



Korišćenje Salesforce tehnologija za unapređivanje, automatizaciju i optimizovanje modernih poslovnih sistema

Predmet: Napredno softversko inženjerstvo

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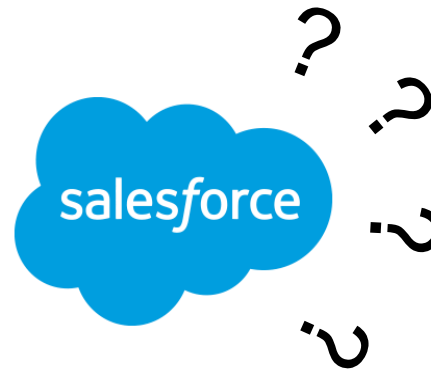
Broj indeksa: 1925



Sadržaj

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Šta je to

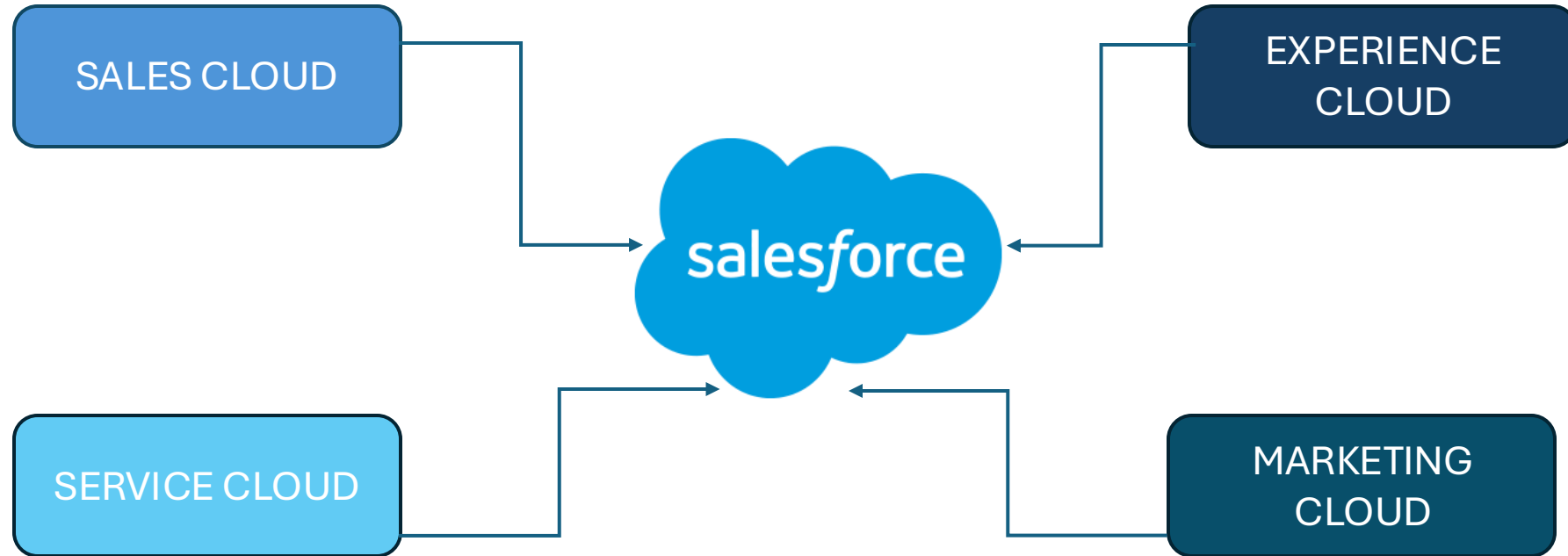


Salesforce je vodeća **cloud** platforma za upravljanje odnosima sa korisnicima (**CRM**).





Koristi ga **preko 150.000** kompanija širom sveta, uključujući i velike brendove poput Coca-Cole i Amazona.

Pored osnovnog CRM-a, nudi alate za automatizaciju, izveštavanje, razvoj aplikacija i rad sa **veštačkom inteligencijom**.





Podela Salesforce Cloud-a







SALES CLOUD

-  *Lead & Opportunity Management* – praćenje potencijalnih i aktivnih prodaja
-  *Einstein for Sales* – AI preporuke za sledeće korake u prodajnom ciklusu
-  *Activity Timeline & Tasks* – organizacija sastanaka, mejlova i follow-up-a
-  *Sales Forecasting* – planiranje i analiza prodajnih performansi





SERVICE CLOUD

-  *Case Management* – evidencija i obrada korisničkih zahteva i problema
-  *Einstein Bots & AI Answers* – automatski odgovori i chatbot podrška
-  *Omni-Channel Routing* – inteligentna raspodela zahteva agentima
-  *Knowledge Base* – baza rešenja i članaka dostupna agentima i korisnicima

EXPERIENCE CLOUD

-  *Community Portals* – pravljenje web portala za korisnike, partnere ili zaposlene
-  *Drag-and-drop Page Builder* – vizuelno uređivanje portala bez koda
-  *Personalizacija i kontrola pristupa* – različiti sadržaji za različite korisnike
-  *Integracija sa CRM podacima* – prikaz podataka u realnom vremenu iz Salesforce baze

MARKETING CLOUD

-  *Email Studio* – kreiranje i slanje personalizovanih kampanja
-  *Journey Builder* – automatizacija korisničkog putovanja (customer journey)
-  *Mobile Studio* – slanje poruka i kampanja putem SMS-a i mobilnih kanala
-  *Einstein Engagement Scoring* – AI analiza angažovanosti korisnika



Search Setup



Setup

Home

Object Manager ▾

Quick Find

Setup Home

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS



SETUP

Home

Create ▾

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Join the Trailblazer Community

Get help, learn and collaborate with fellow customers. ⬆

Join Now

Most Recently Used

5 items

NAME

TYPE

OBJECT

[Aleksa Markovic](#)

User

[Contact Record Page](#)

Lightning Page

[Contact Layout](#)

Page Layout

Contact

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

More

Leads

My Leads

New

List View

Created

This Quarter

Owner

Me

Total Leads

22

No Activity

22

Idle

0

No Upcoming

0

Overdue

0

Due Today

0

Upcoming

0

22 items • Filtered by Created Date, Me, Total Leads

Add to Campaign

Change Status

Change Owner

Send List Email

Assign Label

	<div><input type="checkbox"/></div> Name	<div></div> Title	<div><input type="checkbox"/></div> Company	<div><input type="checkbox"/></div> Lead Status	<div><input type="checkbox"/></div> Lead Source	<div><input type="checkbox"/></div> Last Activity	Actions
1	<div><input type="checkbox"/></div> Bertha Boxer	<div></div> Director of Vendor Relations	Farmers Coop. of Florida	Working - Contacted	Web		<div></div> <div></div> <div></div>
2	<div><input type="checkbox"/></div> Phyllis Cotton	<div></div> CFO	Abbott Insurance	Open - Not Contacted	Web		<div></div> <div></div> <div></div>
3	<div><input type="checkbox"/></div> Jeff Glimpse	<div></div> SVP, Procurement	Jackson Controls	Open - Not Contacted	Phone Inquiry		<div></div> <div></div> <div></div>
4	<div><input type="checkbox"/></div> Mike Braund	<div></div> VP, Technology	Metropolitan Health Services	Open - Not Contacted	Purchased List		<div></div> <div></div> <div></div>
5	<div><input type="checkbox"/></div> Patricia Feager	<div></div> CEO	International Shipping Co.	Working - Contacted	Partner Referral		<div></div> <div></div> <div></div>
6	<div><input type="checkbox"/></div> Brenda McClure	<div></div> CFO	Cadinal Inc.	Working - Contacted	Web		<div></div> <div></div> <div></div>
7	<div><input type="checkbox"/></div> Violet Macleod	<div></div> VP, Finance	Emerson Transport	Working - Contacted	Phone Inquiry		<div></div> <div></div> <div></div>

Lead

Ms. Bertha Boxer

+ Follow

New Case

New Note

Submit for Approval

▾

Title

Director of Vendor Relations

Company

Farmers Coop. of Florida

Phone (2) ▾

(850) 644-4200

Email

bertha@fcof.net

✓

Working - Contacted

Closed - Not Converted

Converted


✓ Mark Status as Complete


Activity

Details

Chatter


Lead Owner

 [Aleksa Markovic](#)




Name

Ms. Bertha Boxer




Company

Farmers Coop. of Florida




Title

Director of Vendor Relations




Lead Source

Web




Phone

(850) 644-4200




Mobile




Fax

(850) 644-4300




Email


bertha@fcof.net




Website



Related

 **We found no potential duplicates of this Lead.**

 **Campaign History (0)**

▾

Components

Fields

🔍 Search...

⚙ ▾

▼ Standard (45)

📄 Accordion

⚡ Action Launcher

⚙ Actions & Recommendations

📅 Activities

📋 Approval Trace

🔔 Automated Action Reminders

💬 Chatter

🗨 Chatter Feed

⚡ Chatter Publisher

📊 CRM Analytics Collection

📊 CRM Analytics Dashboard

📋 Dynamic Related List - Single

🌱 Einstein Next Best Action

👤 Einstein Predictions

Lead

Ms. Bertha Boxer

+ Follow

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Phone (2) ▾

Email

Director of Vendor Relations

Farmers Coop. of Florida

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bertha@fcof.net

✓

Working - Contacted

Closed - Not Converted

Converted

✓ Mark Status as Complete

Activity

Details

Chatter

New Task ▾

📞 Log a Call ▾

📅 New Event ▾

✉ Email ▾

Filters: All time • All activities • All types ⚙

Refresh • Expand All • View All

▼ Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Related

🚶 We found no potential duplicates of this Lead.

🎯 Campaign History (0) ▾

Page

* Label

Lead Record Page

* API Name

Lead_Record_Page

* Page Type

Record Page

Object

Lead

Template

Header, Subheader, Right Sid...

Change

Description

Get more on the AppExchange

organizer

SETUP > OBJECT MANAGER

Lead

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Rules

Fields & Relationships

30+ Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Map Lead Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address	Address		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
Clean Status	CleanStatus	Picklist		✓
Company	Company	Text(255)		✓
Company D-U-N-S Number	CompanyDunsNumber	Text(9)		
Created By	CreatedById	Lookup(User)		
Current Generator(s)	CurrentGenerators__c	Text(100)		
D&B Company	DandbCompanyId	Lookup(D&B Company)		✓
Data.com Key	Jigsaw	Text(20)		
Description	Description	Long Text Area(32000)		
Do Not Call	DoNotCall	Checkbox		



Osnovne tehnologije



Apex



SOQL / SOSL



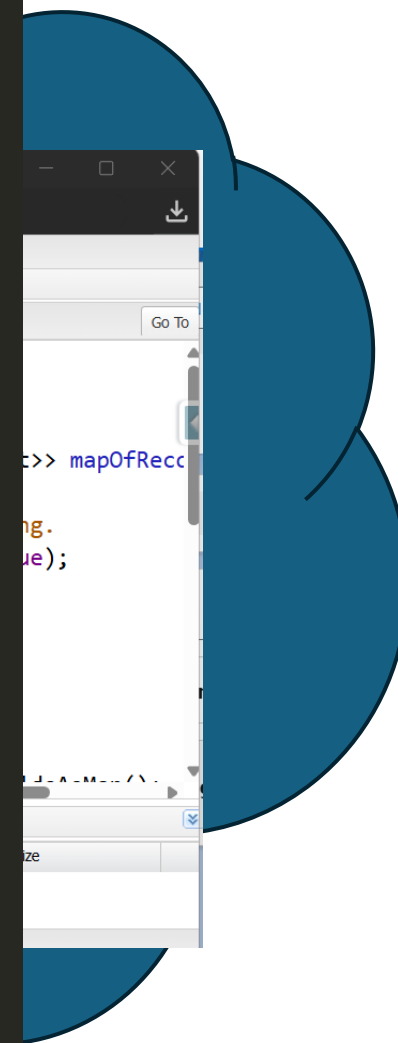
**Lightning Web
Components (LWC)**



Flow

- Objektno sličan Javu
- Koristi se logike, trigger koda.
- Idealno za koju nije implementiran
- Radi unutar platforme sigurnosno

```
public class AccountClassifier {  
  
    public class AccountStatus {  
        public String accountName;  
        public Integer contactCount;  
        public String classification;  
  
        public AccountStatus(String name, Integer count, String classification) {  
            this.accountName = name;  
            this.contactCount = count;  
            this.classification = classification;  
        }  
    }  
  
    public static List<AccountStatus> classifyAccounts() {  
        List<AccountStatus> results = new List<AccountStatus>();  
  
        // Dohvati sve naloge sa pripadajućim kontaktima  
        List<Account> accounts = [SELECT Id, Name, (SELECT Id FROM Contacts) FROM Account];  
  
        for (Account acc : accounts) {  
            Integer contactCount = acc.Contacts.size();  
            String classification;  
  
            if (contactCount >= 10) {  
                classification = 'Key Account';  
            } else if (contactCount >= 5) {  
                classification = 'Standard';  
            } else {  
                classification = 'Small';  
            }  
  
            results.add(new AccountStatus(acc.Name, contactCount, classification));  
        }  
  
        return results;  
    }  
}
```





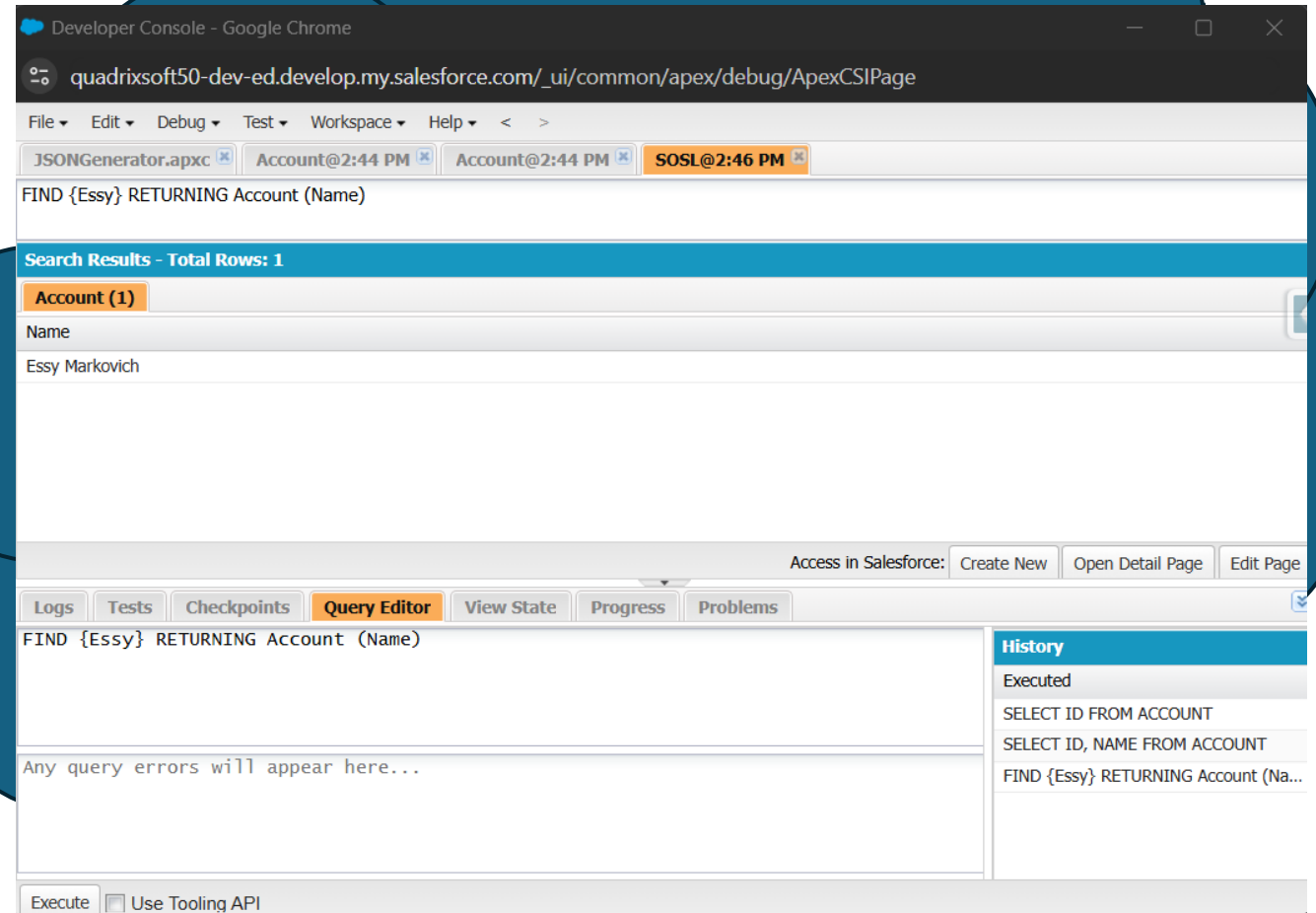
Vrste Apex trigger događaja:

- **before insert** – pre nego što se novi rekord upiše u bazu
- **before update** – pre nego što se postojeći rekord ažurira
- **before delete** – pre nego što se rekord obriše
- **after insert** – nakon što se novi rekord upiše u bazu
- **after update** – nakon što se rekord ažurira
- **after delete** – nakon što se rekord obriše
- **after undelete** – kada se rekord "vrati" iz Recycle Bin-a

```
trigger SetDefaultTaskStatus on Task (before insert) {  
    for (Task t : Trigger.new) {  
        if (t.Status == null) {  
            t.Status = 'Not Started';  
        }  
    }  
}
```

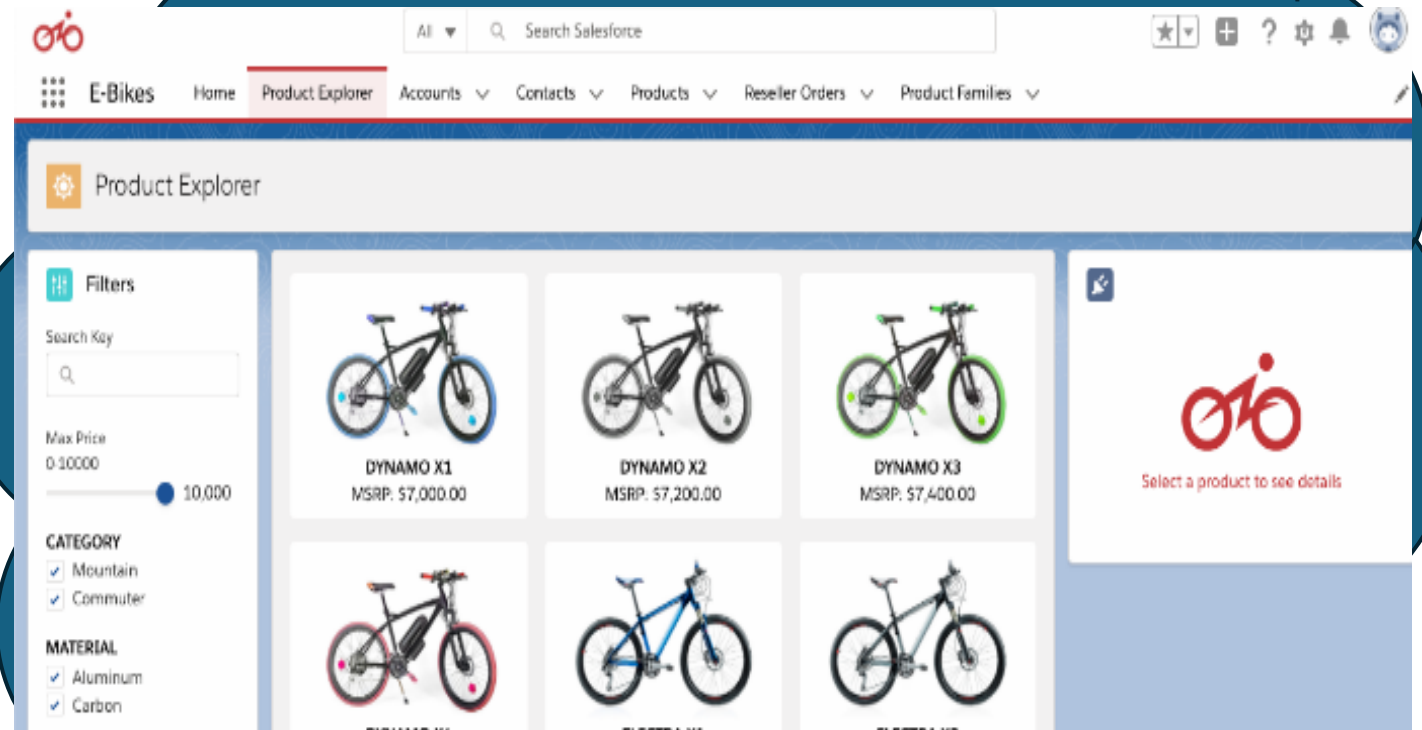
SOQL / SOSL

- SOQL (*Salesforce Object Query Language*) za prikupljanje podataka iz baze
- SOSL (*Salesforce Object Search Language*) za pretragu teksta kroz više objekata
- Koristi se u Apex-u, Flow-u i Developer Console-u
- Omogućava efikasnu manipulaciju podacima bez direktnog SQL pristupa



⚡ Lightning Web Components (LWC)

- Framework za kreiranje komponenata unutar Salesforce-a, konceptualno sličan React-u
- Koristi se za pravljenje brzih, responsive korisničkih interfejsa
- Radi unutar Lightning Experience i mobilnih aplikacija
- Podržava integraciju sa Apex-om i Flow-om





- Alat za vizuelno kreiranje poslovnih procesa (no-code/low-code)
- Koristi se za automatizaciju, validaciju i upis podataka
- Zamena za jednostavne trigger-e i skripte
- Pristupačan i korisnicima bez programerskog znanja

