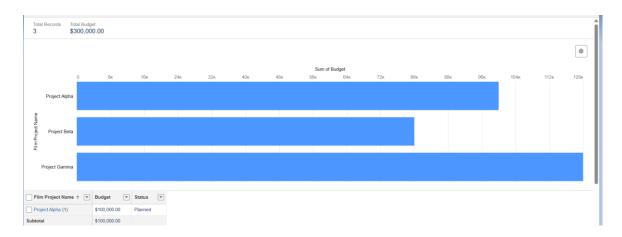
Purpose:

To monitor, analyze, and control access to Trendy Kings Film CRM data, ensuring stakeholders have the right visibility into actors, shoots, and production resources.

Key Components:

1. Reports:

- Track upcoming shoots, actor assignments, and completed shoots.
- Example: Report showing all scheduled shoots with assigned actors and locations.

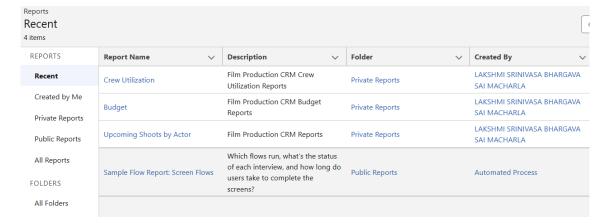


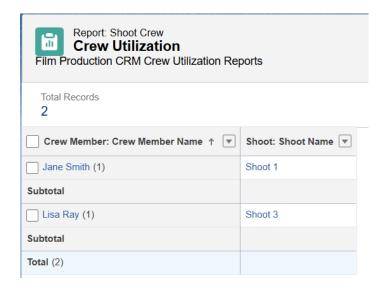
Report: Shoot Casts Upcoming Shoots by Actor Film Production CRM Reports

Total Records

8

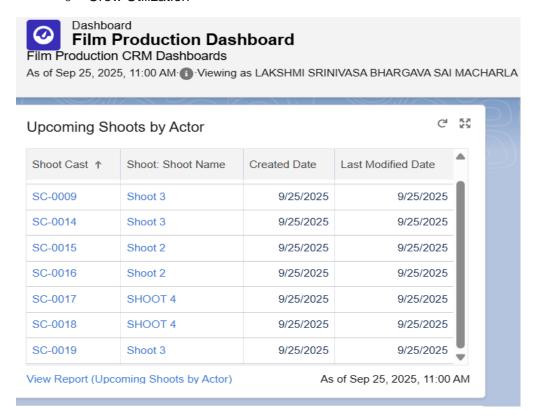
	Shoot Cast 🔻	Shoot: Shoot Name	Created Date 🔻	Last Modified Date
1	SC-0005	Shoot 1	9/24/2025	9/24/2025
2	SC-0009	Shoot 3	9/25/2025	9/25/2025
3	SC-0015	Shoot 2	9/25/2025	9/25/2025
4	SC-0014	Shoot 3	9/25/2025	9/25/2025
5	SC-0016	Shoot 2	9/25/2025	9/25/2025
6	SC-0017	SHOOT 4	9/25/2025	9/25/2025
7	SC-0018	SHOOT 4	9/25/2025	9/25/2025
8	SC-0019	Shoot 3	9/25/2025	9/25/2025

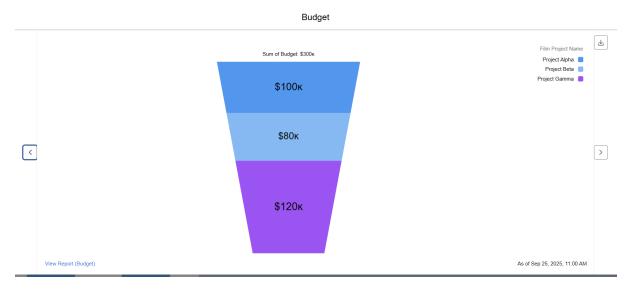


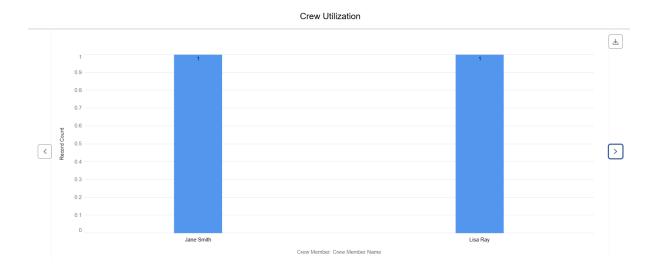


2. Dashboards:

- Visual summary of production status.
- Components include:
 - Upcoming Shoots by Actor
 - o Budget
 - o Crew Utilization

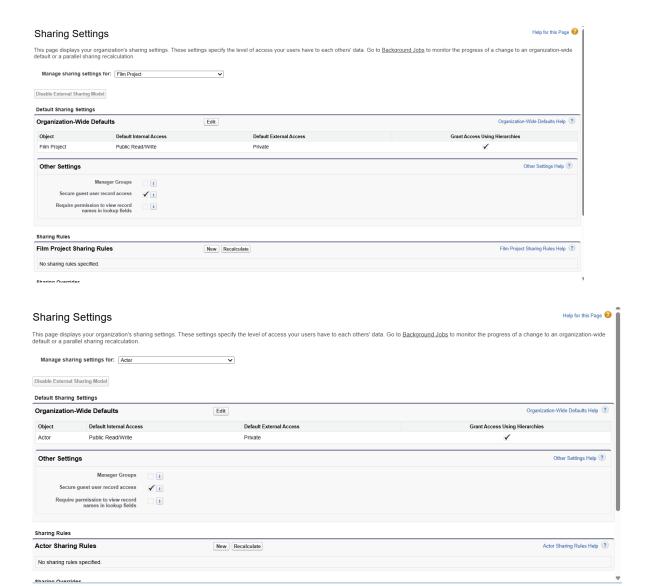






3. Profiles & Permission Sets:

- Define CRUD access for different users:
 - Actors: Read-only or limited access
 - o Crew: Read/Write on assigned objects



4. Organization-Wide Defaults (OWD) & Sharing Rules:

- Control record visibility across the org.
- Example: Actors can only see their own assignments; Producers see all shoots.



Phase 10: Quality Assurance Testing:

Purpose:

To verify that all business logic, automation, and data integrity in the Trendy Kings Film CRM are functioning correctly, ensuring smooth operations for users without errors.

Testing Scope:

Validation Rules:

o Ensure that actors marked as "Not Available" cannot be assigned to shoots.

• Flows:

Automatically update shoot status to "Completed" when the End Date has passed.

• Apex Triggers:

- o Ensure fields like Actor Email c are auto-populated upon assignment.
- o Send notification emails to assigned actors and crew.

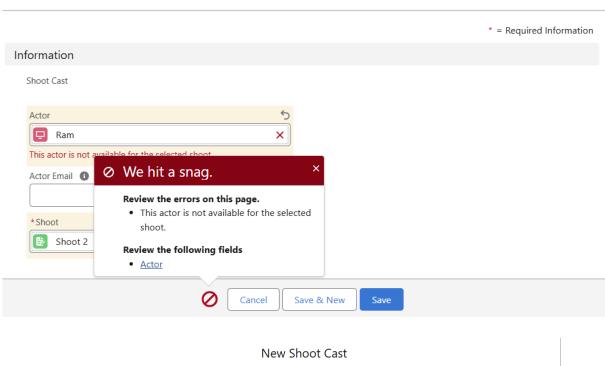
Reports and Dashboards:

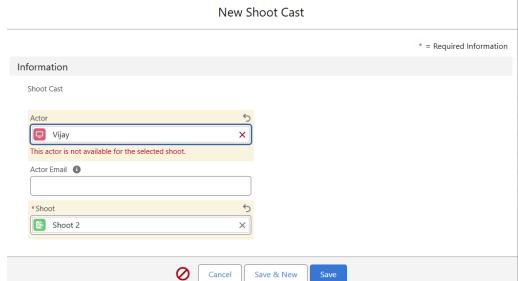
- Verify data accuracy in reports (e.g., scheduled shoots, actor assignments).
- Ensure dashboards correctly visualize production progress and actor availability.

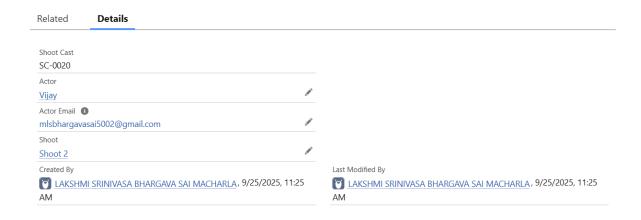
• User Permissions and Access:

 Confirm that users can only access objects, fields, and records according to their profiles and permission sets.

New Shoot Cast







Conclusion & Future Enhancements:

The Trendy Kings Film CRM project successfully implemented a centralized system to manage actors, shoots, crew, and locations. Key achievements include:

- Streamlined actor management and casting tracking.
- Automated **shoot scheduling** and status updates.
- Improved **communication** between production crew through automated notifications.
- Accurate **reporting and dashboards** for production monitoring.
- Proper enforcement of **data integrity** via validation rules, flows, and Apex triggers.

This CRM ensures efficient production planning, reduces errors, and enhances team collaboration, providing tangible business value to Trendy Kings Film.

Future Enhancements:

1. AI-based Actor Scheduling:

o Suggest actors based on availability, roles, and past shoot performance.

2. Chatbot Integration:

 Provide instant updates to actors and crew via Salesforce Chat or Slack integration.

3. Advanced Reporting & Analytics:

 Predictive analytics on shoot timelines, actor engagement, and budget utilization.

4. Mobile Optimization:

 Enhance Lightning pages and LWC components for mobile devices to allow on-set access.

5. External Integrations:

o Integrate with payment gateways, casting platforms, or third-party production tools for a fully connected ecosystem.