Mini Project 1
Ebay sales and service project

Introduction:

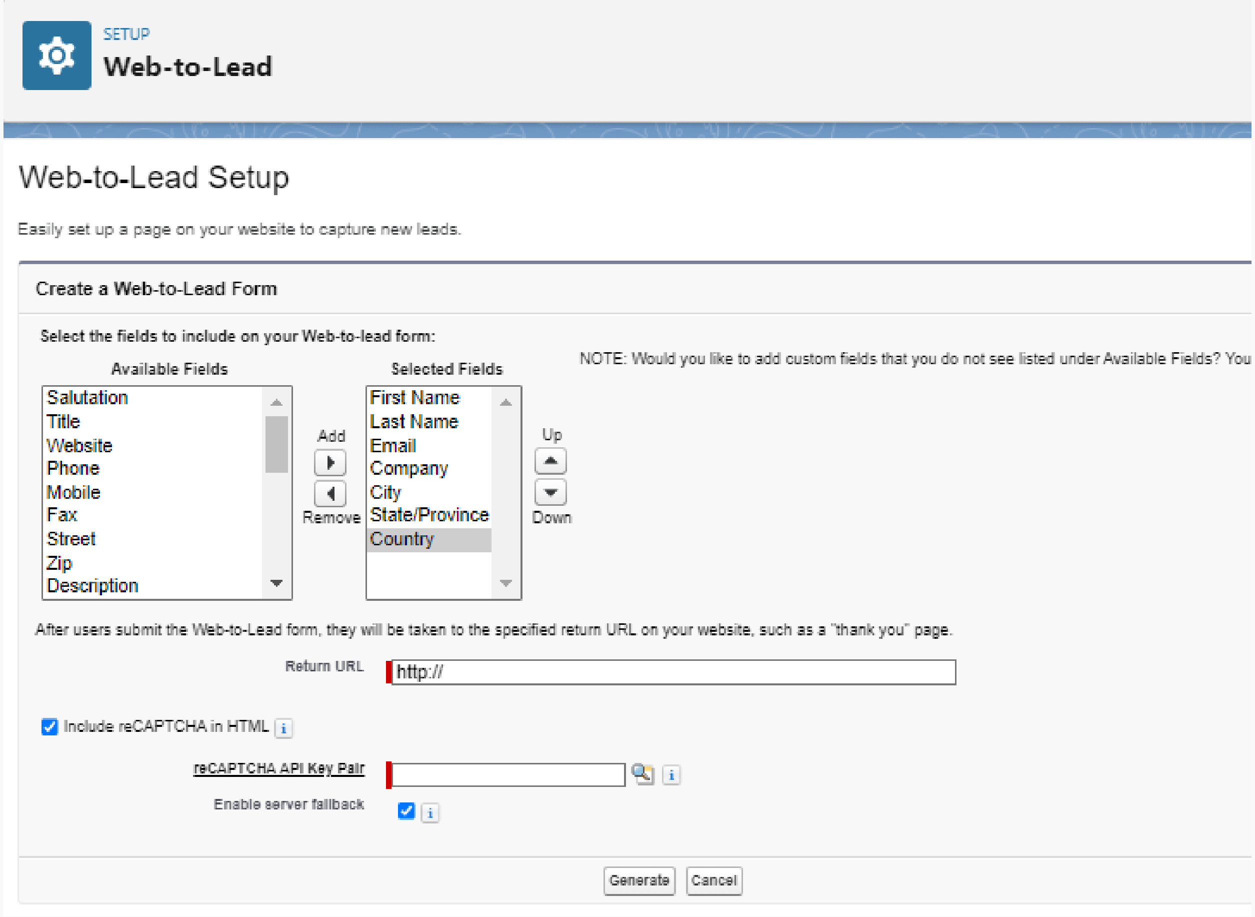
1. The first project is for eBay Sales and Service Company which was implemented for the company to grow its business
2. Company wanted to incorporate a lead management system. The main purpose was to ensure that potential leads are to be given good and quick service to ultimately increase sales.

Implantations:

Part 1:

Step 1:

Web-To-Lead: configured Web-To-Lead forms to capture lead information directly from the company's website. This allowed the company to quickly capture potential customer information and respond to inquiries in a timely manner.



SETUP

Web-to-Lead

Web-to-Lead Setup

Easily set up a page on your website to capture new leads.

Create a Web-to-Lead Form

Select the fields to include on your Web-to-lead form:

Available Fields	Selected Fields
Salutation	First Name
Title	Last Name
Website	Email
Phone	Company
Mobile	City
Fax	State/Province
Street	Country
Zip	
Description	

NOTE: Would you like to add custom fields that you do not see listed under Available Fields? You

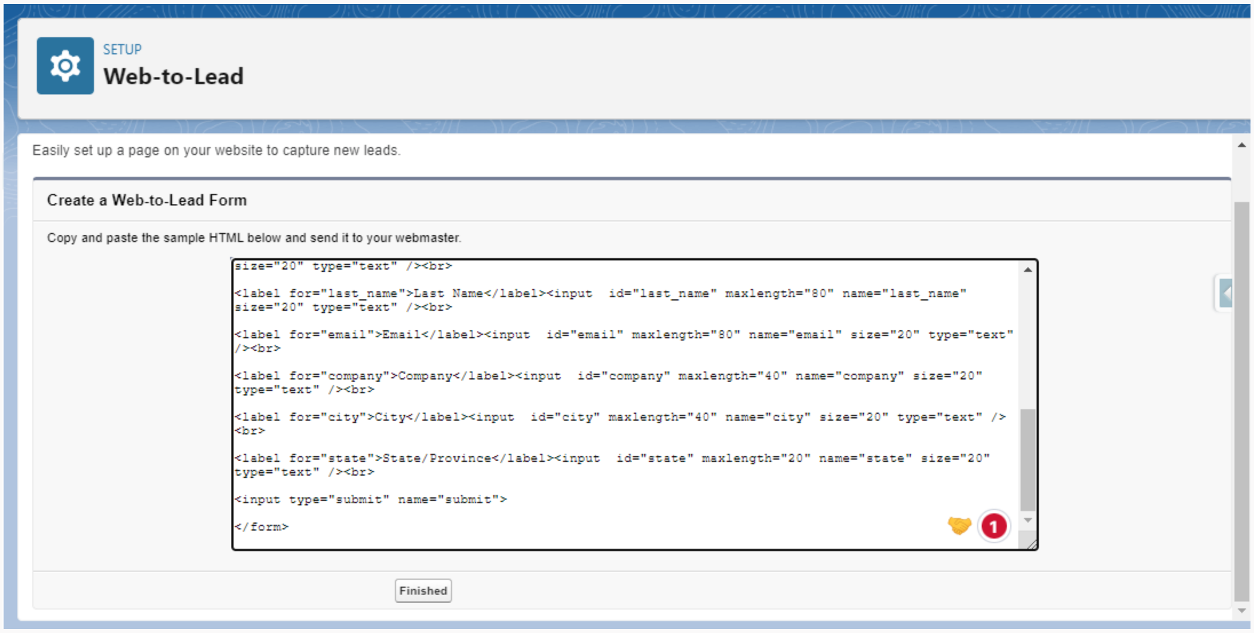
After users submit the Web-to-Lead form, they will be taken to the specified return URL on your website, such as a "thank you" page.

Return URL: http://

☑ Include reCAPTCHA in HTML

reCAPTCHA API Key Pair:

Enable server fallback ☑



Easily set up a page on your website to capture new leads.

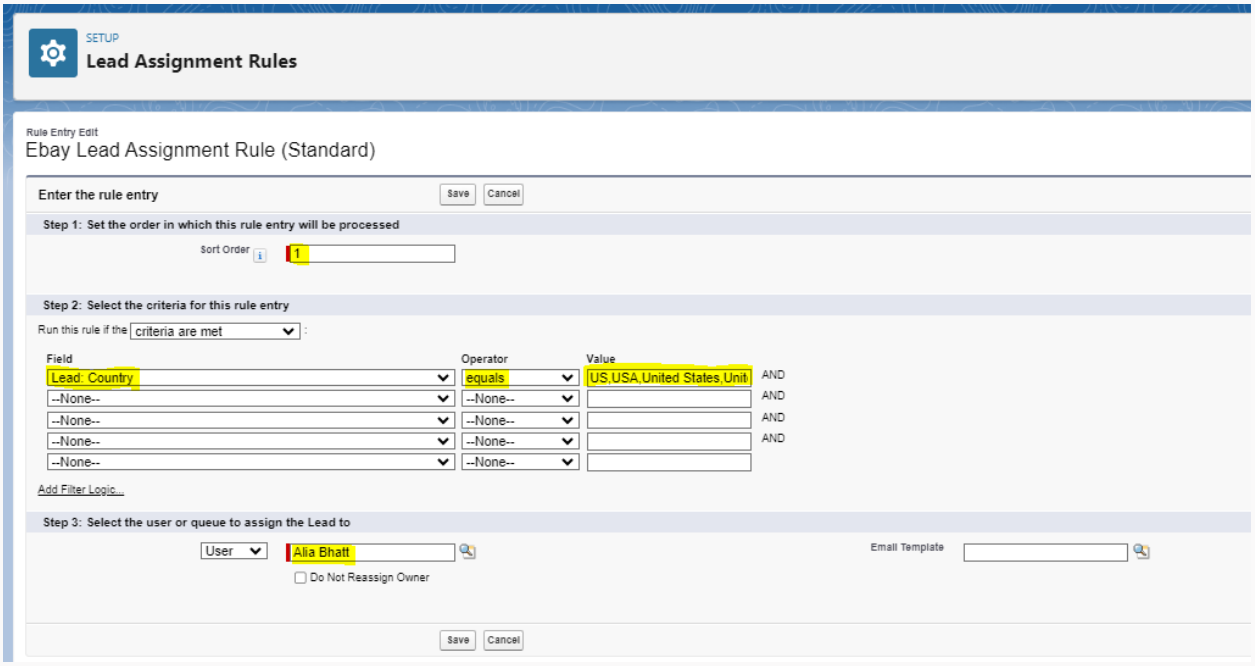
Create a Web-to-Lead Form

Copy and paste the sample HTML below and send it to your webmaster.

```
size="20" type="text" /><br>

<label for="last_name">Last Name</label><input  id="last_name" maxlength="80" name="last_name"
size="20" type="text" /><br>

<label for="email">Email</label><input  id="email" maxlength="80" name="email" size="20" type="text"
/><br>

<label for="company">Company</label><input  id="company" maxlength="40" name="company" size="20"
type="text" /><br>

<label for="city">City</label><input  id="city" maxlength="40" name="city" size="20" type="text" />
<br>

<label for="state">State/Province</label><input  id="state" maxlength="20" name="state" size="20"
type="text" /><br>

<input type="submit" name="submit">

</form>
```

Step 2:

User Management: managed user permissions and roles to ensure that the right people had access to the right data and features. This helped to improve data security and reduce the risk of unauthorized access. Lead Assignment Rule: created a lead assignment rule that automatically assigned new leads to the appropriate sales representative based on criteria such as geographic location and product interest. This helped to ensure that leads were quickly followed up on and increased the efficiency of the sales process. If leads come from USA region then we need to send ownership to Alia.



Rule Entry Edit

Ebay Lead Assignment Rule (Standard)

Enter the rule entry

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

Sort Order: 1

Step 2: Select the criteria for this rule entry

Run this rule if the criteria are met :

Field	Operator	Value	
Lead: Country	equals	US,USA,United States,Unit	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

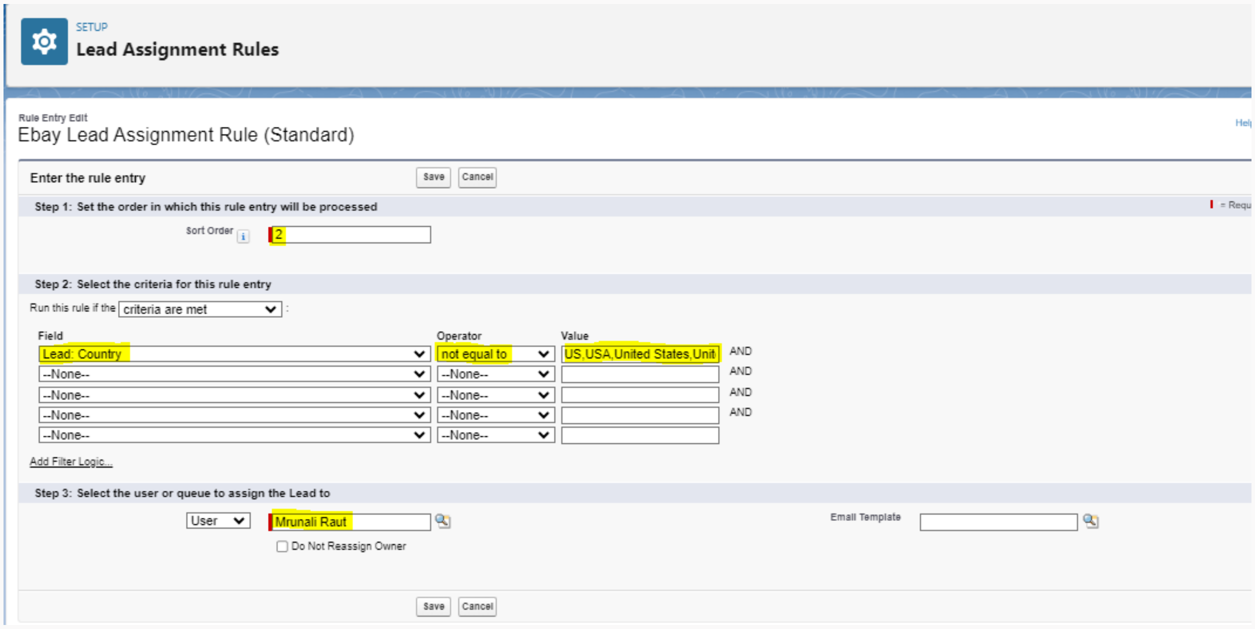
Step 3: Select the user or queue to assign the Lead to

User Alia Bhatt

☐ Do Not Reassign Owner

Email Template:

Leads having country other than USA, assign them to Mrunali user.



SETUP

Lead Assignment Rules

Rule Entry Edit

Ebay Lead Assignment Rule (Standard)

Enter the rule entry

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

Sort Order
2

Step 2: Select the criteria for this rule entry

Run this rule if the criteria are met:

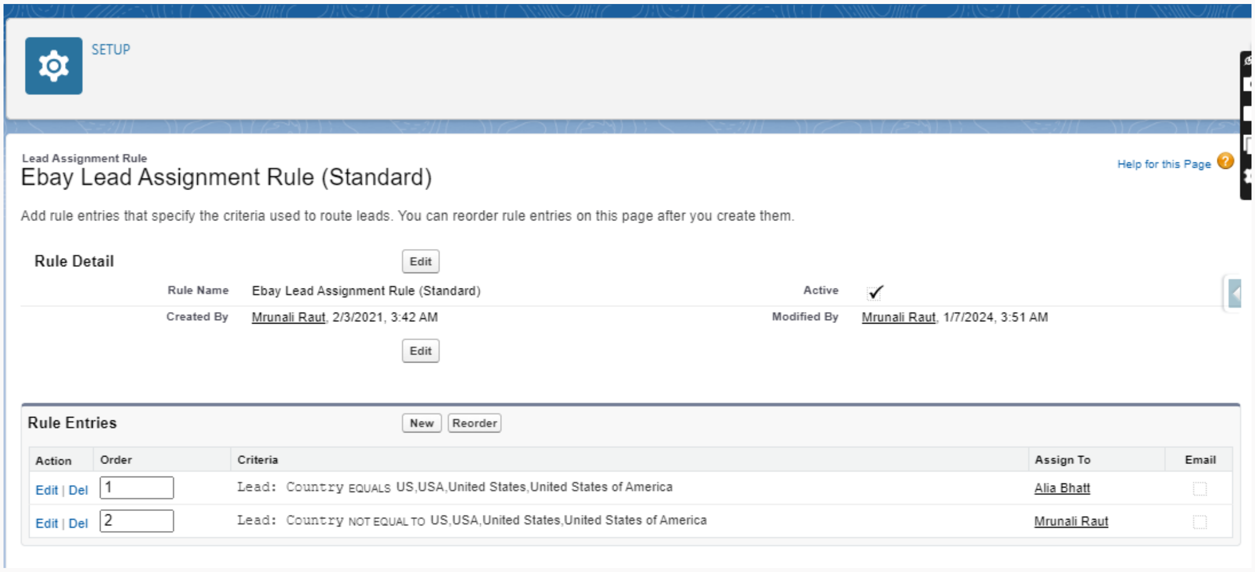
Field	Operator	Value	
Lead: Country	not equal to	US,USA,United States,Unit	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

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

User
Mrunali Raut

☐ Do Not Reassign Owner

Email Template



SETUP

Lead Assignment Rule

Ebay Lead Assignment Rule (Standard)

Add rule entries that specify the criteria used to route leads. You can reorder rule entries on this page after you create them.

Rule Detail

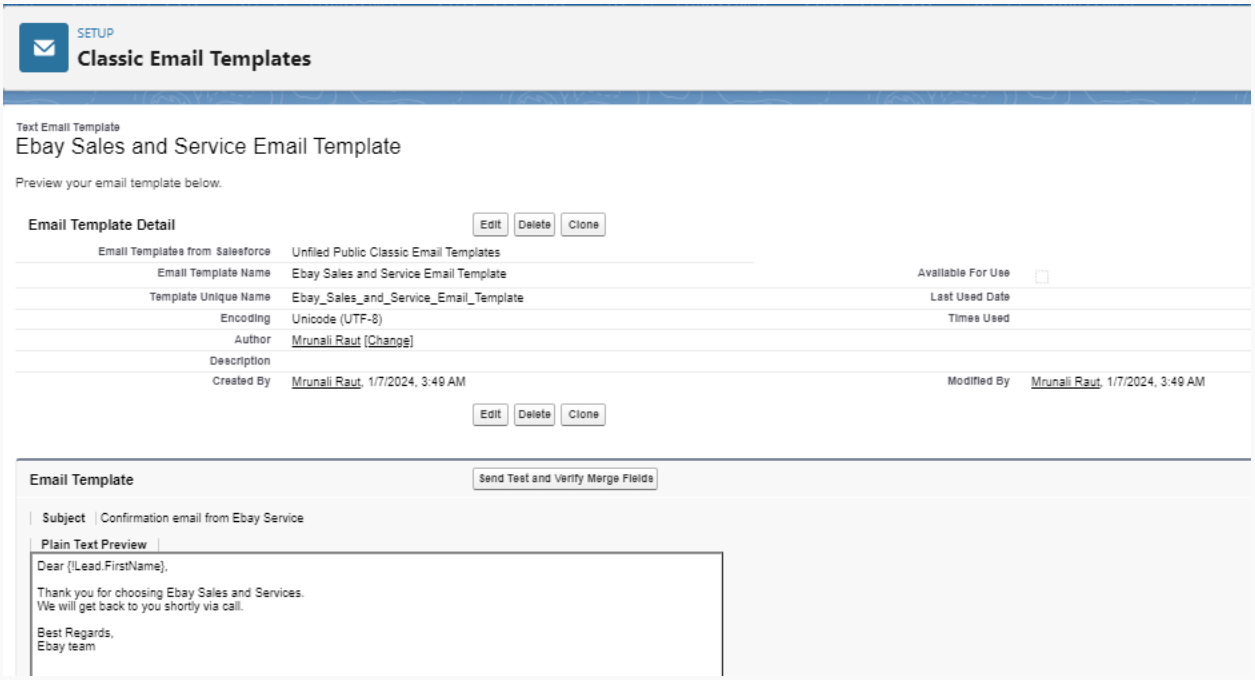
Rule Name	Ebay Lead Assignment Rule (Standard)	Active	✓
Created By	Mrunali Raut, 2/3/2021, 3:42 AM	Modified By	Mrunali Raut, 1/7/2024, 3:51 AM

Rule Entries

Action	Order	Criteria	Assign To	Email
Edit | Del	1	Lead: Country EQUALS US,USA,United States,United States of America	Alia Bhatt	☐
Edit | Del	2	Lead: Country NOT EQUAL TO US,USA,United States,United States of America	Mrunali Raut	☐

Step 3:

Designed and developed custom email templates that were responsive and optimized for different devices. This helped to improve the effectiveness of email communications with customers and prospects.



SETUP

Classic Email Templates

Text Email Template

Ebay Sales and Service Email Template

Preview your email template below.

Email Template Detail

Email Templates from Salesforce	Unfiled Public Classic Email Templates		
Email Template Name	Ebay Sales and Service Email Template	Available For Use	☐
Template Unique Name	Ebay_Sales_and_Service_Email_Template	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Mrunali Raut [Change]		
Description			
Created By	Mrunali Raut, 1/7/2024, 3:49 AM	Modified By	Mrunali Raut, 1/7/2024, 3:49 AM

Email Template

Subject: Confirmation email from Ebay Service

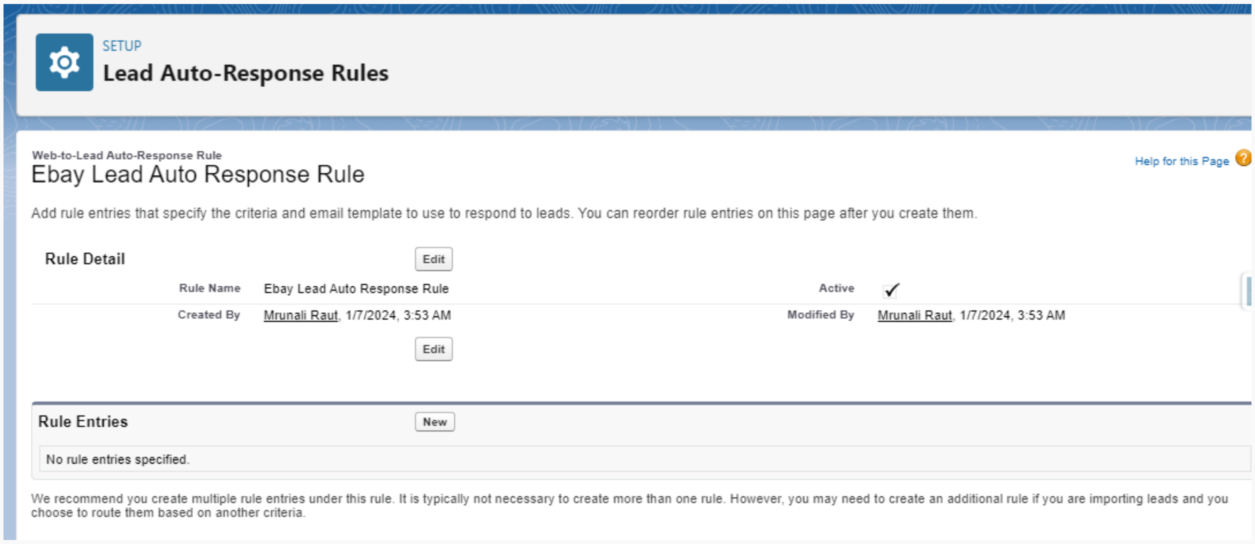
Plain Text Preview

Dear {!Lead.FirstName},

Thank you for choosing Ebay Sales and Services.
We will get back to you shortly via call.

Best Regards,
Ebay team

Lead Auto Response Rule: As soon as lead record makes entry into Salesforce system, we need to send them automated male about confirmation, that they will be getting a call soon.



SETUP

Lead Auto-Response Rules

Web-to-Lead Auto-Response Rule

Ebay Lead Auto Response Rule

Add rule entries that specify the criteria and email template to use to respond to leads. You can reorder rule entries on this page after you create them.

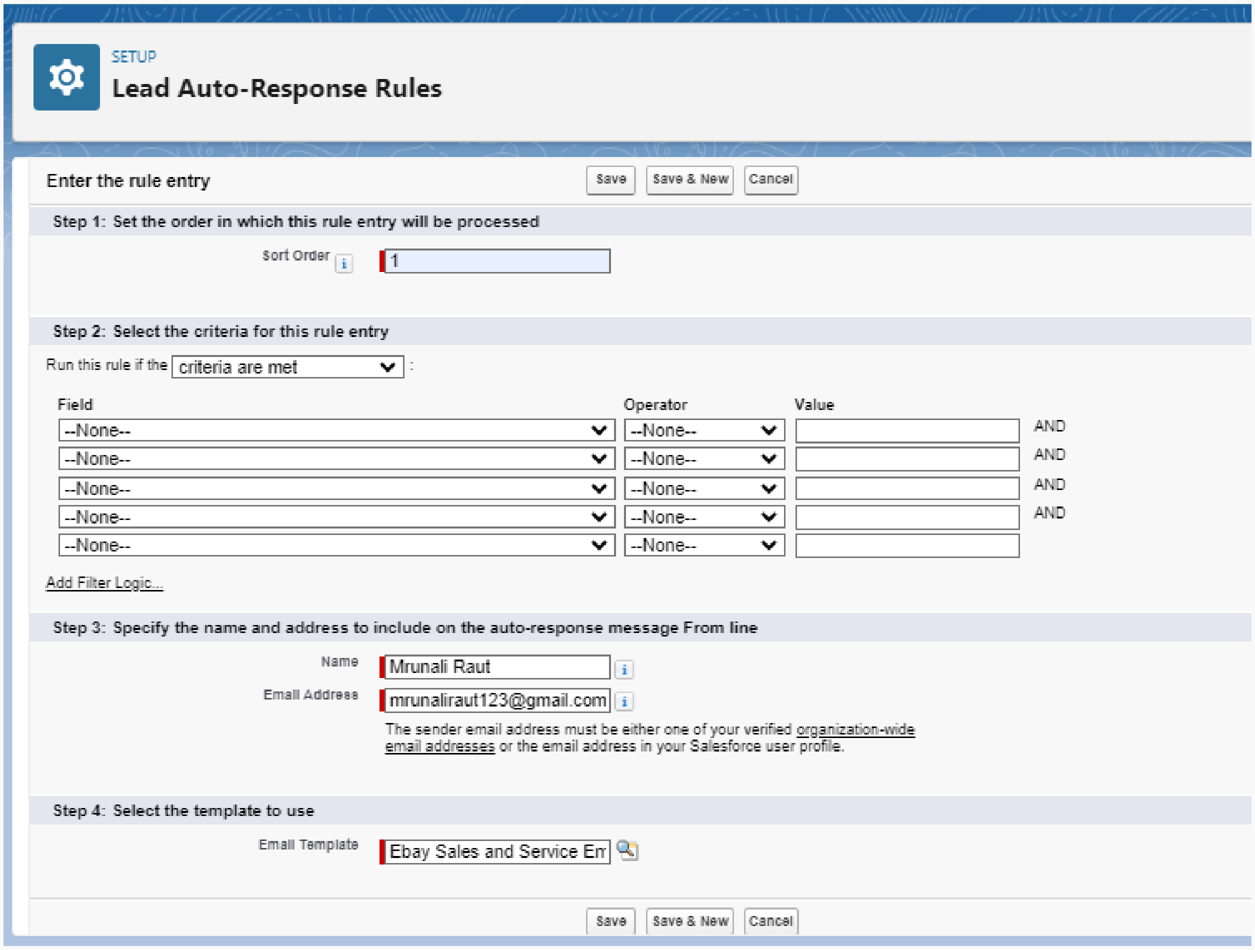
Rule Detail

Rule Name	Ebay Lead Auto Response Rule	Active	✓
Created By	Mrunali Raut, 1/7/2024, 3:53 AM	Modified By	Mrunali Raut, 1/7/2024, 3:53 AM

Rule Entries

No rule entries specified.

We recommend you create multiple rule entries under this rule. It is typically not necessary to create more than one rule. However, you may need to create an additional rule if you are importing leads and you choose to route them based on another criteria.



Lead Auto-Response Rules

Enter the rule entry

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

Sort Order: 1

Step 2: Select the criteria for this rule entry

Run this rule if the criteria are met :

Field	Operator	Value
--None--	--None--	
--None--	--None--	
--None--	--None--	
--None--	--None--	
--None--	--None--	

Step 3: Specify the name and address to include on the auto-response message From line

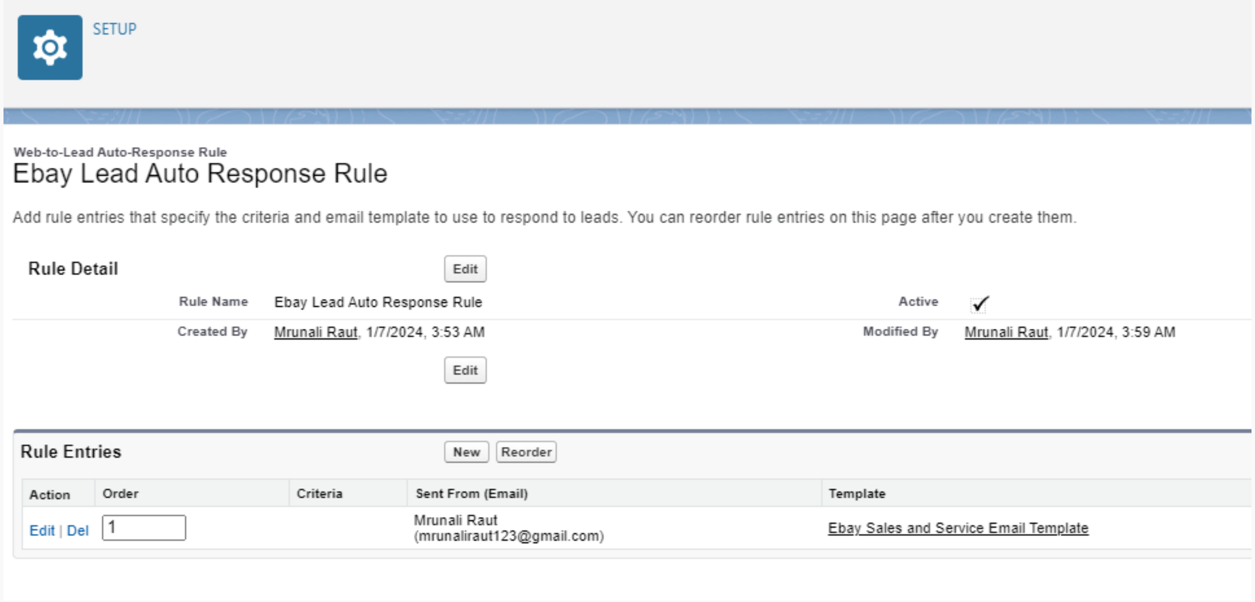
Name: Mrunali Raut

Email Address: mrunaliraut123@gmail.com

The sender email address must be either one of your verified organization-wide email addresses or the email address in your Salesforce user profile.

Step 4: Select the template to use

Email Template: Ebay Sales and Service Em



Web-to-Lead Auto-Response Rule

Ebay Lead Auto Response Rule

Add rule entries that specify the criteria and email template to use to respond to leads. You can reorder rule entries on this page after you create them.

Rule Detail

Rule Name: Ebay Lead Auto Response Rule

Active: ✓

Created By: Mrunali Raut, 1/7/2024, 3:53 AM

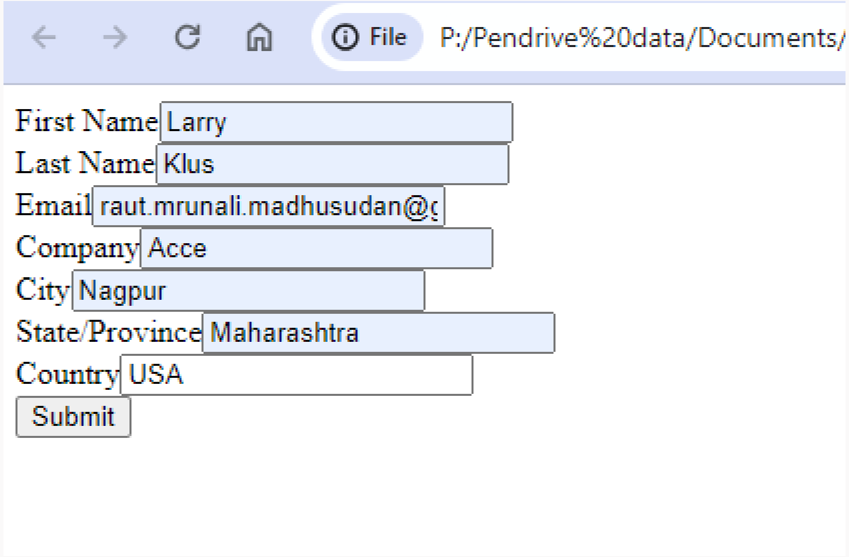
Modified By: Mrunali Raut, 1/7/2024, 3:59 AM

Rule Entries

Action	Order	Criteria	Sent From (Email)	Template
Edit | Del	1		Mrunali Raut (mrunaliraut123@gmail.com)	Ebay Sales and Service Email Template

Testing:

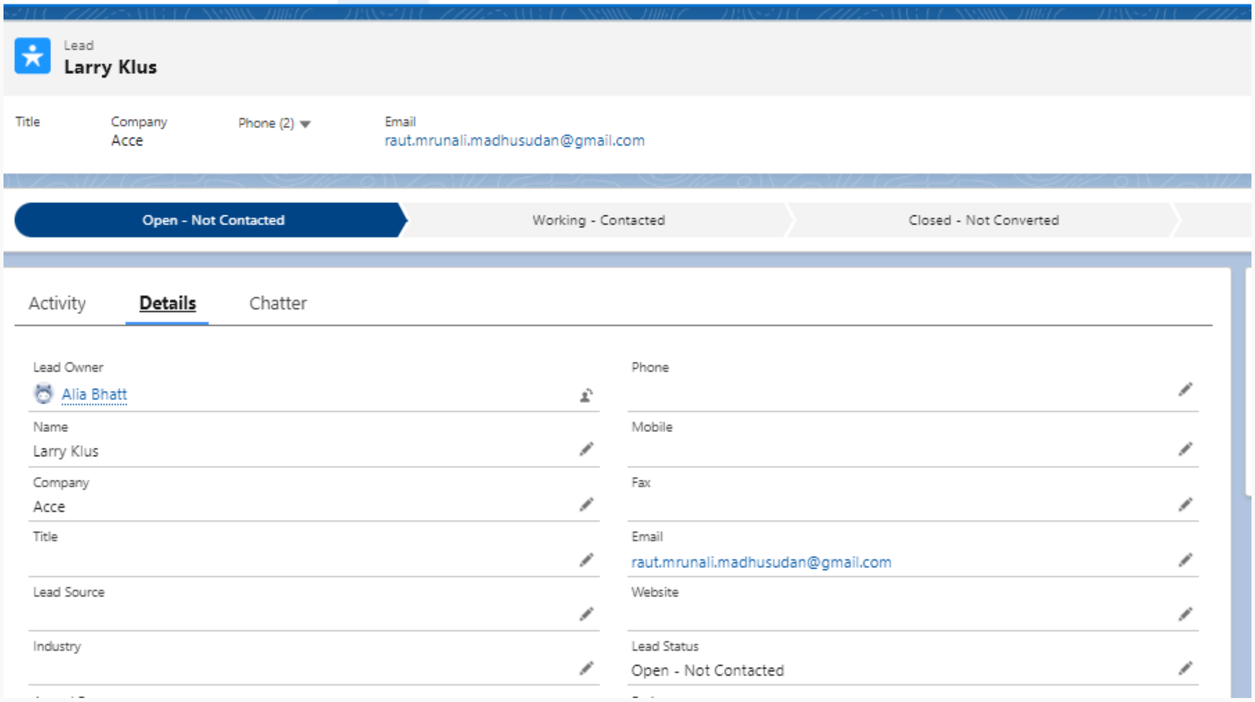
Creating a Lead record from web.


File
P:/Pendrive%20data/Documents/

First Name Larry
Last Name Klus
Email raut.mrunali.madhusudan@
Company Acce
City Nagpur
State/Province Maharashtra
Country USA

Submit

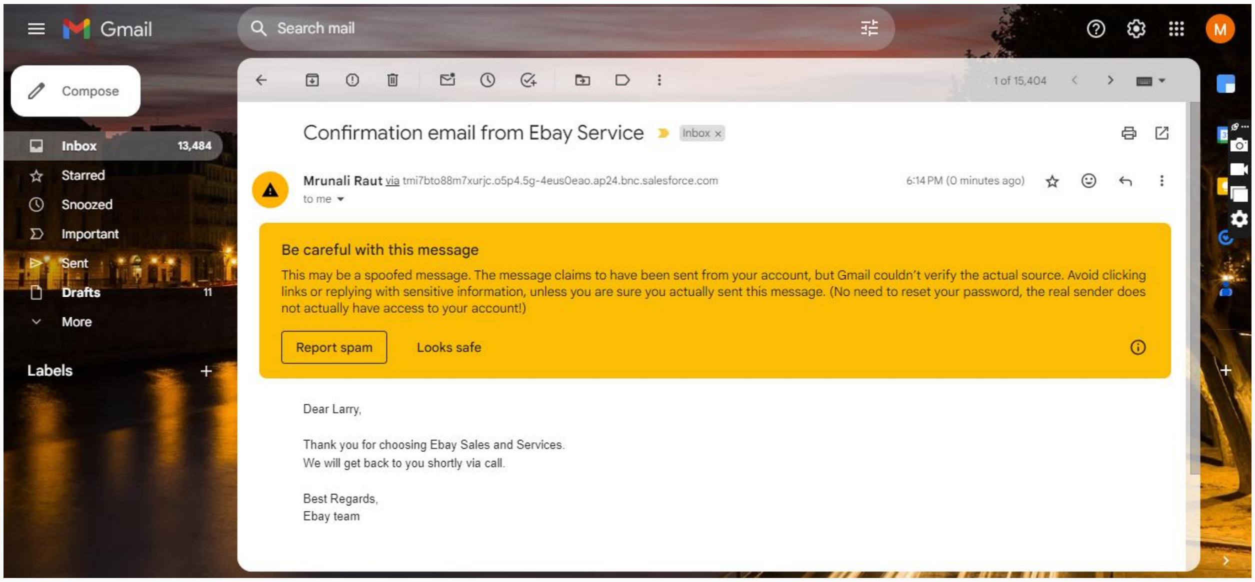
Lead record coming from USA is created into Salesforce and ownership is given to Alia.


Lead
Larry Klus
Open - Not Contacted
Working - Contacted
Closed - Not Converted
Activity
Details
Chatter

Title
Company: Acce
Phone (2)
Email: raut.mrunali.madhusudan@gmail.com

Lead Owner Alia Bhatt	Phone
Name Larry Klus	Mobile
Company Acce	Fax
Title	Email raut.mrunali.madhusudan@gmail.com
Lead Source	Website
Industry	Lead Status Open - Not Contacted

Email is also received:



Confirmation email from Ebay Service

Mrunali Raut via tmi7bto88m7xurjc.o5p4.5g-4eus0eao.ap24.bnc.salesforce.com
to me
6:14 PM (0 minutes ago)

Be careful with this message

This may be a spoofed message. The message claims to have been sent from your account, but Gmail couldn't verify the actual source. Avoid clicking links or replying with sensitive information, unless you are sure you actually sent this message. (No need to reset your password, the real sender does not actually have access to your account!)

Dear Larry,

Thank you for choosing Ebay Sales and Services.
We will get back to you shortly via call.

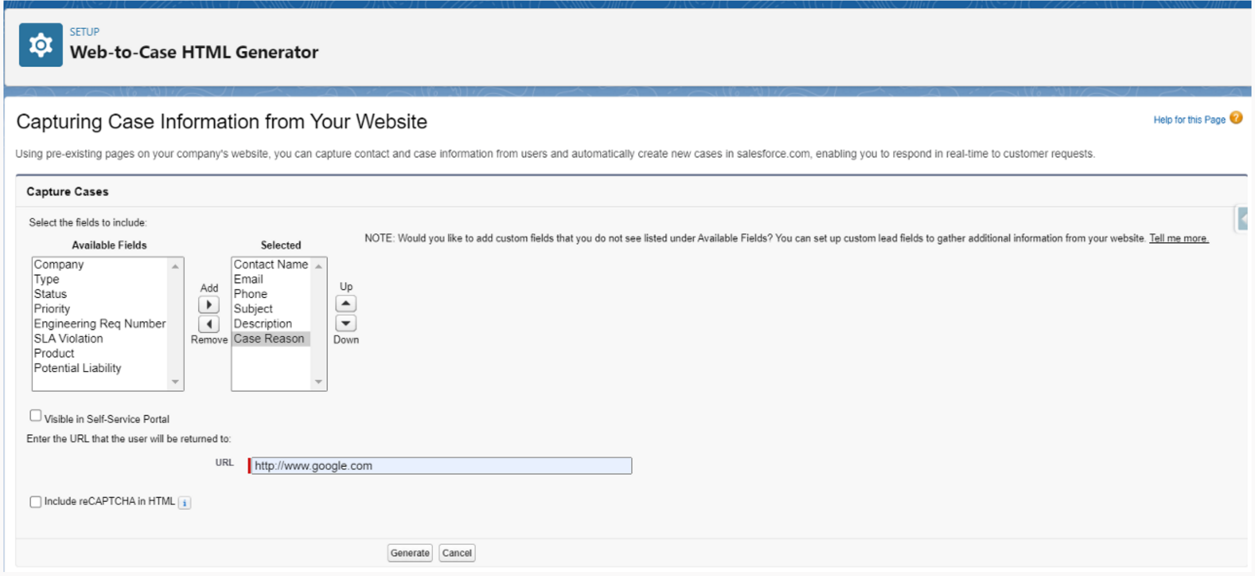
Best Regards,
Ebay team

Part 2:

The same company has not been able to resolve a lot of customer complaints on time. Also, they failed to map the right complaint to right person.

For this, we have proposed Service cloud implementation to them to meet the expectations of customer, and enhancing the customer service process.

Web-To-Case: Configured Web-To-Case forms to allow customers to submit support requests directly from the company's website.



Web-to-Case HTML Generator

Capturing Case Information from Your Website

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

Capture Cases

Select the fields to include:

NOTE: Would you like to add custom fields that you do not see listed under Available Fields? You can set up custom lead fields to gather additional information from your website. Tell me more.

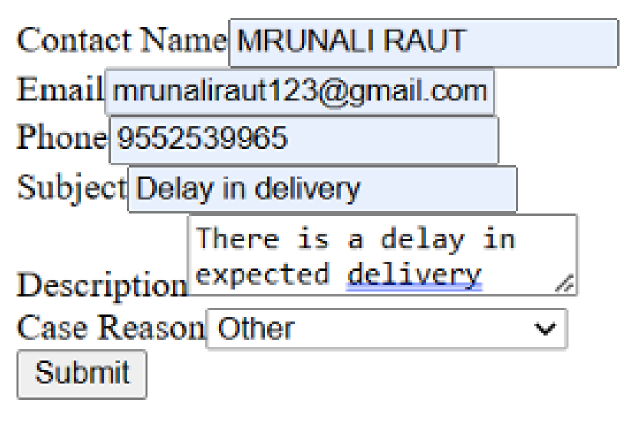
Available Fields	Selected
Company	Contact Name
Type	Email
Status	Phone
Priority	Subject
Engineering Req Number	Description
SLA Violation	Case Reason
Product	
Potential Liability	

☐ Visible in Self-Service Portal

Enter the URL that the user will be returned to:

URL http://www.google.com

☐ Include reCAPTCHA in HTML



Contact Name MRUNALI RAUT

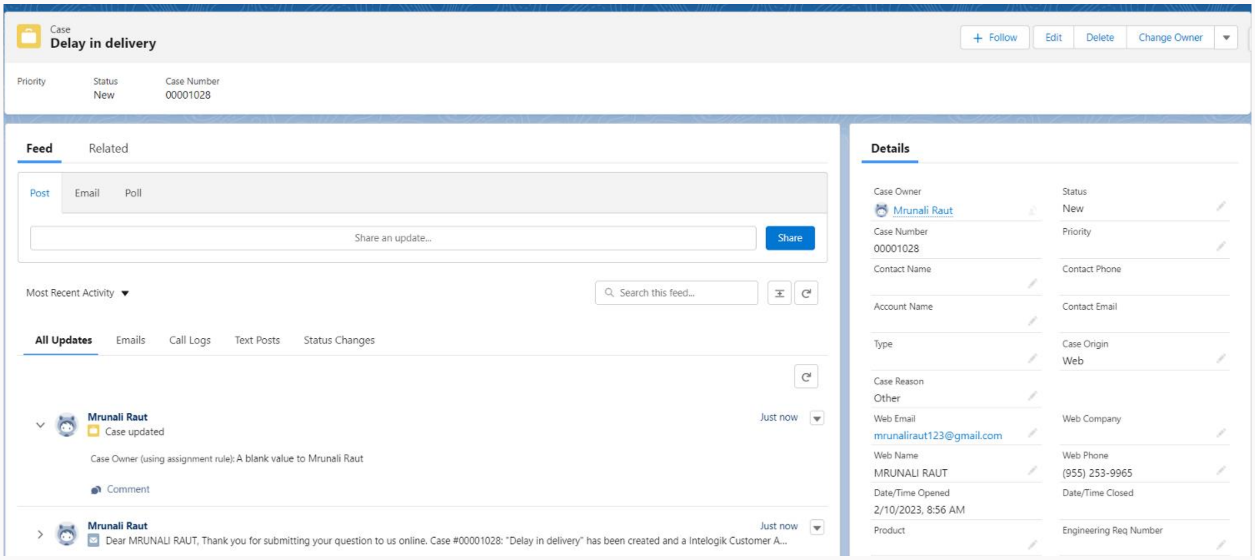
Email mrunaliraut123@gmail.com

Phone 9552539965

Subject Delay in delivery

Description There is a delay in expected delivery

Case Reason Other



Case

Delay in delivery

Priority

Status New

Case Number 00001028

+ Follow
Edit
Delete
Change Owner
Feed
Related
Post
Email
Poll
Share an update...
Share
Most Recent Activity
Search this feed...
All Updates
Emails
Call Logs
Text Posts
Status Changes
Comment
Details

Mrunali Raut — Just now

Case updated

Case Owner (using assignment rule): A blank value to Mrunali Raut

Mrunali Raut — Just now

Dear MRUNALI RAUT, Thank you for submitting your question to us online. Case #00001028: "Delay in delivery" has been created and a Intelogik Customer A...

Case Owner: Mrunali Raut

Status: New

Case Number: 00001028

Priority:

Contact Name:

Contact Phone:

Account Name:

Contact Email:

Type:

Case Origin: Web

Case Reason: Other

Web Email: mrunaliraut123@gmail.com

Web Company:

Web Name: MRUNALI RAUT

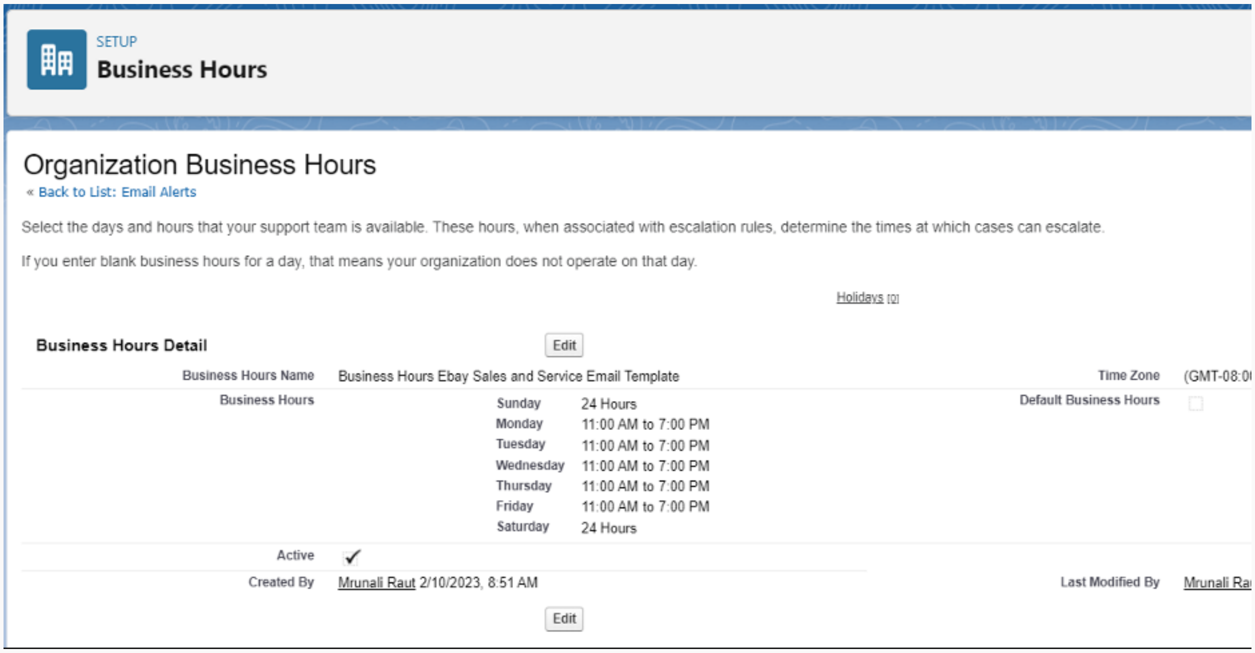
Web Phone: (955) 253-9965

Date/Time Opened: 2/10/2023, 8:56 AM

Date/Time Closed:

Product:

Engineering Req Number:



Organization Business Hours

« Back to List: Email Alerts

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays [0]

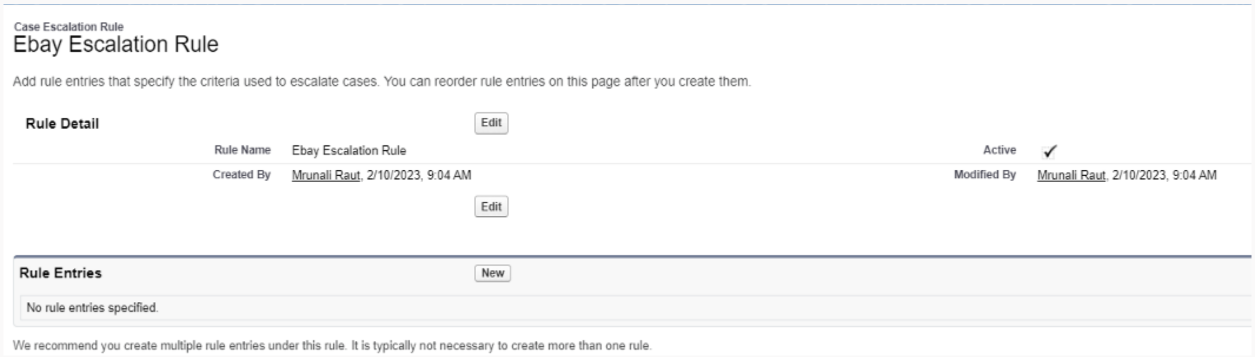
Business Hours Detail

Business Hours Name: Business Hours Ebay Sales and Service Email Template
Time Zone: (GMT-08:0
Default Business Hours: ☐

Business Hours	
Sunday	24 Hours
Monday	11:00 AM to 7:00 PM
Tuesday	11:00 AM to 7:00 PM
Wednesday	11:00 AM to 7:00 PM
Thursday	11:00 AM to 7:00 PM
Friday	11:00 AM to 7:00 PM
Saturday	24 Hours

Active: ✓
Created By: Mrunali Raut 2/10/2023, 8:51 AM
Last Modified By: Mrunali Ra

Escalation Rules: Created escalation rules that automatically escalated support cases to the appropriate support representative based on criteria such as case priority and age.



Case Escalation Rule

Ebay Escalation Rule

Add rule entries that specify the criteria used to escalate cases. You can reorder rule entries on this page after you create them.

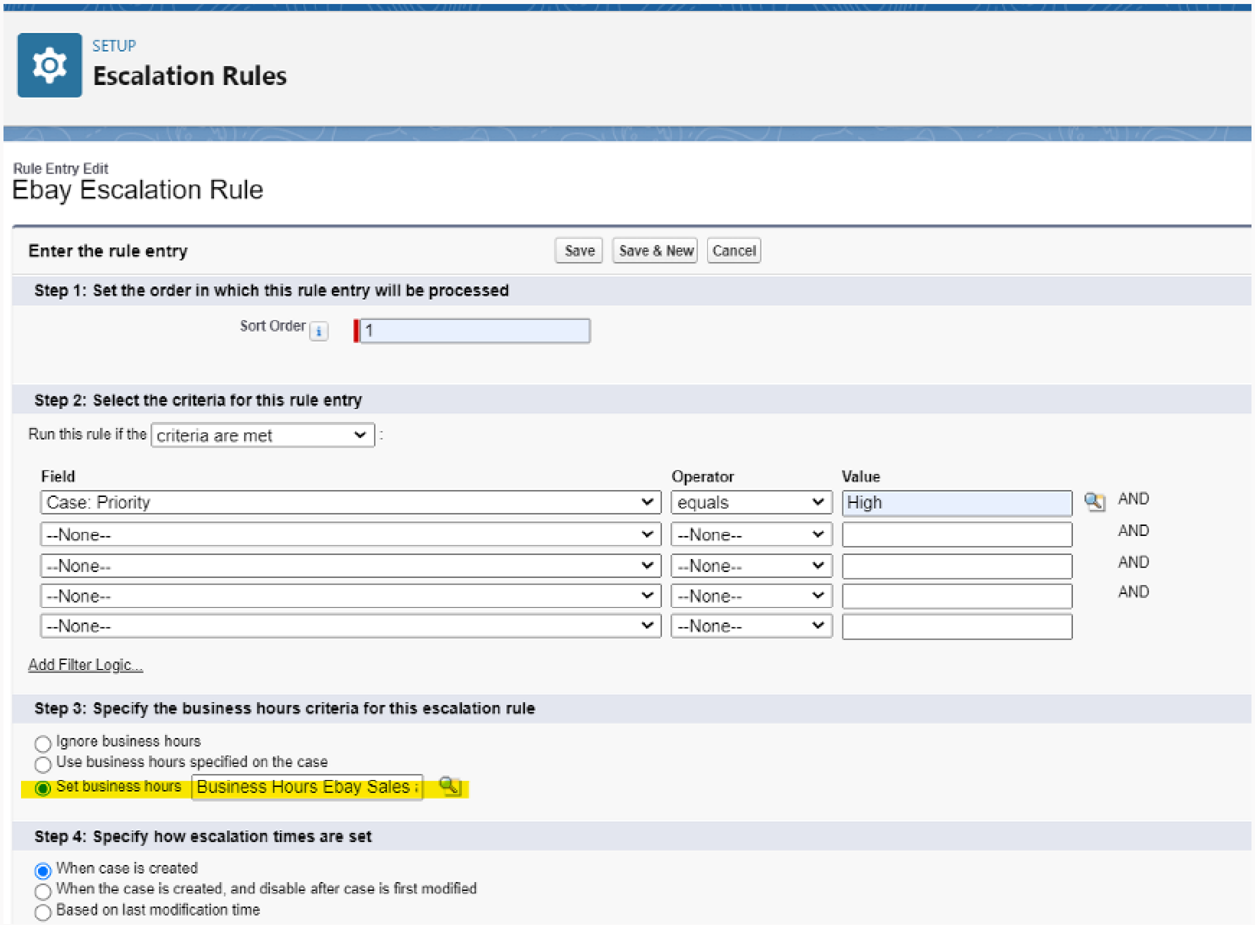
Rule Detail

Rule Name: Ebay Escalation Rule
Active: ✓
Created By: Mrunali Raut, 2/10/2023, 9:04 AM
Modified By: Mrunali Raut, 2/10/2023, 9:04 AM

Rule Entries

No rule entries specified.

We recommend you create multiple rule entries under this rule. It is typically not necessary to create more than one rule.



SETUP

Escalation Rules

Rule Entry Edit

Ebay Escalation Rule

Enter the rule entry

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

Sort Order: 1

Step 2: Select the criteria for this rule entry

Run this rule if the criteria are met :

Field	Operator	Value	
Case: Priority	equals	High	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

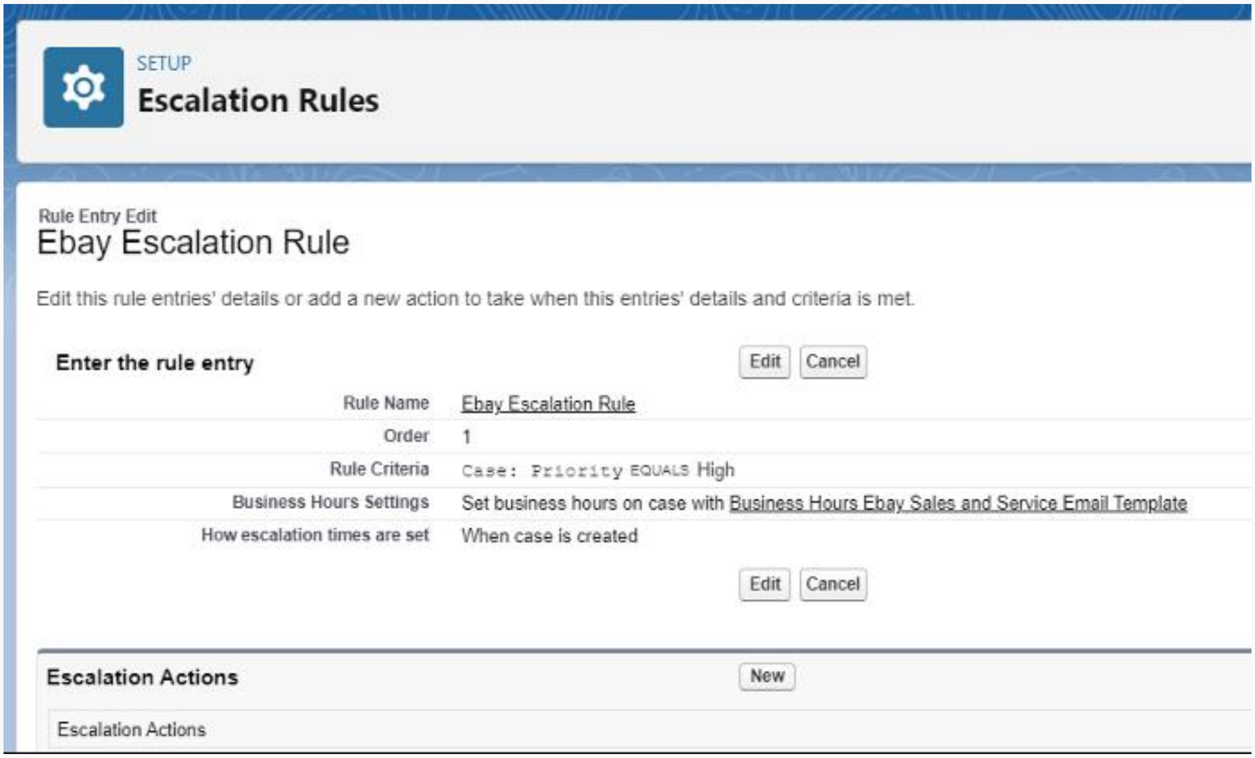
Add Filter Logic...

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

○ Ignore business hours
○ Use business hours specified on the case
● Set business hours Business Hours Ebay Sales

Step 4: Specify how escalation times are set

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



SETUP

Escalation Rules

Rule Entry Edit

Ebay Escalation Rule

Edit this rule entries' details or add a new action to take when this entries' details and criteria is met.

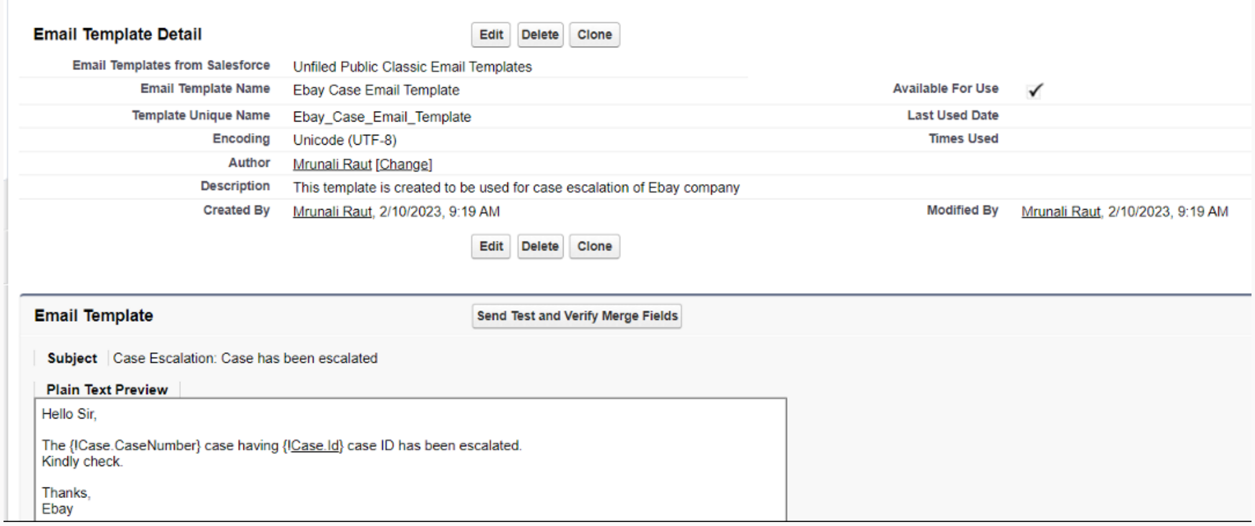
Enter the rule entry

Rule Name	Ebay Escalation Rule
Order	1
Rule Criteria	Case: Priority EQUALS High
Business Hours Settings	Set business hours on case with Business Hours Ebay Sales and Service Email Template
How escalation times are set	When case is created

Escalation Actions

Escalation Actions

Email template is created:



Email Template Detail

Email Templates from Salesforce	Unfiled Public Classic Email Templates		
Email Template Name	Ebay Case Email Template	Available For Use	✓
Template Unique Name	Ebay_Case_Email_Template	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Mrunali Raut [Change]		
Description	This template is created to be used for case escalation of Ebay company		
Created By	Mrunali Raut, 2/10/2023, 9:19 AM	Modified By	Mrunali Raut, 2/10/2023, 9:19 AM

Email Template

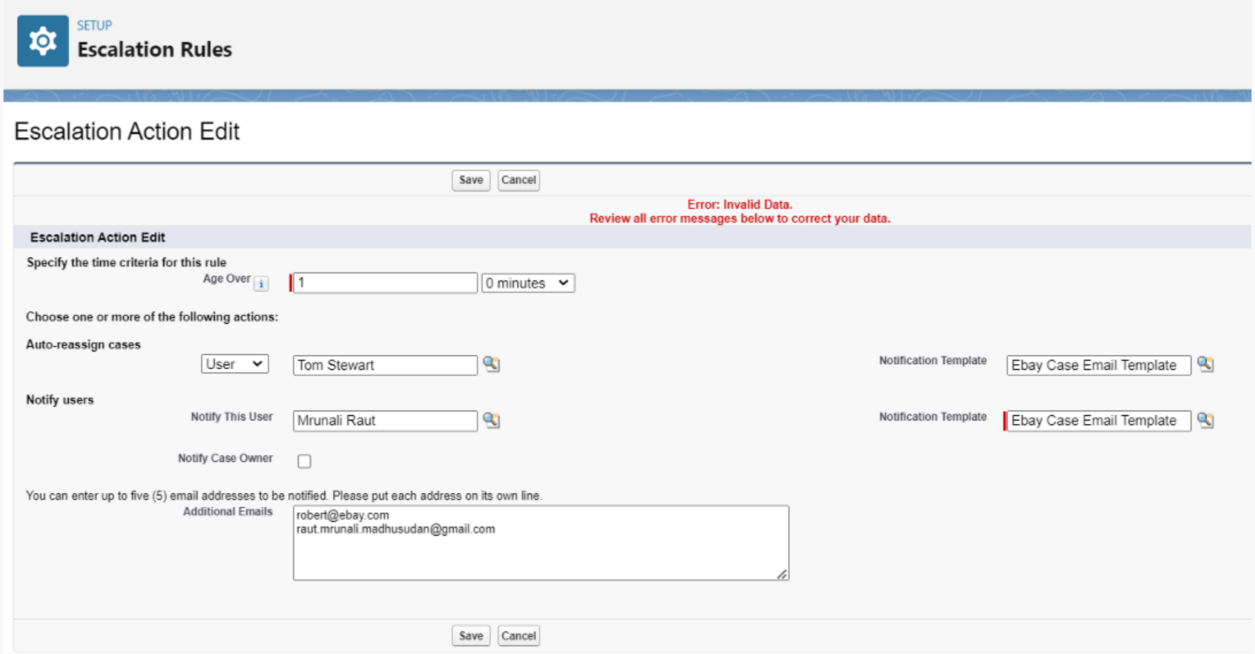
Subject Case Escalation: Case has been escalated

Plain Text Preview

Hello Sir,

The {!Case.CaseNumber} case having {!Case.Id} case ID has been escalated.
Kindly check.

Thanks,
Ebay



Escalation Action Edit

Error: Invalid Data.
Review all error messages below to correct your data.

Escalation Action Edit

Specify the time criteria for this rule

Age Over: 1 | 0 minutes

Choose one or more of the following actions:

Auto-reassign cases

User Tom Stewart
Notification Template Ebay Case Email Template

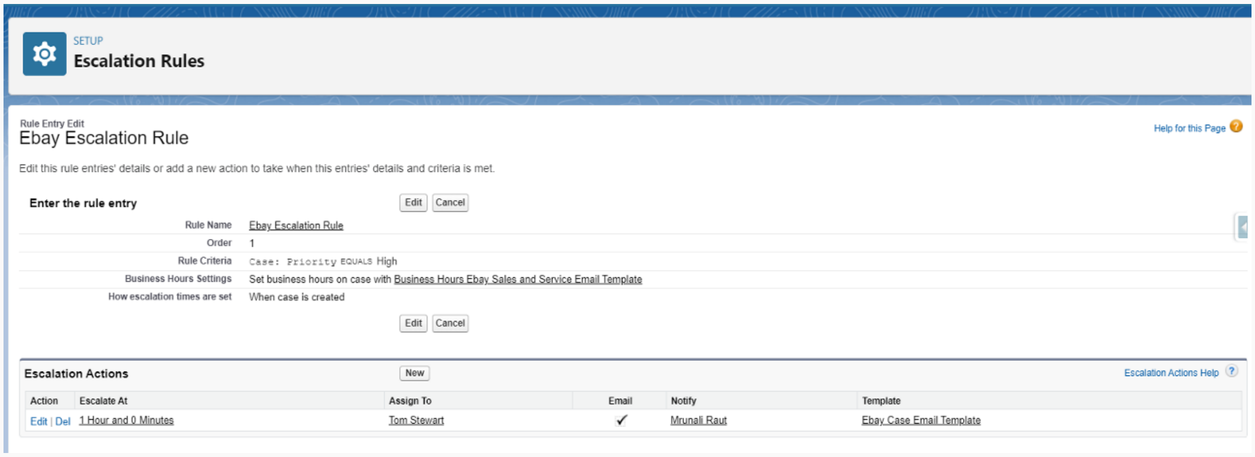
Notify users

Notify This User Mrunali Raut
Notification Template Ebay Case Email Template

Notify Case Owner ☐

You can enter up to five (5) email addresses to be notified. Please put each address on its own line.

Additional Emails:
robert@ebay.com
raut.mrunali.madhusudan@gmail.com


SETUP
Escalation Rules
Help for this Page
Edit
Cancel
New
Escalation Actions Help

Rule Entry Edit

Ebay Escalation Rule

Edit this rule entries' details or add a new action to take when this entries' details and criteria is met.

Enter the rule entry

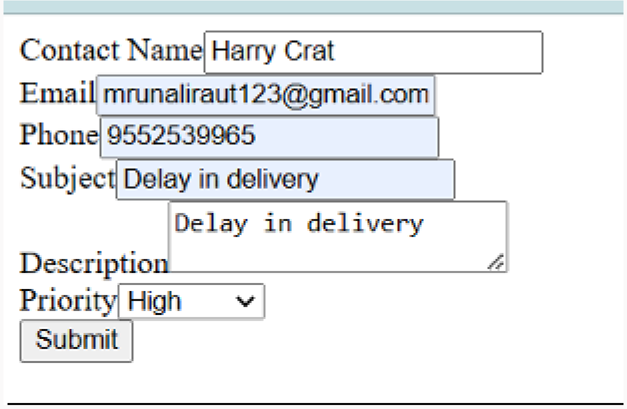
Rule Name	Ebay Escalation Rule
Order	1
Rule Criteria	Case: Priority EQUALS High
Business Hours Settings	Set business hours on case with Business Hours Ebay Sales and Service Email Template
How escalation times are set	When case is created

Escalation Actions

Action	Escalate At	Assign To	Email	Notify	Template
Edit | Del	1 Hour and 0 Minutes	Tom Stewart	✓	Mrunali Raut	Ebay Case Email Template

Testing:

Record 1 (we will wait for one hour for it to escalate and send email automatically.)



Contact Name Harry Crat

Email mrunaliraut123@gmail.com

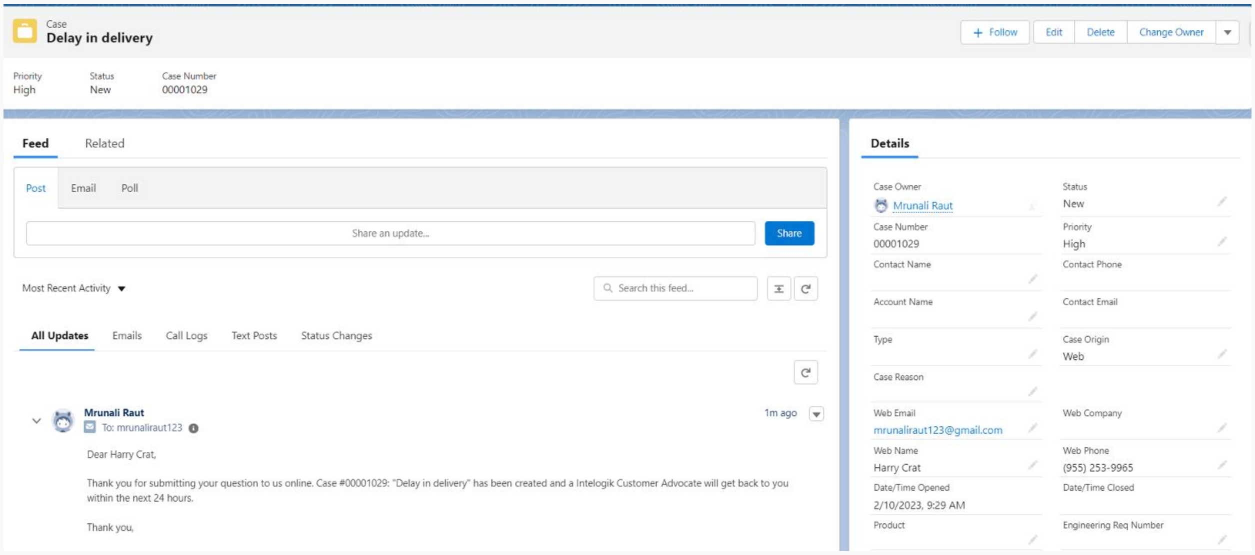
Phone 9552539965

Subject Delay in delivery

Description Delay in delivery

Priority High

Record is created:


Case
Delay in delivery
+ Follow
Edit
Delete
Change Owner
Feed
Related
Post
Email
Poll
Share an update...
Share
Most Recent Activity
Search this feed...
All Updates
Emails
Call Logs
Text Posts
Status Changes
1m ago
Details

Priority High · Status New · Case Number 00001029

Mrunali Raut

To: mrunaliraut123

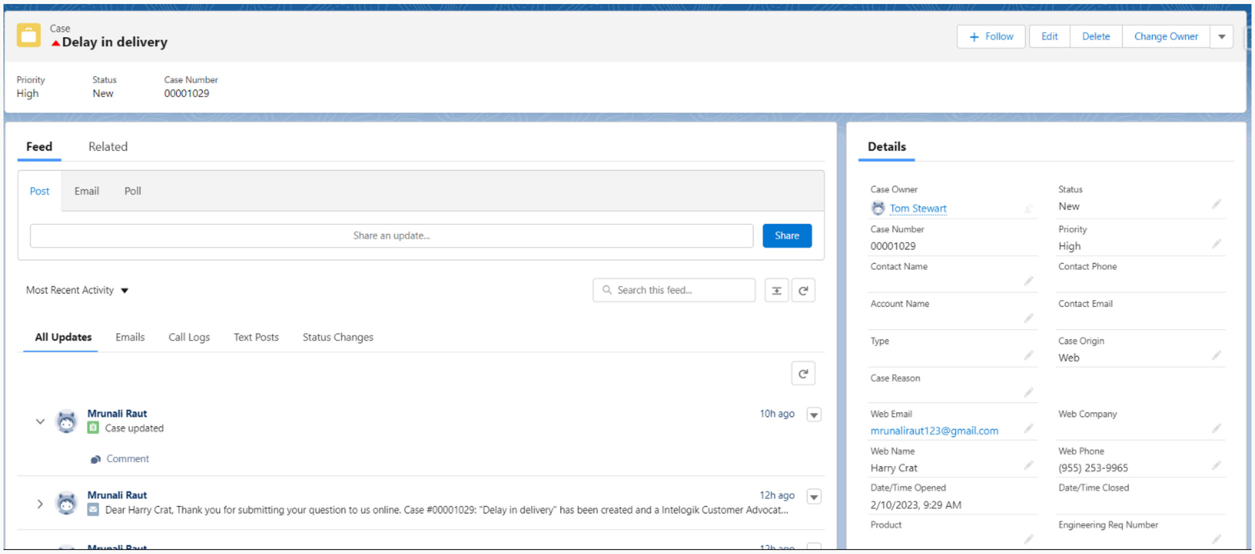
Dear Harry Crat,

Thank you for submitting your question to us online. Case #00001029: "Delay in delivery" has been created and a Intelogik Customer Advocate will get back to you within the next 24 hours.

Thank you,

Case Owner: Mrunali Raut	Status: New
Case Number: 00001029	Priority: High
Contact Name:	Contact Phone:
Account Name:	Contact Email:
Type:	Case Origin: Web
Case Reason:	
Web Email: mrunaliraut123@gmail.com	Web Company:
Web Name: Harry Crat	Web Phone: (955) 253-9965
Date/Time Opened: 2/10/2023, 9:29 AM	Date/Time Closed:
Product:	Engineering Req Number:

It is escalated and email is sent.


+ Follow
Edit
Delete
Change Owner
Feed
Related
Post
Email
Poll
Share an update...
Share
Most Recent Activity
Search this feed...
All Updates
Emails
Call Logs
Text Posts
Status Changes
Comment
Details

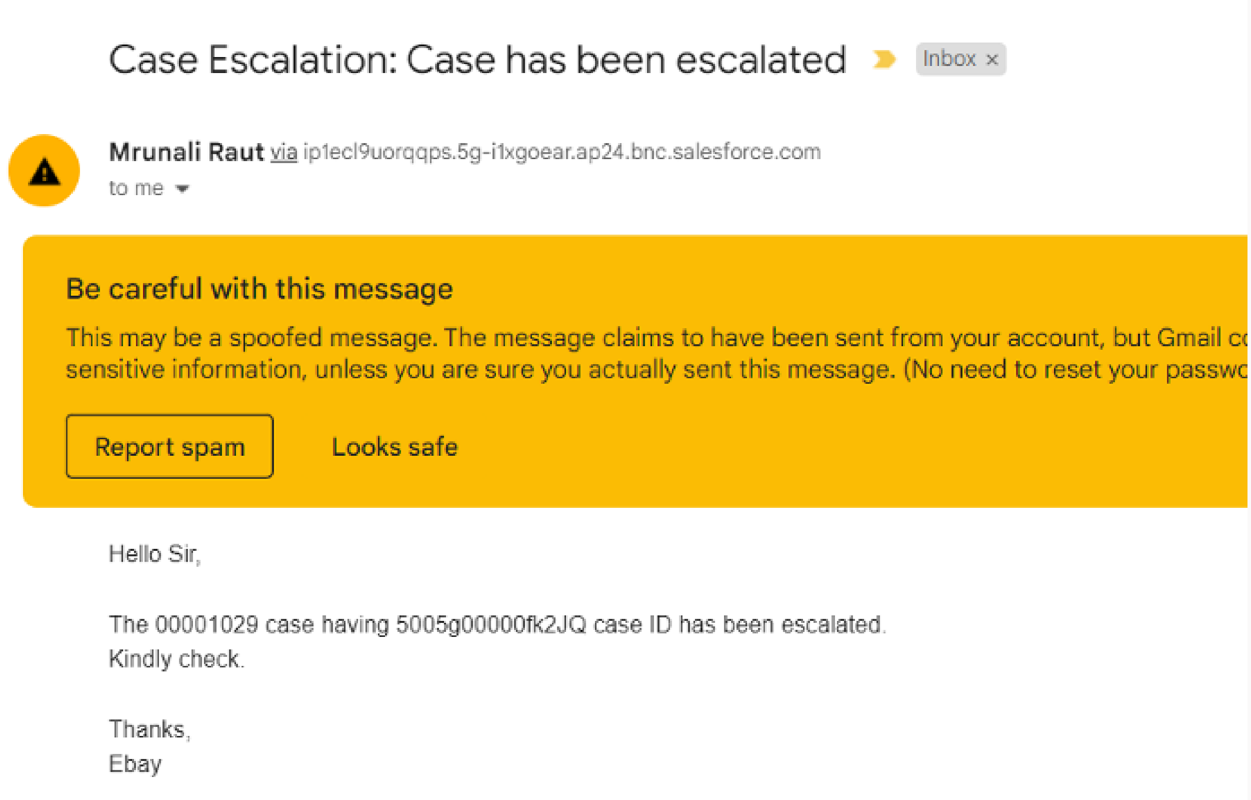
Case
Delay in delivery

Priority: High
Status: New
Case Number: 00001029

Mrunali Raut 10h ago
Case updated

Mrunali Raut 12h ago
Dear Harry Crat, Thank you for submitting your question to us online. Case #00001029: "Delay in delivery" has been created and a Intelogik Customer Advocat...

Case Owner Tom Stewart	Status New
Case Number 00001029	Priority High
Contact Name	Contact Phone
Account Name	Contact Email
Type	Case Origin Web
Case Reason	
Web Email mrunaliraut123@gmail.com	Web Company
Web Name Harry Crat	Web Phone (955) 253-9965
Date/Time Opened 2/10/2023, 9:29 AM	Date/Time Closed
Product	Engineering Req Number


Inbox ×
Report spam
Looks safe

Case Escalation: Case has been escalated

Mrunali Raut via ip1ecl9uorqqps.5g-i1xgoear.ap24.bnc.salesforce.com
to me

Be careful with this message

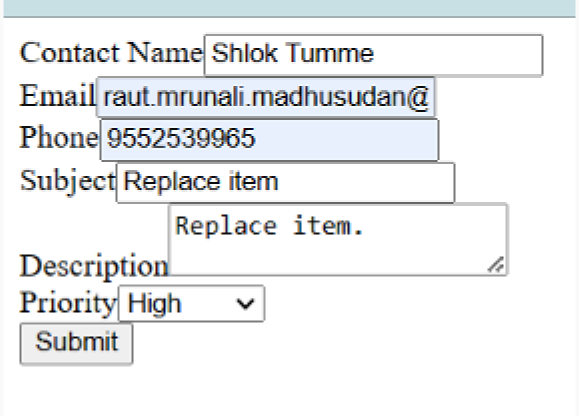
This may be a spoofed message. The message claims to have been sent from your account, but Gmail c
sensitive information, unless you are sure you actually sent this message. (No need to reset your passw

Hello Sir,

The 00001029 case having 5005g00000fk2JQ case ID has been escalated.
Kindly check.

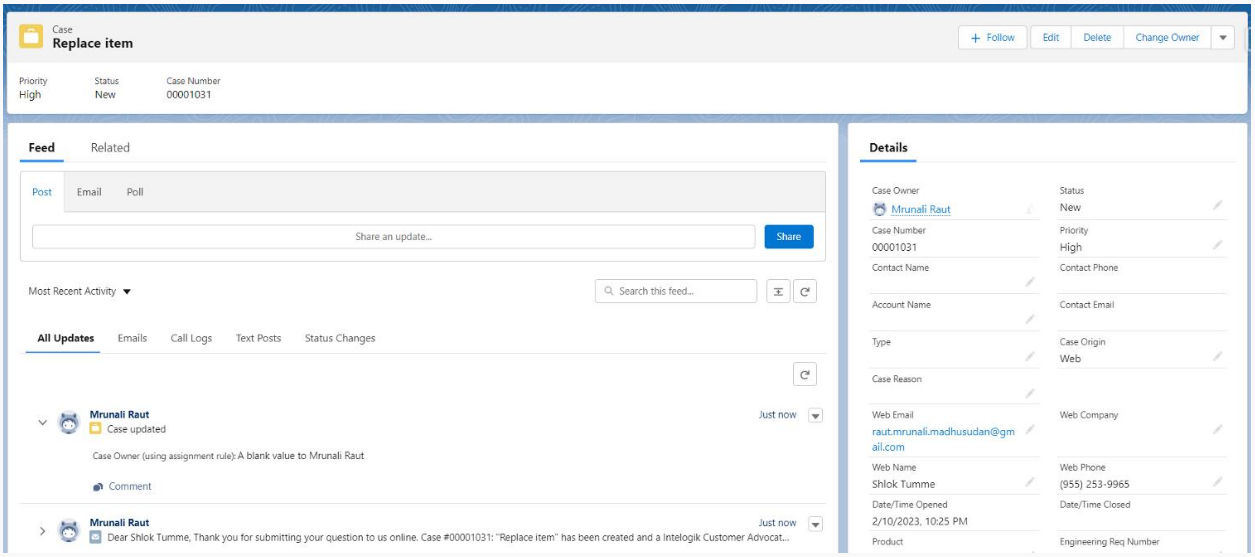
Thanks,
Ebay

Record 2: here we will change the status to close manually and observe that no escalation should happened and no email should be sent.



Contact Name: Shlok Tumme
Email: raut.mrunali.madhusudan@
Phone: 9552539965
Subject: Replace item
Description: Replace item.
Priority: High

Record is created and we changed the status to closed.



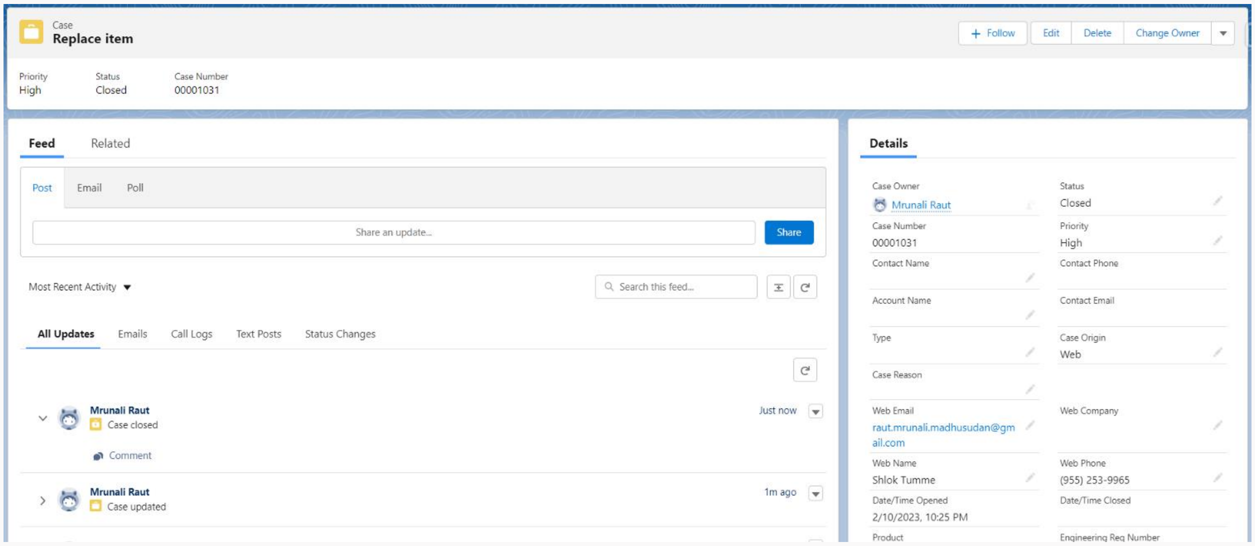
Case
Replace item
+ Follow
Edit
Delete
Change Owner
Feed
Related
Post
Email
Poll
Share an update...
Share
Most Recent Activity
Search this feed...
All Updates
Emails
Call Logs
Text Posts
Status Changes
Comment
Details

Priority: High
Status: New
Case Number: 00001031

Mrunali Raut — Case updated — Just now
Case Owner (using assignment rule): A blank value to Mrunali Raut

Mrunali Raut — Just now
Dear Shlok Tumme, Thank you for submitting your question to us online. Case #00001031: "Replace item" has been created and a Intelogik Customer Advocat...

Case Owner: Mrunali Raut
Status: New
Case Number: 00001031
Priority: High
Contact Name:
Contact Phone:
Account Name:
Contact Email:
Type:
Case Origin: Web
Case Reason:
Web Email: raut.mrunali.madhusudan@gmail.com
Web Company:
Web Name: Shlok Tumme
Web Phone: (955) 253-9965
Date/Time Opened: 2/10/2023, 10:25 PM
Date/Time Closed:
Product:
Engineering Req Number:



Case
Replace item
+ Follow
Edit
Delete
Change Owner
Feed
Related
Post
Email
Poll
Share an update...
Share
Most Recent Activity
Search this feed...
All Updates
Emails
Call Logs
Text Posts
Status Changes
Comment
Details

Priority: High
Status: Closed
Case Number: 00001031

Mrunali Raut — Case closed — Just now

Mrunali Raut — Case updated — 1m ago

Case Owner: Mrunali Raut
Status: Closed
Case Number: 00001031
Priority: High
Contact Name:
Contact Phone:
Account Name:
Contact Email:
Type:
Case Origin: Web
Case Reason:
Web Email: raut.mrunali.madhusudan@gmail.com
Web Company:
Web Name: Shlok Tumme
Web Phone: (955) 253-9965
Date/Time Opened: 2/10/2023, 10:25 PM
Date/Time Closed:
Product:
Engineering Req Number: