

# Phase 10: Final Presentation & Demo Day

## Objective:

- Present the completed **Retail CRM Salesforce project** to stakeholders or evaluators.
  - Demonstrate key features: Accounts, Orders, Products, Order Line Items, automation, Apex triggers, flows, reports, dashboards.
  - Highlight business impact, improved workflows, and actionable insights.
  - Ensure everything works correctly for the live demonstration.
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## Step 1: Prepare the Presentation

Include the following sections:

### 1. Project Overview

- Purpose: Centralize customer, order, and service data for a retail company.
- Objectives: Automate order and service workflows, provide real-time dashboards, enable personalized marketing, improve customer experience.
- Scope: Accounts, Products, Orders, Order Line Items, automation, Apex, flows, reports, dashboards, security setup.

### 2. Phase-wise Implementation

- **Phase 1–4:** Requirement gathering, org setup, data modeling, and process automation.
- **Phase 5:** Apex triggers for Order Line Items and Total Amount calculation.
- **Phase 6:** Lightning pages and UI customization.
- **Phase 7:** App creation for navigation.

- **Phase 8:** Data import using CSV for Accounts, Products, Orders.
- **Phase 9:** Reports, dashboards, and security configuration.

### 3. Key Features

- Automation: Record-triggered flows for notifications and approval processes.
- Apex: Triggers to calculate Order totals and enforce business logic.
- Lightning Pages: Record pages, tabs, and related lists for easy navigation.

### 4. Reports & Dashboards

- Top Products by Sales: Bar chart grouped by Product.
- High-Value Orders: Table with Orders above ₹50,000.
- Customer Accounts by City: Pie chart showing distribution.

### 5. Data Management

- Sample data imported for Accounts, Products, Orders, and Order Line Items.
- Duplicate rules and validation rules applied to maintain data quality.

### 6. Security & Access Control

- Profiles and permission sets configured for Sales Agent, Service Agent, and Admin.
- Sharing rules enforce record visibility.
- Field-level security ensures sensitive data protection.

### 7. Business Impact

- Centralized order management reduces manual errors.
- Automation improves efficiency for Sales and Service teams.
- Dashboards provide actionable insights for management.

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## Step 2: Demo Environment Setup

1. Open **Salesforce Developer Org** or sandbox.
  2. Ensure sample data is loaded and flows/triggers are active.
  3. Prepare objects with sample data:
    - Accounts with Primary Contact Emails.
    - Products with Unit Price and SKU.
    - Orders and related Order Line Items.
  4. Ensure reports and dashboards are visible and interactive.
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## Step 3: Demo Flow

### 1. Login & Navigation

- Show how users access Salesforce and navigate the **Retail CRM App**.

### 2. Show Key Features

- Create a **new Account** → show automated workflow updating Customer Tier.
- Create a **new Order** with Order Line Items → show Apex trigger calculating Total Amount.
- Demonstrate **Approval Process** for high-value orders (>₹50,000) → record locks and approval history.
- Navigate **Lightning Pages** → show tabs, related lists, and utility bar.

### 3. Reports & Dashboards

- **Top Products by Sales** → Bar chart grouped by Product.
- **High-Value Orders** → Table showing Orders above ₹50,000.
- **Customer Accounts by City** → Pie chart of Account distribution.

### 4. Security Review

- Show **Login as User** → demonstrate restricted access based on profiles.

- Verify field-level security and sharing rules in action.
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## Step 4: Key Highlights to Discuss

- **Automation:** Flows and Apex reduce manual work and enforce business logic.
  - **Reports & Dashboards:** Provide real-time insights for management and sales strategy.
  - **Data Management:** Easy import, validation, and enforcement of duplicate rules.
  - **Security:** Profiles, permission sets, and sharing rules ensure proper access control.
  - **User Experience:** Intuitive Lightning pages, tabs, and related lists improve usability.
  - **Scalability:** The system can handle additional products, orders, and reports in the future.
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## Step 5: Outcome

- Stakeholders see the full working Retail CRM project in Salesforce.
- Demonstrates **Admin + Developer skills** through real business processes.
- Highlights improved workflows, automation, and actionable insights.
- Confirms the project is ready for **handover, submission, or portfolio showcase**.