Phase 10: Final Presentation & Demo Day

Objective:

- Present the completed Salesforce project to stakeholders or evaluators.

- Demonstrate key features: objects, automation, flows, reports, dashboards.

- Highlight business impact, user experience, and data insights.

- Ensure everything is working correctly for live demonstration.

Step 1: Prepare the Presentation

Include sections:

- Project Overview: Purpose, objectives, scope.

- Phase-wise Implementation: Brief highlights from Phase 1–9.

- Key Features: Automation, record-triggered flows, Lightning pages.

- Reports & Dashboards: Show charts and insights.

- Data Management: Sample data upload and validation.

- Security & Access Control: Profiles, sharing rules, validation.

- Business Impact: How the project benefits stakeholders or users.

Step 2: Demo Environment Setup

1. Open Salesforce sandbox or Developer Org.

2. Ensure sample data is loaded and flows are active.

3. Prepare:

   o Customer and Purchase objects with sample data.

   o Flows & automation ready to trigger.

   o Reports & dashboards visible and interactive.

Step 3: Demo Flow

1. **Login & Navigation**

   o Show how users access Salesforce and navigate the app.

2. **Show Key Features**

   o Create a new Customer record → show flows updating Tier.

- o Create a Purchase record → show automation updating Total Amount or sending notifications.

- o Navigate Lightning Pages → show buttons, components, and layouts.

3. **Reports & Dashboards**

- o Open Customer Sales Summary Report → Bar chart grouped by Tier.

- o Open Gold Tier Customer Report → Pie chart.

- o Open Purchase Summary Report → Table with all purchases.

4. **Security Review**

- o Show Login as User → demonstrate restricted access where applicable.

Step 4: Key Highlights to Discuss

- Automation: How flows reduce manual work.

- Reports & Dashboards: How charts and tables provide actionable insights.

- Data Management: Easy import, validation, and updates.

- Security: Profiles controlling access; sensitive data protected.

- User Experience: Intuitive Lightning pages and navigation.

- Scalability: Can handle additional customers, purchases, and reports in future.

Step 5: Outcome

- Stakeholders can see the full working project in Salesforce.

- Demonstrates Admin + Developer skills in real scenarios.

- Shows business insights, usability, and automation.

- Marks the successful completion of the project, ready for handover or submission.