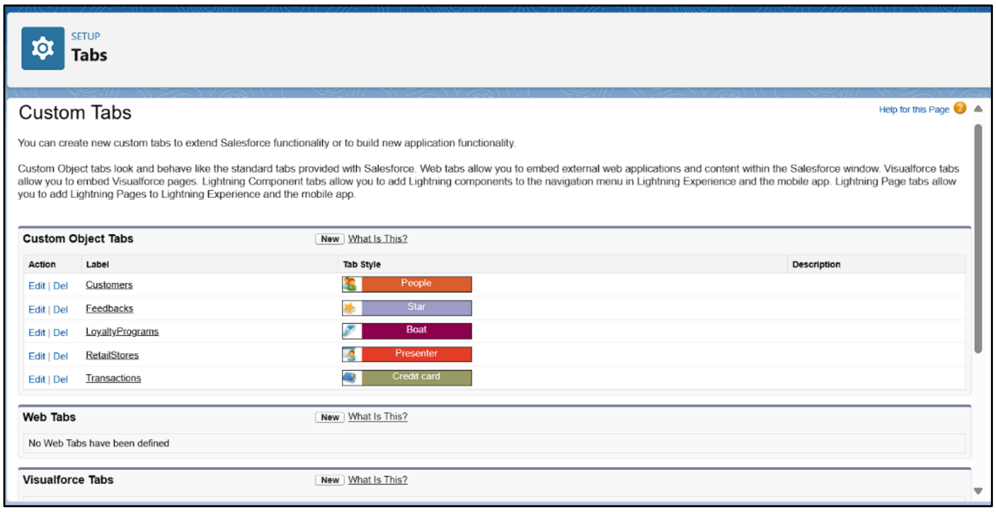
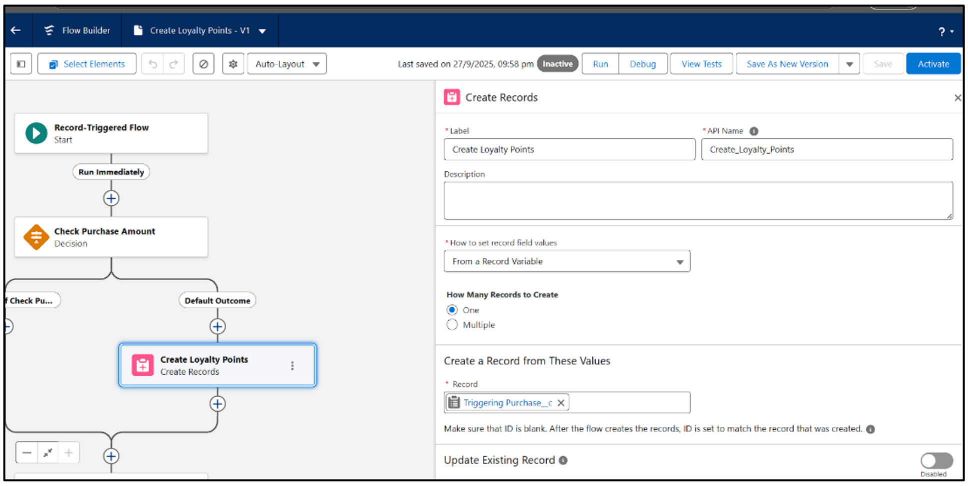
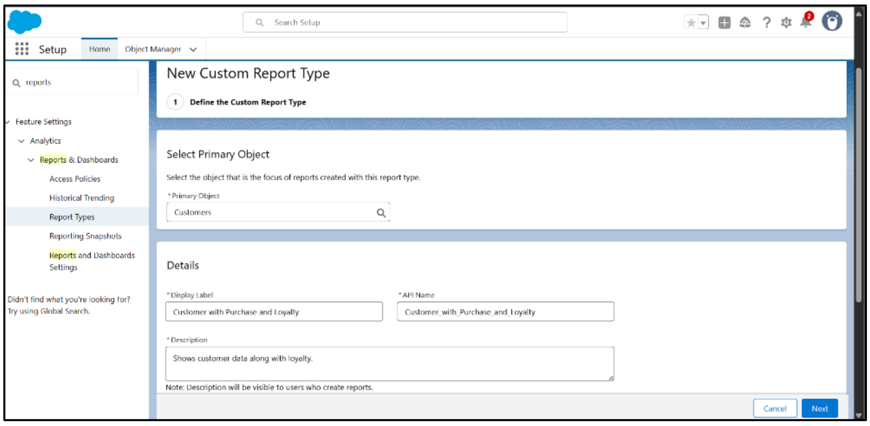
Phase 4: Process Automation(Admin)



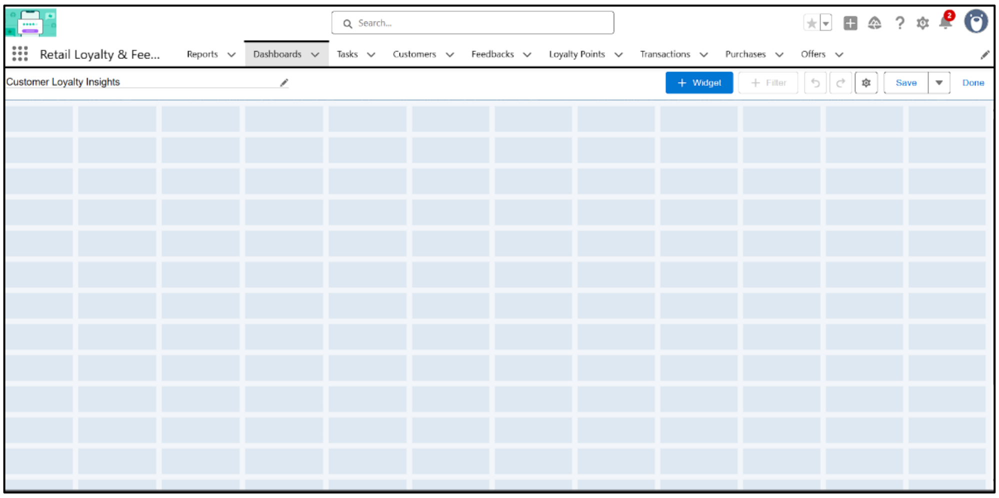
The Custom Tabs section in Salesforce provides a centralized view of all tabs created for custom objects, helping users navigate and manage data efficiently. Each tab is linked to a specific object like Customers, Deals, or Transactions, and styled with icons such as People, Ship, or Credit Card for quick visual identification. These tabs enhance the user interface by allowing direct access to records without needing to search through menus. While descriptions are currently blank, they can be added to clarify each tab's purpose. No web or Visualforce tabs are defined yet, leaving room for future expansion. This setup supports streamlined workflows and improves usability across teams.



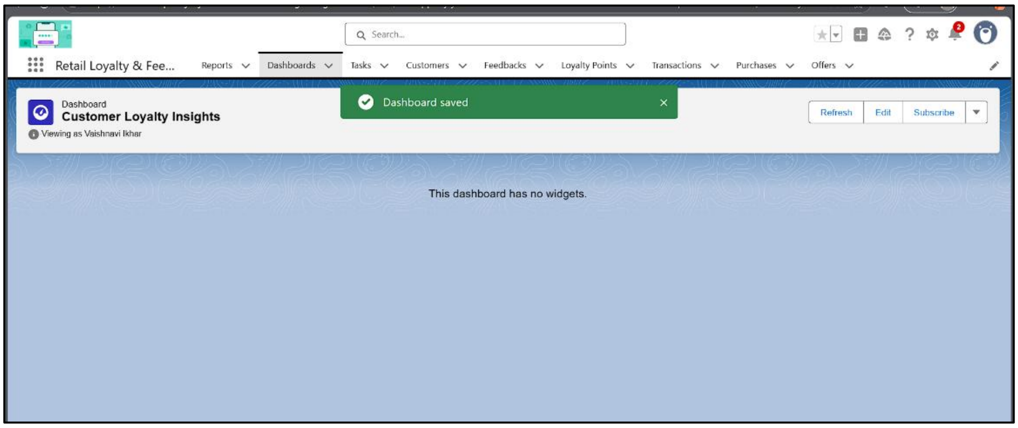
The Create Loyalty Points – V1 flow in Salesforce automates the generation of loyalty point records based on purchase activity. It begins with a record-triggered event and uses a decision element to evaluate the purchase amount. If the criteria are met, the flow proceeds to create a new loyalty point record using values from the Triggering_Purchase__c object. The configuration ensures only one record is created per qualifying transaction, and it does not update existing records. This setup streamlines reward tracking, reduces manual data entry, and supports consistent customer engagement through automated point assignment. It's a scalable approach for managing loyalty programs efficiently.



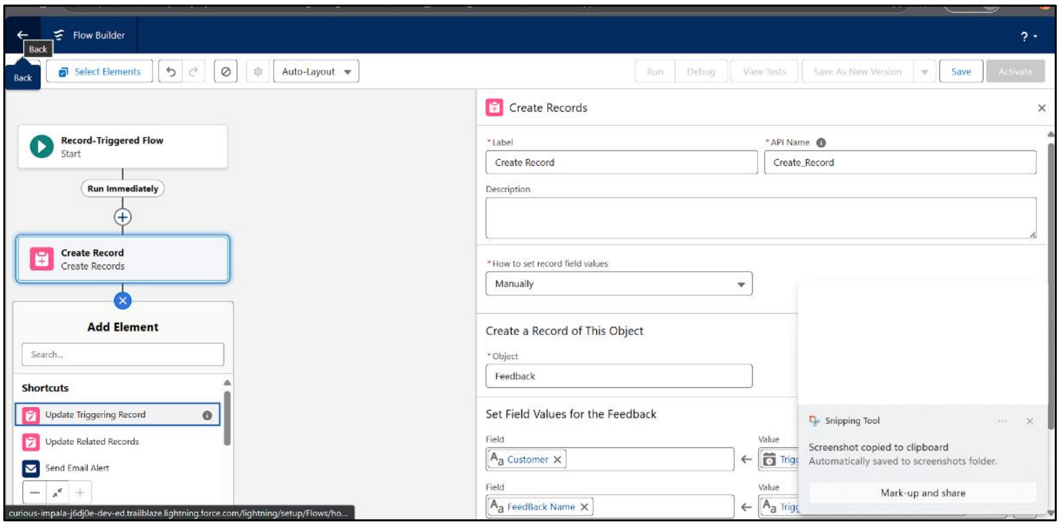
The Customer with Purchase and Loyalty report type in Salesforce is designed to provide a consolidated view of customer data alongside their purchase history and loyalty point activity. It uses the Customer object as the primary source, allowing users to build reports that connect customer profiles with related transactional and reward information. This setup supports deeper insights into customer behavior, engagement, and value. The report type is labeled clearly for ease of use and includes a description to guide users during report creation. It's ideal for sales, service, or marketing teams looking to analyze customer trends and optimize loyalty strategies.



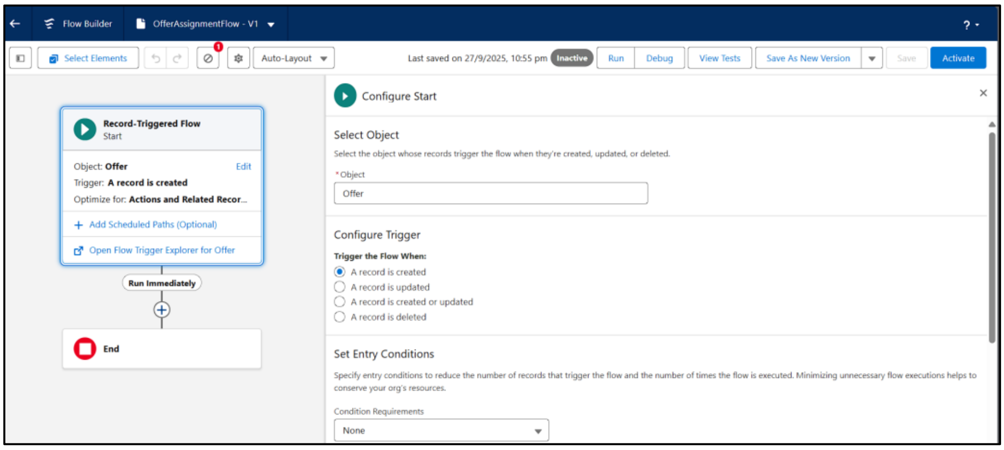
The Customer Loyalty Insights dashboard is a customizable interface designed to help retail teams monitor and analyze customer engagement across key touchpoints. It offers navigation to modules like Reports, Transactions, Purchases, and Loyalty Points, making it easy to access relevant data. The dashboard layout supports widget-based visualization, allowing users to add charts, tables, or KPIs tailored to their business goals. Although currently unpopulated, it provides a flexible foundation for tracking loyalty trends, customer feedback, and promotional effectiveness. With options to save and configure views, this dashboard empowers teams to make data-driven decisions and enhance customer retention strategies.



The **Customer Loyalty Insights** dashboard is designed to help retail teams monitor customer engagement and reward activity over time. Viewed in Historical mode, it provides a framework for tracking trends in loyalty points, purchases, feedback, and offers. Though currently empty, users can populate it with widgets to visualize KPIs, charts, and customer behavior metrics. The dashboard supports actions like refreshing data, editing layout, and subscribing for updates, making it a dynamic tool for ongoing analysis. With navigation access to related modules like Transactions and Feedbacks, it centralizes loyalty program performance in one intuitive interface.



The Create Record flow in Salesforce is designed to automate the creation of a new Feedback record immediately after a triggering event. It manually sets field values using variables such as {!Customer}, {!Rating}, and {!Comments}, ensuring that each feedback entry is accurately linked to the relevant customer and includes their input. This setup streamlines the feedback collection process, reduces manual data entry, and supports consistent data capture across the system. By using a record-triggered flow, it ensures timely creation of feedback records, which can be used for reporting, service improvement, or customer engagement analysis.



The OfferAssignmentFlow – V1 is a record-triggered flow in Salesforce designed to automate actions when a new Offer record is created. It begins with a trigger on the Offer object and runs immediately upon record creation. No entry conditions are set, meaning the flow activates for every new Offer. While the flow currently ends without additional logic, it provides a foundation for assigning offers to customers, updating related records, or launching notifications. This setup streamlines offer management and ensures consistent handling of promotional data. Once activated and expanded, it can support personalized marketing and operational efficiency.