

Salesforce Practice Project

Project on Helping Hand Services

About Project

The Helping Hand Services is a service-based organisation which provides various day to day life services. It will provide an expert for different type of services like Academic Service, Gardening Services, Household services, Kitchen Services, Transport services, Babysitting services etc.

Business Requirement

To manage such a system, we need a platform. Salesforce has been used to carry out the whole process as it collects all the data related to customers, workers/service providers, services provided. This data helps in making decisions for the growth as well as for improving the profit margin of the organization. Requirements for this business are below

- Platform for customer to raise a request and track status.
- Platform for worker/service provider to see assigned and completed requests.
- Platform for helping service admin to manage all the data regarding request, services, customer and workers/service providers.

End User Functionality

- The end user customer or worker should authorize themselves by providing registered email address and valid User Id into the public site.
- After customer get authorized he/she must be able to create an order request with description of service what user want and date when they want service and track status of request.
- When request get submitted all the worker get email regarding request. To accept this request worker should reply to the same email. The worker uses public site for tracking assigned orders and customer use public site for crating request and tracking order.

Internal User Functionality

- The admin can manage data related to customer, services, service providers, request and orders.
- The helping hand admin will use salesforce to assign request to the specified worker and create order for that request.
- Based on the worker only related services will be displayed in services lookup.
- When order get created the worker and customer get the conformation mail.
- The helping hand admin can able to create insights in terms of reports and dashboards.

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Data Model

- **Contact Object**
 - The contact object is used to store the information about customer as well as the workers.
 - There are two record types 1. Customer 2. Worker which are used to create customer and worker records respectively.
- **Order Request Custom object**
 - This object is used to store the request data which is created by the customers from public site.
- **New Order Custom object**
 - This object stores the order data which is created from the request.
- **Services Custom Object**
 - This Object stores the records of services provided by the organization.
- **Services Junction Custom Object**
 - One worker can provide many services and one service is provided by the many workers. So, this object works as a junction object between Contact and service.

Object Specifications

Order__c	Order_Request__c	Contact	Service__c
CreatedBy Lookup(User)	Contact__c Lookup(Contact)	Account Lookup(Account)	CreatedBy Lookup(User)
Customer_Email__c Formula (Text)	CreatedBy Lookup(User)	AssistantName Text(40)	LastModifiedBy Lookup(User)
Customer_Name__c Lookup(Contact)	Description_of_work__c Rich Text Area(32768)	AssistantPhone Phone	Owner Lookup(User+1)
customer_name_for_mail__c Formula (Text)	Execution_Date__c Date	Birthdate Date	Service_ID__c Auto Number
LastModifiedBy Lookup(User)	LastModifiedBy Lookup(User)	CleanStatus Picklist	Name Text(80)
Order_Accepted_Date__c Date	Name Auto Number	Owner Lookup(User)	
Order_Execution_Date__c Date	Owner Lookup(User+1)	RecordType Record Type	
Name Auto Number	Registered_Email_Address__c Email	CreatedBy Lookup(User)	
Order_Request__c Lookup(Order Request)	Status__c Picklist	Jigsaw Text(20)	
Order_Date__c Formula (Date)	User_Id__c Text(20)	Department Text(80)	
Order_Request_No__c Formula (Text)	New_Work_Description__c Long Text Area(32768)	Description Long Text Area(32000)	
Order_Status__c Picklist		DoNotCall Checkbox	
Owner Lookup(User+1)		Email Email	
Service_Durion_in_Hours__c Number(18, 0)		HasOptedOutOfEmail Checkbox	
Services_Junction__c Lookup(Services Junction)		Fax Fax	
New_Work_Description__c Long Text Area(32768)		HasOptedOutOfFax Checkbox	
Worker_Email__c Formula (Text)		GenderIdentity Picklist	
Worker_Name__c Lookup(Contact)		HomePhone Phone	
worker_name_for_mail__c Formula (Text)		Individual Lookup(Individual)	
		Languages__c Text(100)	
		LastModifiedBy Lookup(User)	
		LastCURequestDate Date/Time	
		LastCUUpdateDate Date/Time	

Services_Junction__c
Contact__c Master-Detail(Contact)
Cost_of_Service__c Number(16, 2)
CreatedBy Lookup(User)
Junction_Name_formula__c Formula (Text)
LastModifiedBy Lookup(User)
Service__c Master-Detail(Service)
Name Auto Number

Fig 1: Objects and Fields

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Object Schema

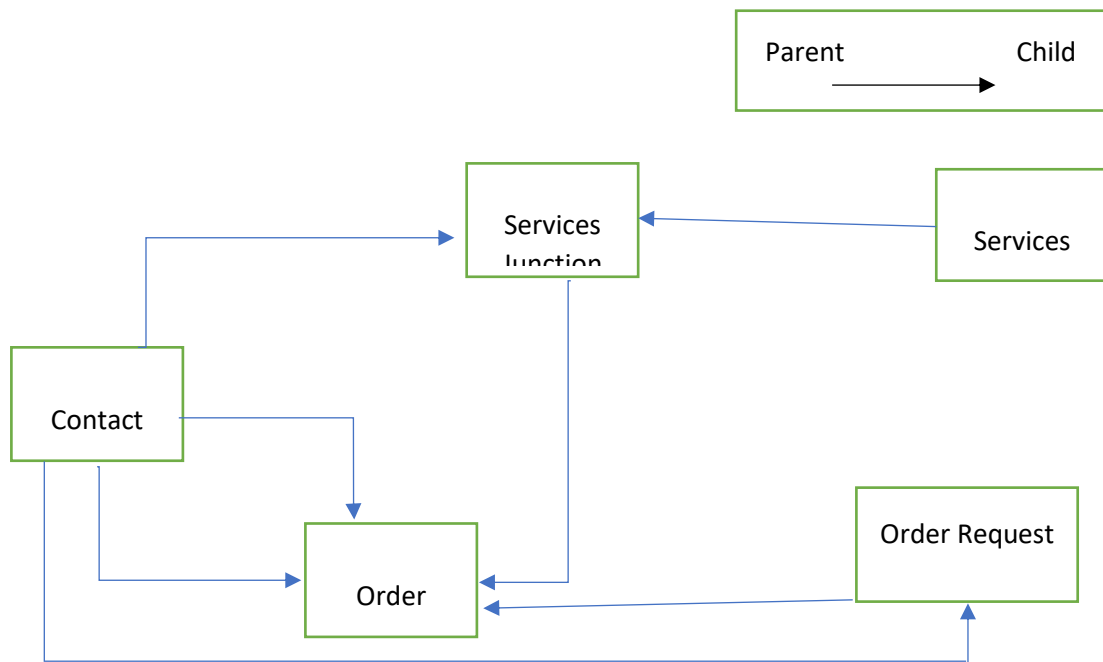


Fig 2: Objects Schema

Customer Flow

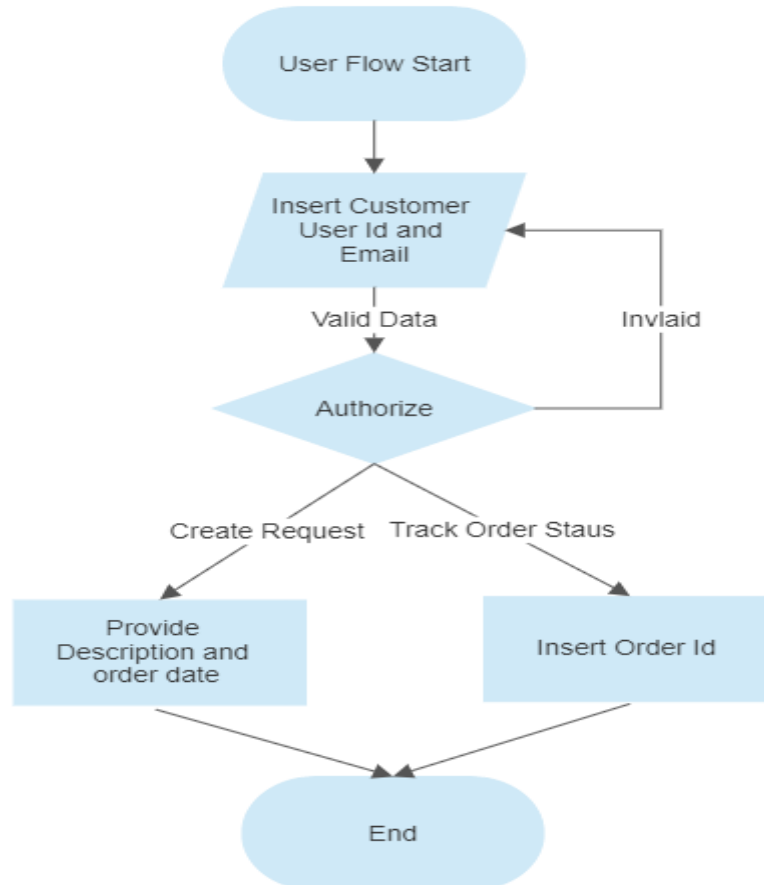


Fig 3: Customers Flow

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Worker Flow

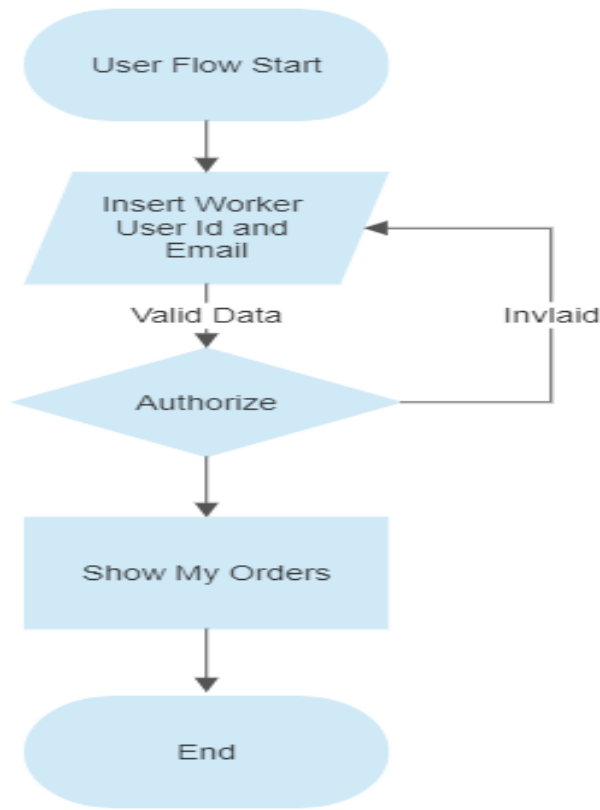


Fig 4: Workers Flow

Screenshots of The Project

Customer flow: Create Request

LOGIN HERE

* User Id

* Registered Email Address

Authorize

Fig 5: Customer Login Page

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Hello Prajwal Khajure

Create Request


Check Status

Fig 6: After Successful Login

Hello Prajwal Khajure

CREATE REQUEST

Create Record

User :  Email : prajwalkh~~ajure~~@gmail.com

Enter short request description

I need gardening service. 1

When ?
Mar 21, 2023

Create

Fig 7: Create Order Request Page

Hello Prajwal Khajure

CREATE REQUEST

YOU REQUEST SUBMITTED SUCCESSFULLY
Please stay tuned for Further updates

Thank You!!

Fig 8: Successful submission of request

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Email Screenshots

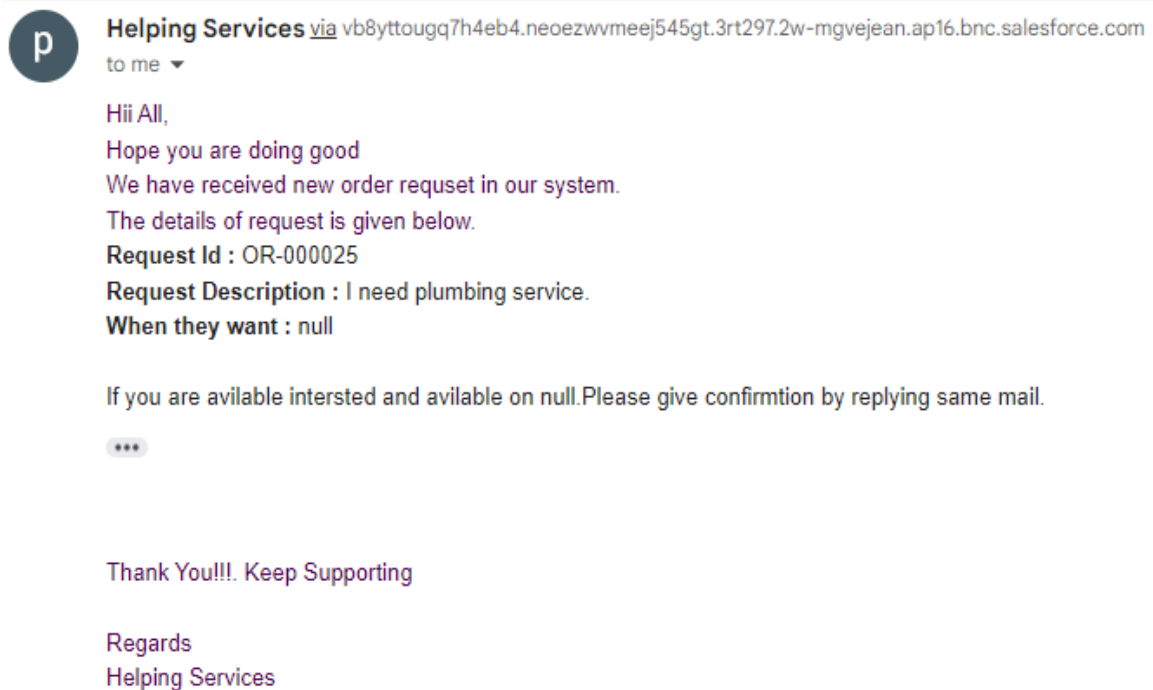


Fig 9: Email to all service providers

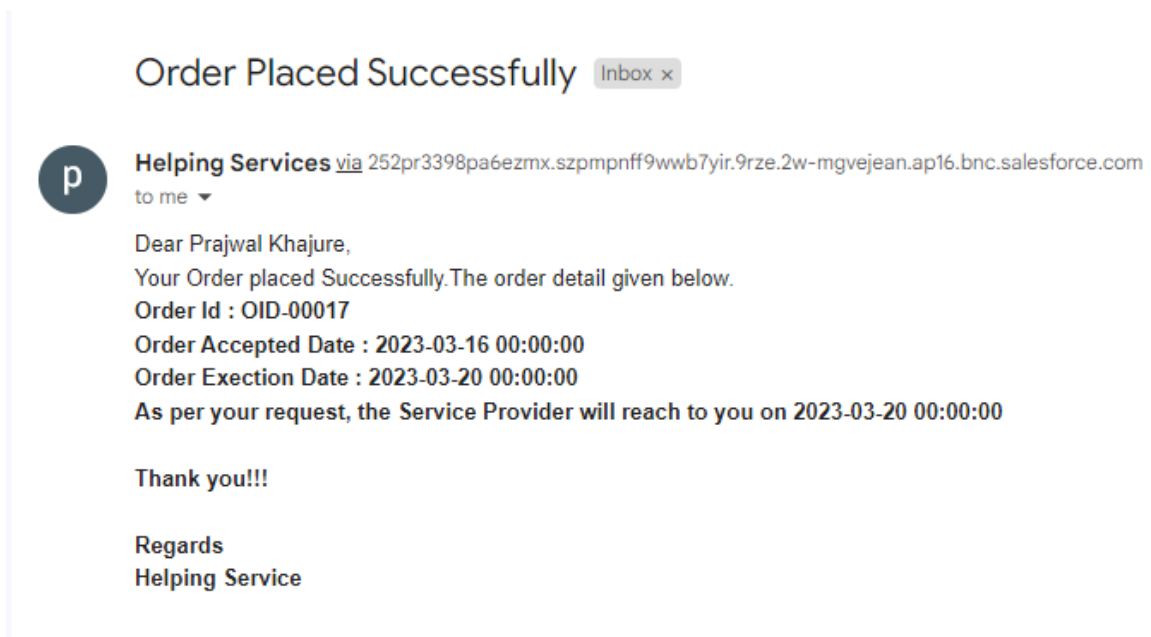


Fig 10: Email to customer after request accepted

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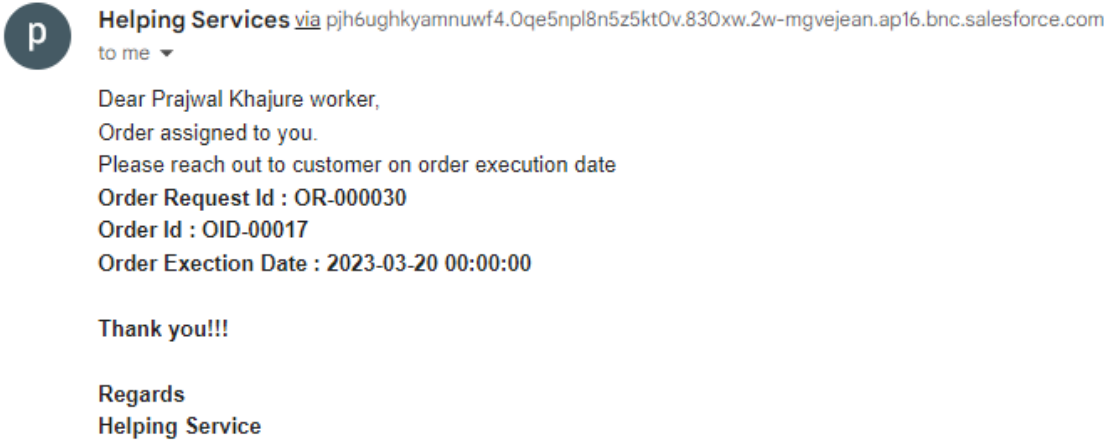


Fig 11: Email to worker after order assigned

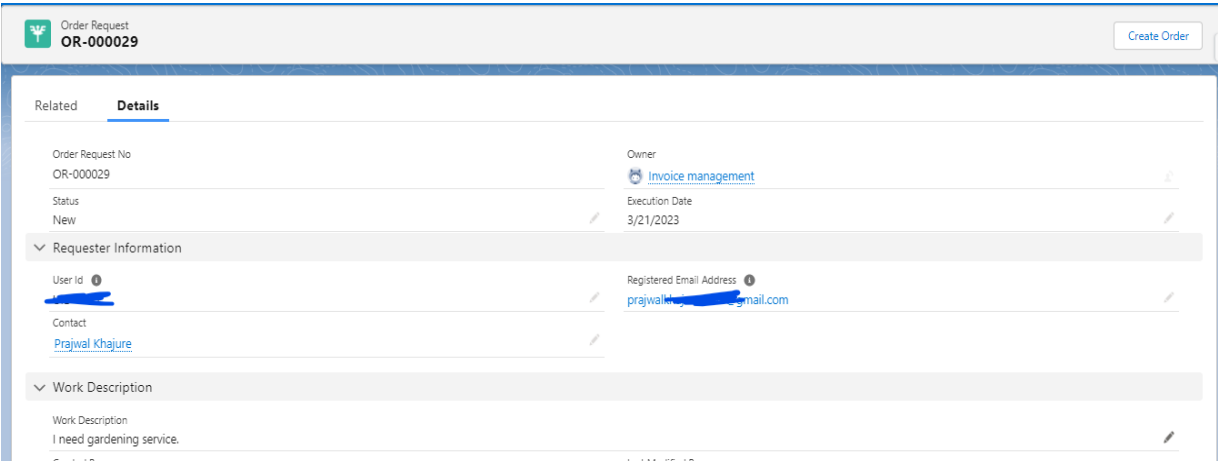


Fig 12: Order request record in org

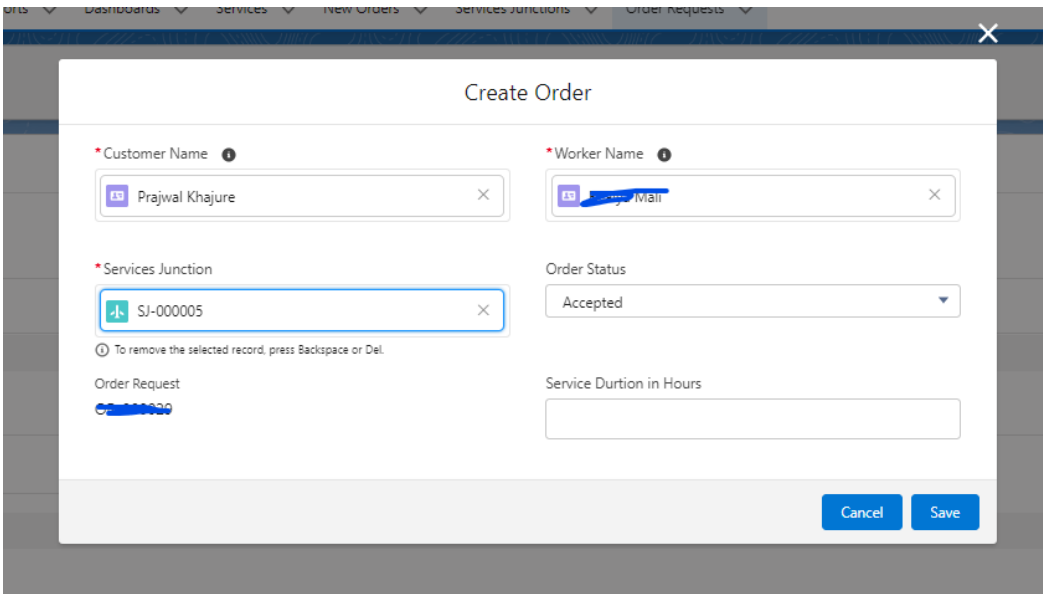


Fig 13: Create Order page

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New Order
OID-00014

Order ID OID-00014	Order Request [redacted]
Customer Name Prajwal Khajure	Service Duration in Hours
Order Status Accepted	Worker Name Prajwal Khajure worker
Services Junction SJ-000008	
Work Description need plumbing service	
Order Request No. [redacted]	

Important Dates

Order Request Date 3/16/2023	Order Accepted Date 3/16/2023
Order Execution Date 3/21/2023	

Fig 14: Created Order for request

Customer flow: Check Status

Hello Prajwal Khajure

Check status

* Enter order Id

type here...

Proceed

Fig 15: Check Status Page

Hello Prajwal Khajure

Check status

* Enter order Id

OID-00014

Proceed

how order data

Order ID	OID-00014	Order Status	Accepted
Order Request Date	3/16/2023	Order Execution Date	3/21/2023

Fig 16: Order Status

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Worker flow: Show my orders

LOGIN HERE

* User Id

* Registered Email Address

[Authorize](#)

Fig 17: Worker Login Page

Service Provider Section

Hello Prajwal Khajure worker

[My Orders](#)

Fig 18: After Successful Login

Service Provider Section			
Hello Prajwal Khajure worker			
My Orders			
My Active Order			
OrderId	Order Date	Order Accepted Date	Order Execution Date
a0Q2w00000DfPWtEAN	2023-03-16	2023-03-16	2023-03-21
a0Q2w00000Df15EAF		2023-03-13	2023-03-29
Completed Order			
OrderId	Order Date	Order Accepted Date	Order Execution Date

Fig 19: Orders Related to Login Worker

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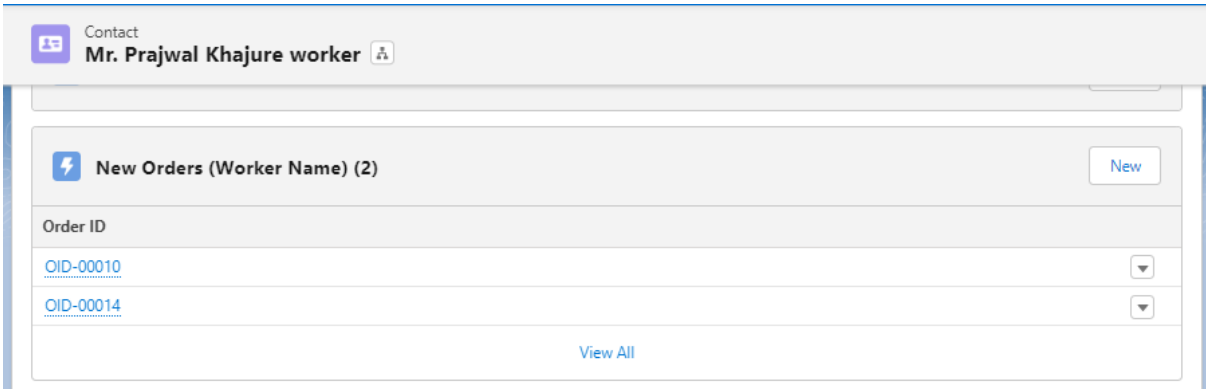


Fig 20: Order related to worker in org

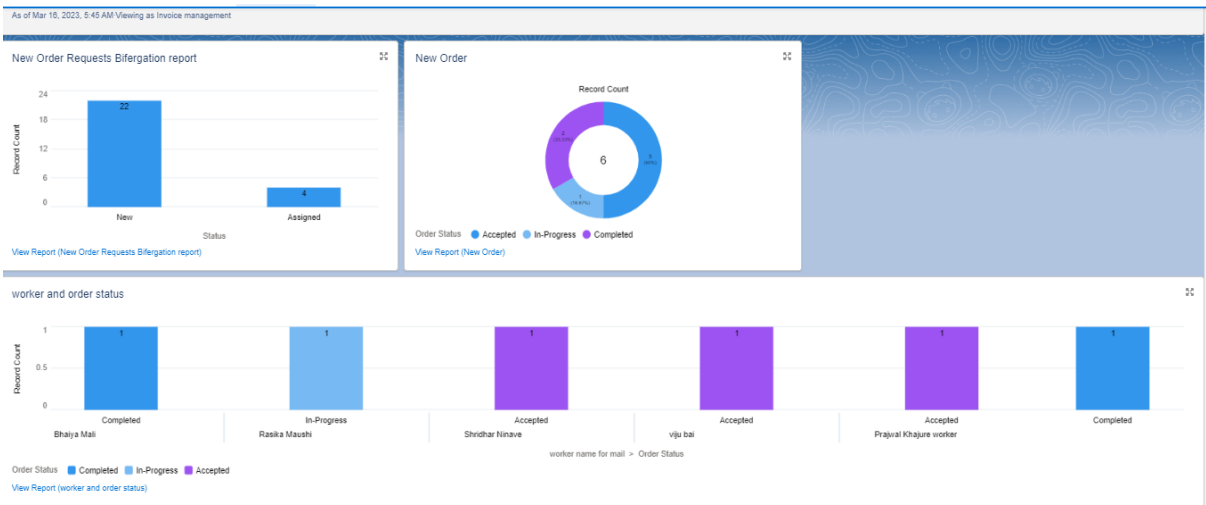


Fig 21: Reports and Dashboards