**CG Sales & Service : Salesforce Implementation for Retail & Supply Chain Optimization**

**Phase:** 10 – Final Documentation & Presentation

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**1. Project Overview**

CG Sales & Service is a Salesforce-based CRM platform designed to streamline **customer management, sales tracking, service requests, and product lifecycle operations** for CG Power and Industrial Solutions.

The system provides a **centralized platform** for managing Accounts, Transactions, and Service Requests, ensuring improved efficiency across sales and after-sales service processes.

Through 10 structured phases, the project addressed challenges in order management, warranty tracking, and field service management. The solution was built with Salesforce's core features, including **custom objects, data modeling, automation, Apex programming, integrations, and dashboards**.

The project delivered a complete solution where:

- Customers are tracked via Accounts and Transactions.
- Service requests (maintenance, repairs, warranties) are logged and monitored.
- Field technicians are assigned service jobs through Salesforce.
- Managers gain real-time visibility into **sales, service operations, and revenue** through dashboards.

This enables CG Power to enhance **customer satisfaction, reduce service delays, and improve business efficiency**.

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**2. Problem Statement**

Traditional systems in sales and service management often face limitations, including:

- Fragmented customer data spread across multiple platforms.
- Difficulty in tracking **service requests, warranties, and technician performance**.
- Lack of real-time reporting for managers to make informed decisions.
- Manual order and service request handling, increasing errors and delays.
- Limited transparency between sales, service, and customer support teams.

As a result, organizations experience poor customer satisfaction, delayed service fulfillment, and missed revenue opportunities.

There was a strong need for a **centralized Salesforce solution** to connect customer sales and service operations, ensuring **automation, transparency, and better decision-making**.

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**3. Solution Overview**

The CG Sales & Service project was implemented in Salesforce with the following key features:

- **Service Request Form** to log and track maintenance and repair requests.
- **Transactions and Transaction Line Items** to capture billing and order details.
- **Validation Rules & Flows** to enforce data accuracy and automate record updates.
- **Reports and Dashboards** for managers to analyze service effectiveness and sales performance.

By focusing on these features, the project ensures **customer satisfaction, operational efficiency, and strong business alignment**.

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**4. Project Phases & Deliverables**

**Phase 1: Problem Understanding & Industry Analysis**

- Identified inefficiencies in service request handling and order tracking.
- Validated need for real-time dashboards, automated service workflows, and warranty management.

**Phase 2: Org Setup & Configuration**

- Created Salesforce Developer Org.
- Configured **Company Profile, Users, Roles, and Permission Sets**.
- Defined security with OWD, Profiles, and Field-Level Security.

**Phase 3: Data Modeling & Relationships**

- Created custom objects:
    - **Service_Request__c** → Service Request Form.
    - **Transaction__c** → Customer billing and order record.
    - **Transaction_Line_Item__c** → Line-level product/service details.
- Used Schema Builder for relationships.
- Configured Page Layouts, Record Types, and Compact Layouts.

**Phase 4: Process Automation**

- Created **Flows** for field updates (status changes when payment = Paid).
- Automated task creation if payment status = False.
- Implemented validation rules for mandatory fields.

**Phase 5: Apex Development**

- Apex triggers to update Service Request Form status after payment.

- Batch Apex for processing multiple unpaid service requests.
- Scheduled Apex to run batch jobs monthly.
- Exception handling with try-catch.
- Achieved **100% code coverage** with test classes.

**Phase 6: User Interface Development**

- Configured **Lightning Record Pages, Tabs, Home Page Layouts, and Utility Bar**.
- Used standard Salesforce UI for navigation.
- Integrated Apex logic with triggers.

**Phase 7: Integration & External Access**

- Configured **Named Credentials & Remote Site Settings** for API callouts.
- Used **Workbench** for external service testing.
- REST API implemented for external system interaction.

**Phase 8: Data Management & Deployment**

- Imported sample data using **Data Import Wizard** and **Data Loader**.
- Configured duplicate rules for Accounts and Service Requests.
- Scheduled monthly **data export backups**.
- Deployed metadata with **Change Sets**.
- Apex was used for custom business logic instead of SFDX.

**Phase 9: Reporting & Dashboards**

- Built Reports:
    - **Service Performance Report** → Status of service requests.
    - **Sales by Transaction Report** → Revenue breakdown.
    - **Technician Assignment Report** → Jobs assigned and completed.
- Created **CG Sales & Service Dashboard** with bar, donut, and matrix charts.
- Configured dashboard filters and subscriptions for managers.

**Phase 10: Final Documentation & Presentation**

- Compiled project into documentation and presentation.
- Demo included Service Request Form, Transactions, Flows, Triggers, and Dashboards.
- Delivered Salesforce-based solution for **customer lifecycle and service management**.

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**5. Security & Compliance**

- **OWD, Roles, and Sharing Rules** configured for secure record access.
- **Field-Level Security (FLS)** ensured sensitive fields like Payment Status were protected.
- **Audit Trail** used for tracking admin activity and field history.

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**6. Project Outcomes**

- A unified Salesforce CRM for managing customers, transactions, and service requests.
- Automated workflows reduced manual errors and improved service efficiency.
- Apex triggers and batch jobs ensured timely updates and scheduled tasks.
- Dashboards provided real-time insights for managers.

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**7. Future Enhancements**

- **Einstein AI** for predictive analytics on service delays and customer churn.
- **Mobile App Integration** for technicians to update jobs on-site.
- **Omni-Channel Support** for real-time customer service across multiple platforms.

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**8. Conclusion**

The CG Sales & Service project successfully automated **customer management, service request handling, and transaction tracking** in Salesforce.

By integrating **automation, Apex, and dashboards**, the system ensures better customer satisfaction, operational efficiency, and decision-making for managers.

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**Final Status:** Project Completed (Phase 1–10).
**Deliverables:** Documentation, Apex Triggers, Workflows, Dashboards, and PPT.