

# Project 1

## USE CASE:

The associate should create a custom Salesforce application based on a business of their choosing. Note that although this is an individual project, there is a team aspect to the project presentation.

## CORE REQUIREMENTS:

The following are minimum requirements for the project and will result in a 70% score if completed. Implementing peripheral requirements will add to this baseline to increase the overall score up to 100%. Projects represent most of performance evaluations in terms of weight so consider goals for peripheral requirements and further customizations carefully.

## GIT:

- The associate squad should maintain a group GitHub repo that contains branches for their individual work.

## SDLC:

- While working on this project, the associate should maintain a Scrumban workflow using daily standups to discuss and keep all squad members apprised of everyone's status.
- A Kanban board should be utilized to track the associate's tasks and progress throughout the project.
  - The Kanban board should be on the squad GitHub repo.
- Standup notes should be maintained on each member's branches and feature their own notes from every standup in a markdown file.

## PRESENTATION:

- The associate should create and practice a two-part presentation alongside their squad mates.
  - Part one should be a carefully considered slide deck that details the following:
    - An introduction of the squad.
    - The provided use case.
    - The SDLC practices leveraged to complete it.
    - The tools used to complete the project.
    - Any portions of the project that do not lend themselves to the live demo.
  - Part two should be a live demo of the project for the audience.

- Following the demo, the associate should have a wrap up section that thanks the audience and offers a chance for questions.
- The presentation should last no longer than five minutes per member of the squad.

#### ERD:

- Prior to beginning work on the org, the associate should create an ERD mockup of the org they intend to create. This original mockup should be uploaded to their branch on the squad repo.

#### SALES CLOUD:

- Leads & Opportunities should be customized as needed to reflect the business being modeled.
  - Leads should have at least three assignment rules determining different lead ownership.
  - Web-to-lead should be set up to allow a customer to submit a lead.
  - An Opportunity path should provide step by step guidance and a celebratory effect upon completion.
- Products should be configured to reflect the products and services the business offers.
- Pricebooks should be used for the products offered by the business, and there should be at least one alternate pricebook.

#### SERVICE CLOUD:

- Ensure cases are configured to accurately represent business needs.
  - Cases should have at least three assignment rules determining different case ownership.
  - Cases should have at least three escalation rules.
  - Web-to-Case should be set up to allow a customer to submit a case.
  - Case paths should offer step by step guidance on cases.

#### DATA MODEL:

- The data model should offer a reasonable interpretation of the selected business.
- It should demonstrate understanding of distinct types of relationship fields in Salesforce including Lookup & Master-Detail.
- It should demonstrate the associate's understanding on junction objects.

#### SECURITY:

- Org level security should be configured for at least two distinct profiles.
- Object level security should be configured for at least three distinct user types, including members of sales and service teams.

- Record level security & access should be configured for the organization.
  - Org wide defaults should be configured.
  - Role Hierarchy should be configured.
  - Sharing Rules should be established with at least three distinct rules covering both owner and criteria-based rules.
  - Manual sharing should be configured.
- Field level security should be configured.

#### UI (USER INTERFACE) CUSTOMIZATION:

- There should be at least one custom app which includes a custom home page.
- Custom and standard objects should have configured page layouts.
- Record types should be utilized for at least one object and with a minimum of two types.
- There should be at least one object-specific quick action and one global quick action.

#### PROCESS AUTOMATION:

- There should be a minimum of one of each of the following:
  - Screen Flow
  - Before-save Flow
  - After-save Flow
  - Autolaunched Flow
- Flows should feature interaction with the database and should demonstrate an understanding of working with single and bulk records.

#### REPORTS & DASHBOARDS

- Use of both a Standard Report Type & Custom Report Type.

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#### PERIPHERAL REQUIREMENTS:

While the core requirements will reach 70%, the associate can go beyond that with your own customizations and ideas. Below are a list of peripheral items that can be implemented, but feel free to come up with personal, unique additions as well.

#### SALES CLOUD (PERIPHERAL):

- Multilevel campaigns at least three deep should be set up to reflect the business.

#### SERVICE CLOUD (PERIPHERAL):

- Email-to-Case should be set up to allow a customer to submit a case.

#### UI (USER INTERFACE) CUSTOMIZATION (PERIPHERAL):

- Dynamic forms should be set up on at least one object.

#### PROCESS AUTOMATION (PERIPHERAL)

- The following process automation tools should be implemented:
  - Workflow Rule
  - Process configured through Process Builder
  - Multi-step Approval Process
  - Schedule-Triggered Flow
  - Platform Event-Triggered Flow

#### REPORTS & DASHBOARDS (PERIPHERAL)

- A report of each report format.
- A dashboard that provides visualizations of each of these reports to be used on the custom app homepage.
- Proper sharing configured through folders for both dashboards and reports across multiple users.