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| **Reference** | | | | |
| Reference | Version : | Language: | Application date : | Date of review : |
|  | V0.1 |  | 2023/12/04 | AAAA/MM/JJ |
| State : | Sending function : | | Sending department : | |
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| Ver. | Date | Modified by | Checked by | Approved by | Revision object |
| V0.1 | 2023/12/04 |  |  |  |  |
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| **Object** | |
| Object: | Customizing guide Salesforce |
| Attachment process: |  |
| Recipient: |  |

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| **Signatories** | | | |
|  | Written by | Checked by | Approved by |
| Name | Dyhia AMER |  |  |
| Function |  |  |  |
| Date | 2023/12/04 | AAAA/MM/JJ | AAAA/MM/JJ |
| Sign |  |  |  |

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| Accessibility | | | |
| ~~Public~~ | Internal | ~~Confidential~~ | ~~Restricted~~ |

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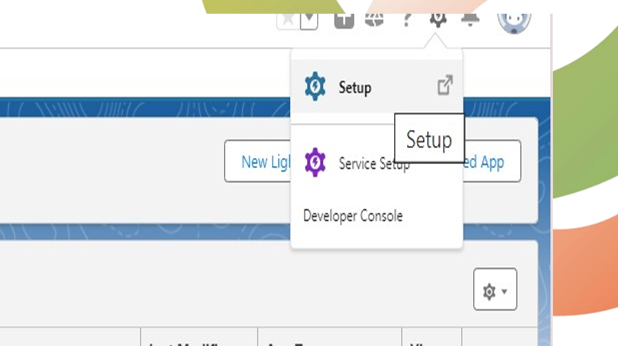
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**Salesforce is the most widely used customer relationship management platform in the world. It is used to improve collaboration between teams and to better understand customer expectations.**

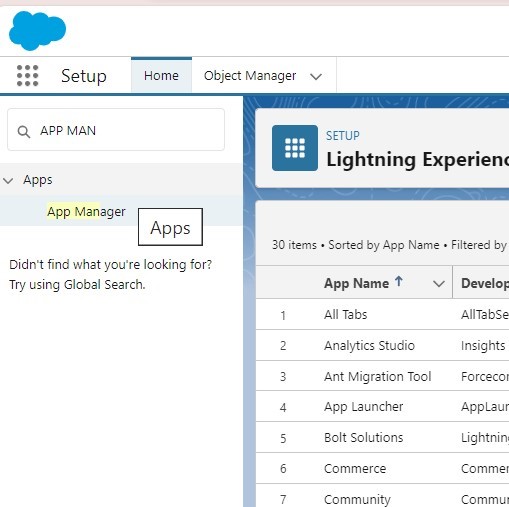
# 1. Create an application for Ekovya

Ekovya can centralize the information needed in an application customized in order to manage its business.

* To do so, we created Ekovya application through **Setup** button.



* From the **quick finder**: enter App Manager and then select **App Managers**.



* Click **new Lightning App** to walk through the **Lightning App Wizard**.

A screenshot of a computer

Description automatically generated

* Fill the **fields** required to customize the application and click **next**.

A screenshot of a computer

Description automatically generated

* Select the options needed click **next**.

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* Click **next** again

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* Add the **items** needed and click **next**.

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Description automatically generated

* Select **profiles** to assign to users.
* Use the arrow logo to move the items
* Click **Save and Finish** to exit the wizard.

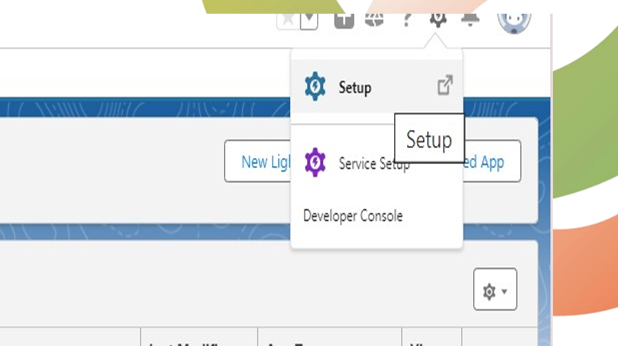
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# 2. Customize the ACCOUNT object

## 1. Type field customization

* From **Setup**, Select the **Object Manager**, select **Account**, then **Fields & Relationships**, then select **Type** to customize the picklist of Ekovya's categories.



## 2. Set the Type picklist field to meet this request

* **Deactivate** the standard values
* Create new customised values with the categories described above and click **save**.

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Ekovya classifies the Accounts according to these values

* A-Account
* B-Account
* C-Account

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Description automatically generated

3. Make it mandatory

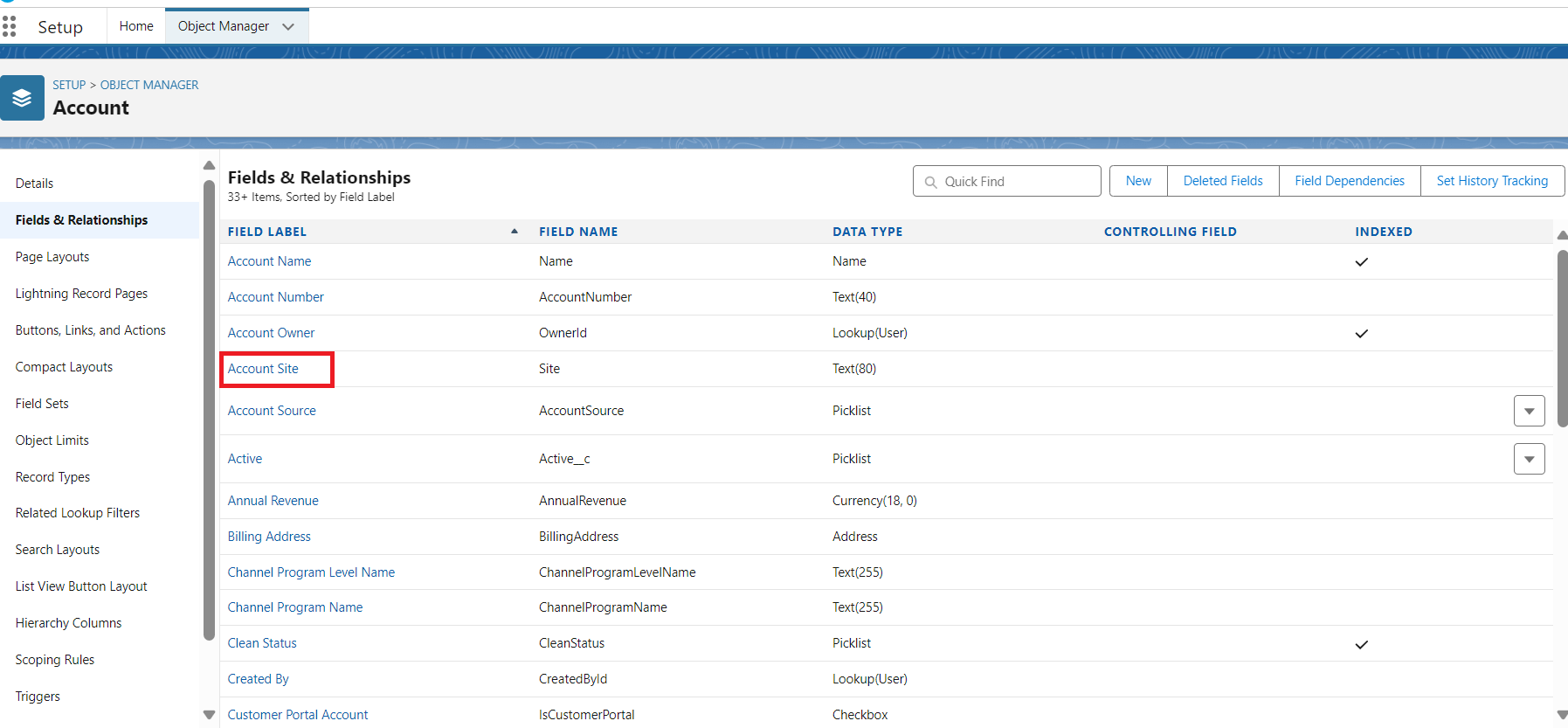
* **Field Type** is a standard field which is not required when creating a new account.
* Use the Account Page Layout to turn it into “Required”

A screenshot of a computer

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## 4. Remove Parent Account field and Account site

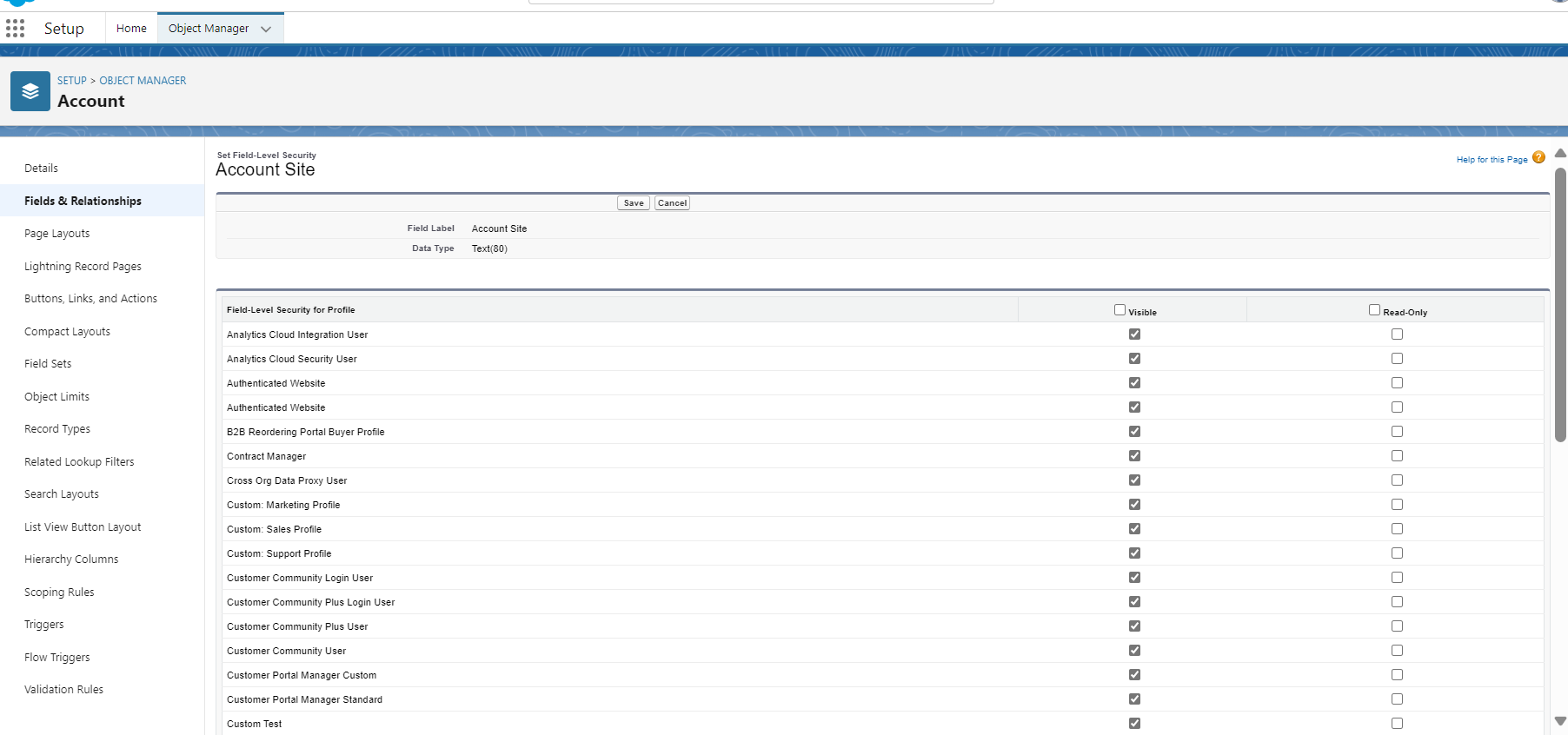
* Parent account field and account site are standard fields that cannot be removed from the Page Layout.
* Click on “Account Site”



* To get them hidden from the user, set the **field-level security** and uncheck the visible checkbox for everyone.

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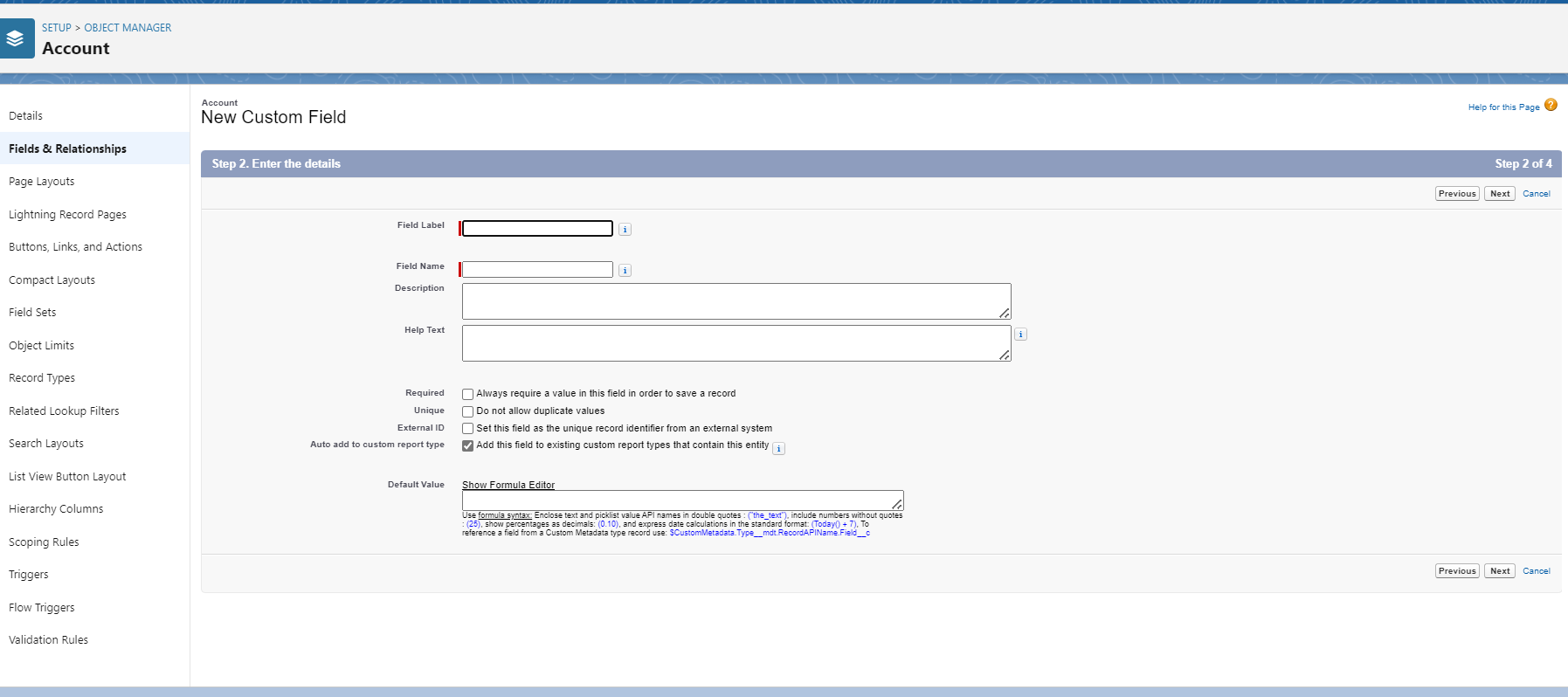
5. Create a company email field

* From **Setup**, Select the **Object Manager**, select **Account**, then **Fields & Relationships**, then **New**

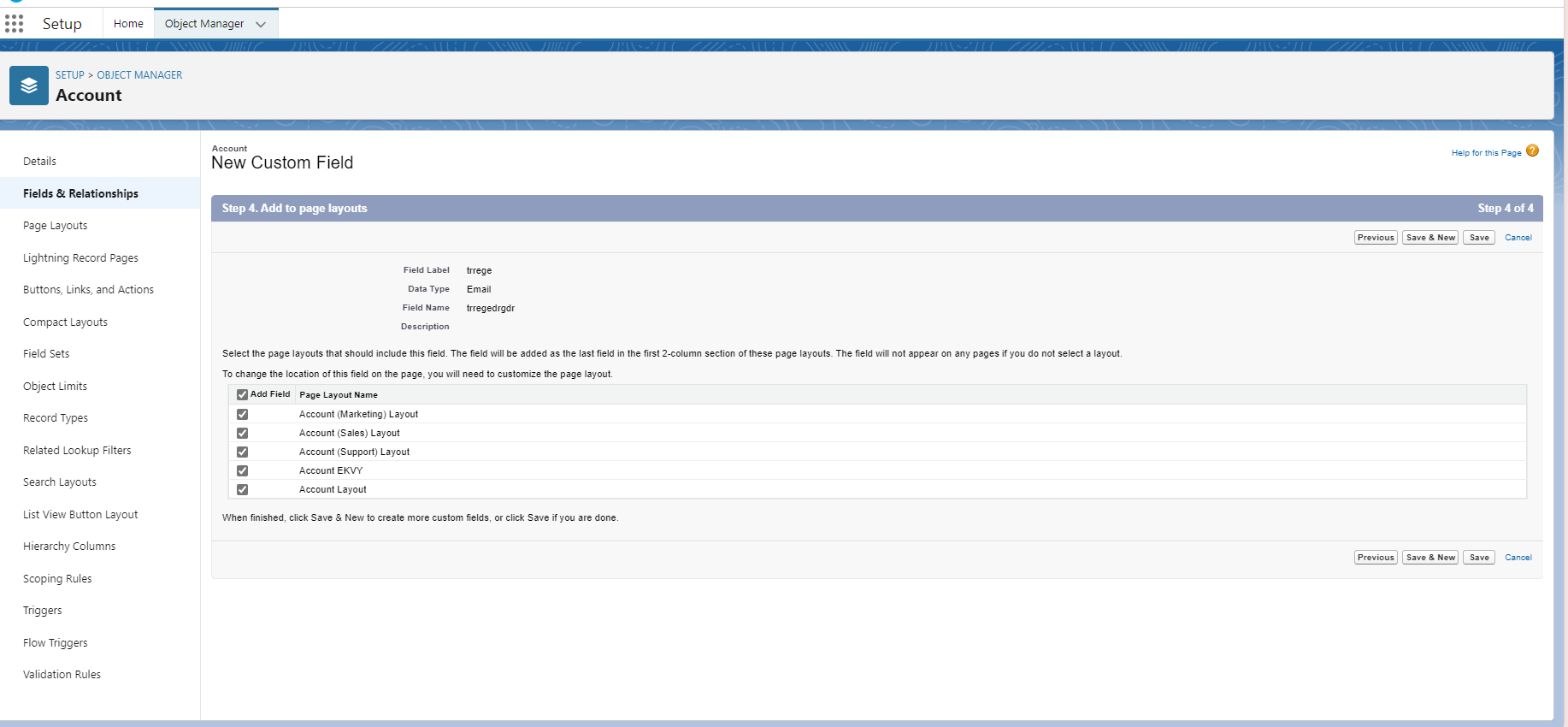
A screenshot of a computer

Description automatically generated

* Create a new field with these settings
* Field type: email
* Field Label: Company Email
* Field Name
* Description

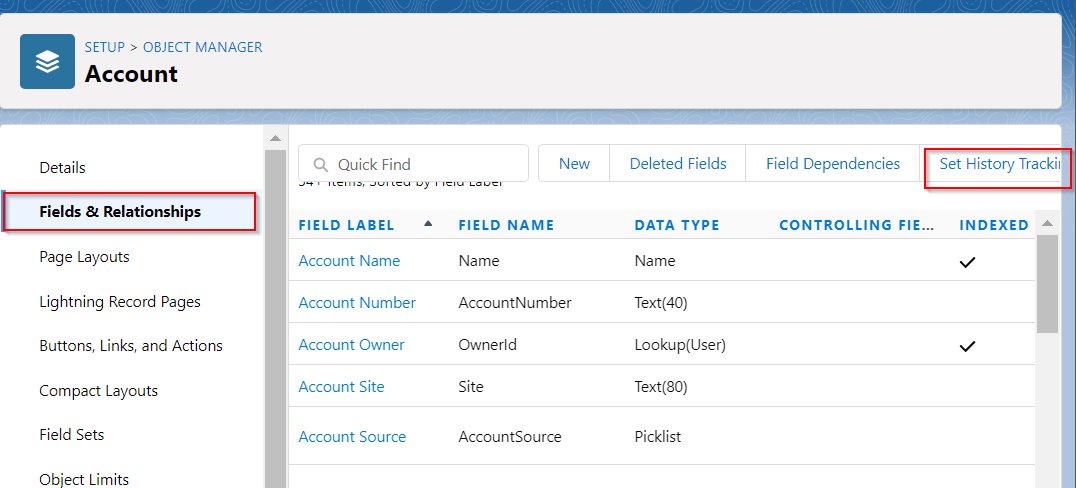


* Click **Next**, then **Next**, then **Save**



## 6. Rating Field tracking

* Track the Rating field so that users can have a follow-up of the different updates for this particular field.



* Tracking in the Account History related list
* Enable Account History

A screenshot of a account history

Description automatically generated

* From the **Setup**, select the **Feed Tracking** in the **quick find box**
* Enable Tracking in the Chatter feed

A screenshot of a computer

Description automatically generated

## 7. Create a SIRET Field and remove SIC Code field

* Create **Siret Field** with these settings
* Field type: Number
* Field Label: Siret
* Length: 14

A screenshot of a computer

Description automatically generated

* Remove **SIC Code** field in the **Account Page Layout**
* **Object manager** > **Account** > **Page Layouts** > **Account Page Layout**

A screenshot of a computer

Description automatically generated

## 8. Create an account Currency field

* Create a new **field picklist** data type

A screenshot of a computer

Description automatically generated

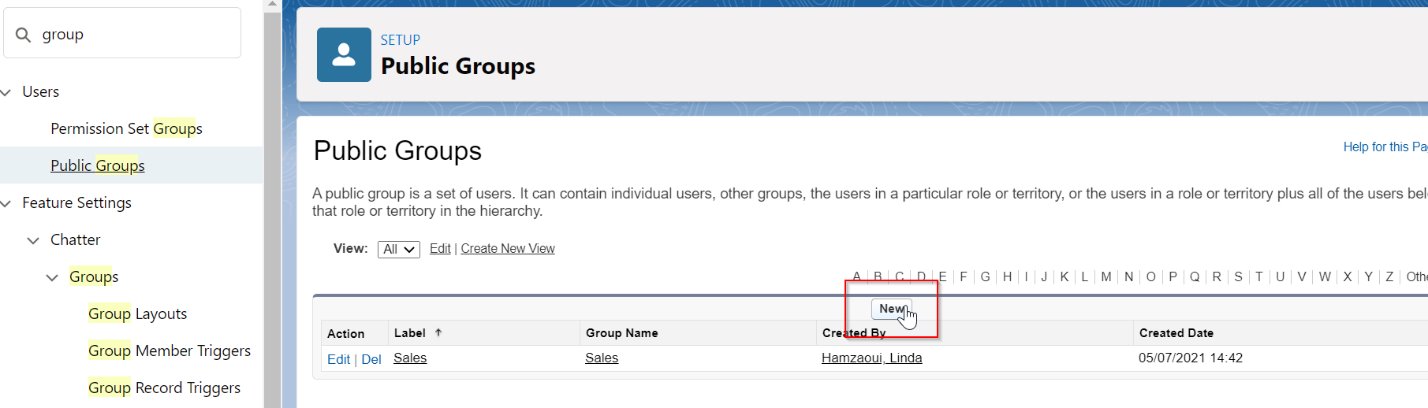
* Enter the value and **save**

A screenshot of a computer

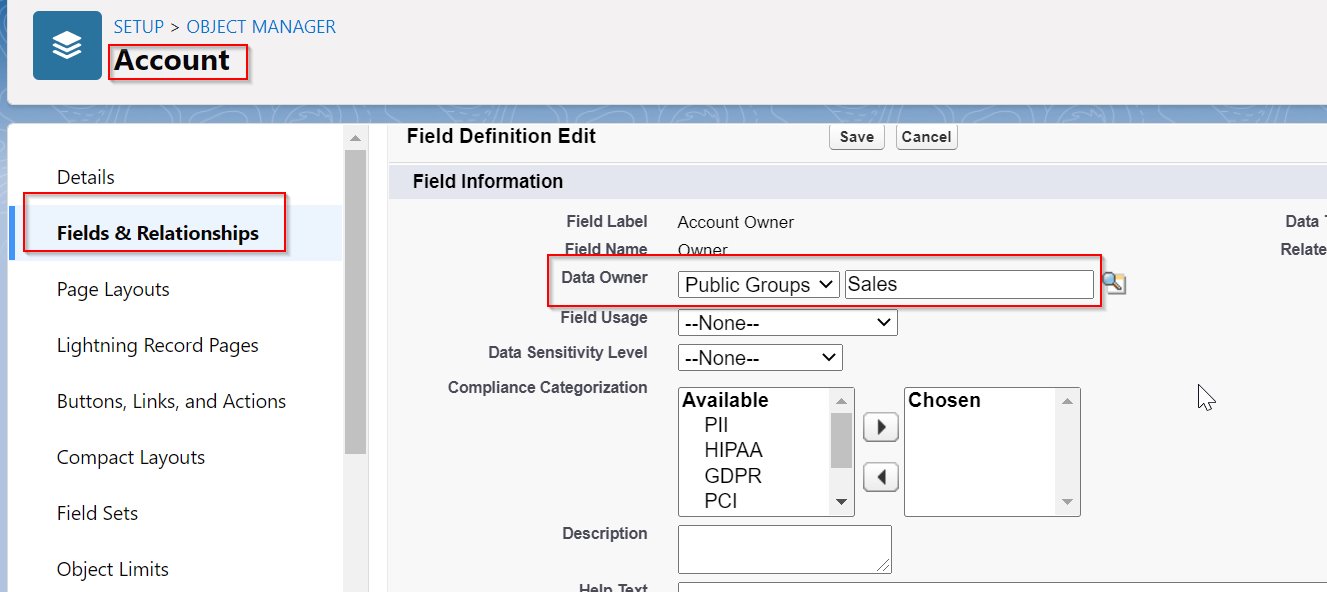
Description automatically generated

9. Account Owner “Sales”

* Create a group public called “Sales” for all the users
* Select **Public Groups** in the quick find box
* Select “New”



* Change the data owner of the account owner field



# 3. Customizing the CONTACT object

## 1. Account field must be mandatory

## Account field is a standard object.

## Go to the Contact Page Layout to set this specific field into Required. Object Manager > Contact > Page Layout > Contact Page Layout > Fields.

## Account Name Field is set to « Required ».

A screenshot of a computer

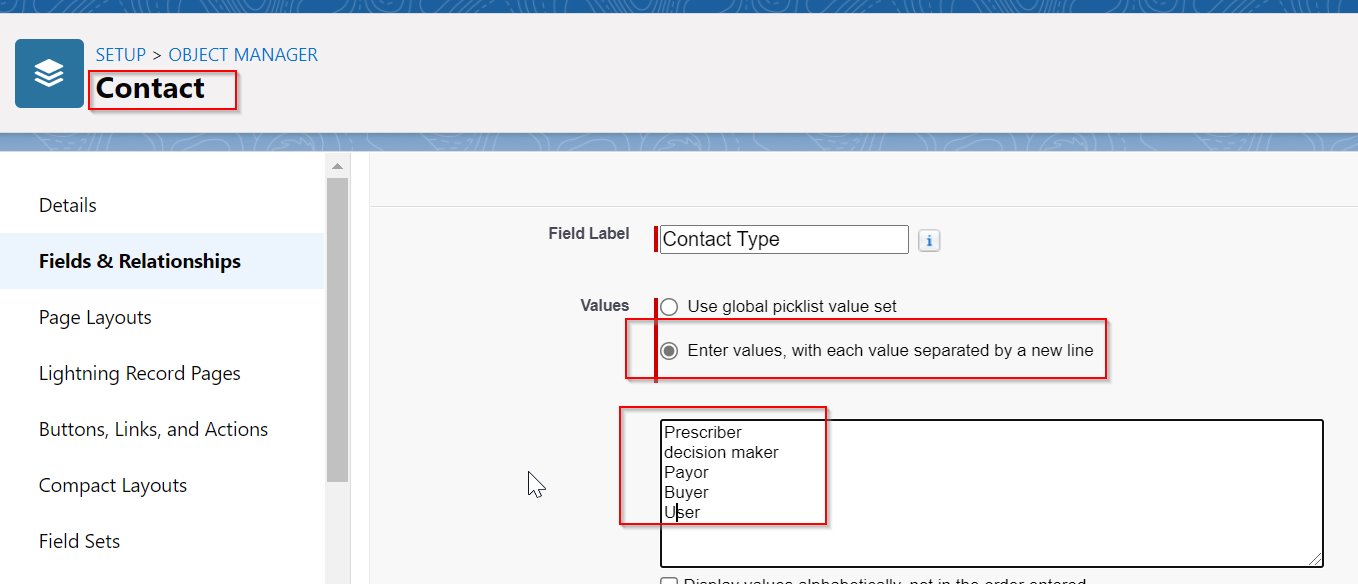
Description automatically generated

* Those fields are removed from the Page Layout:
* Home Phone
* Fax
* Assistant, Assistant Phone
* Other Address
* Level

A screenshot of a computer

Description automatically generated

* Add a field contact type
* Create a new field picklist data type
* Enter the value



## 2. Remove some standard fields

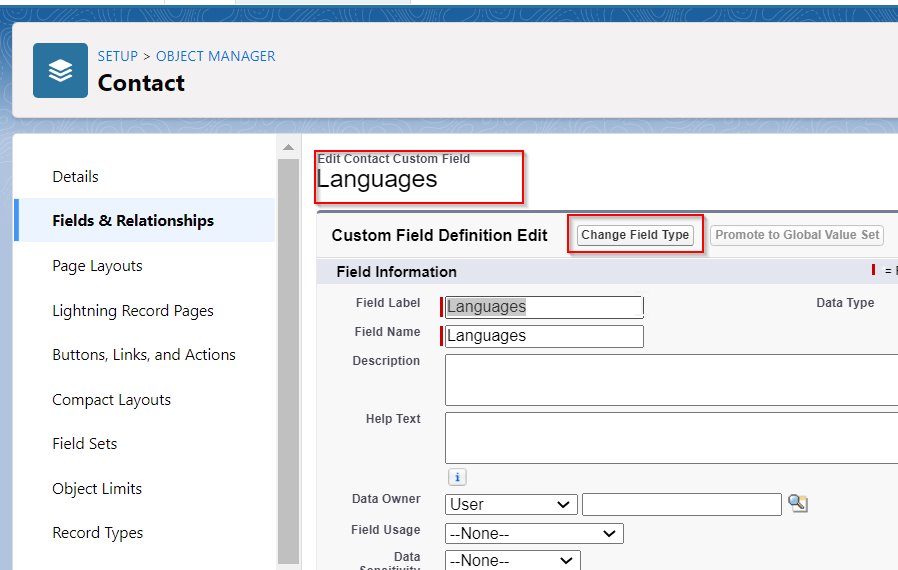
* The currency field, home phone field, fax field, assistant field, assistant phone field, other address field, level field are standard fields that cannot be removed from the Page Layout.
* To get them hidden from the user, set the **field-level security** and uncheck the visible checkbox for everyone.

A screenshot of a contact field

Description automatically generated

## 3. Change the type of the Languages Field into a picklist field

* Users could be able to choose between mutliple languages :
* English
* French
* Arabic
* Russian



## 4. Change the type of the value into Picklist

* Set the values of the picklist with the languages listed above
* Choose **Enter values, with each value separated by a new line**
* Enter the values

A screenshot of a computer

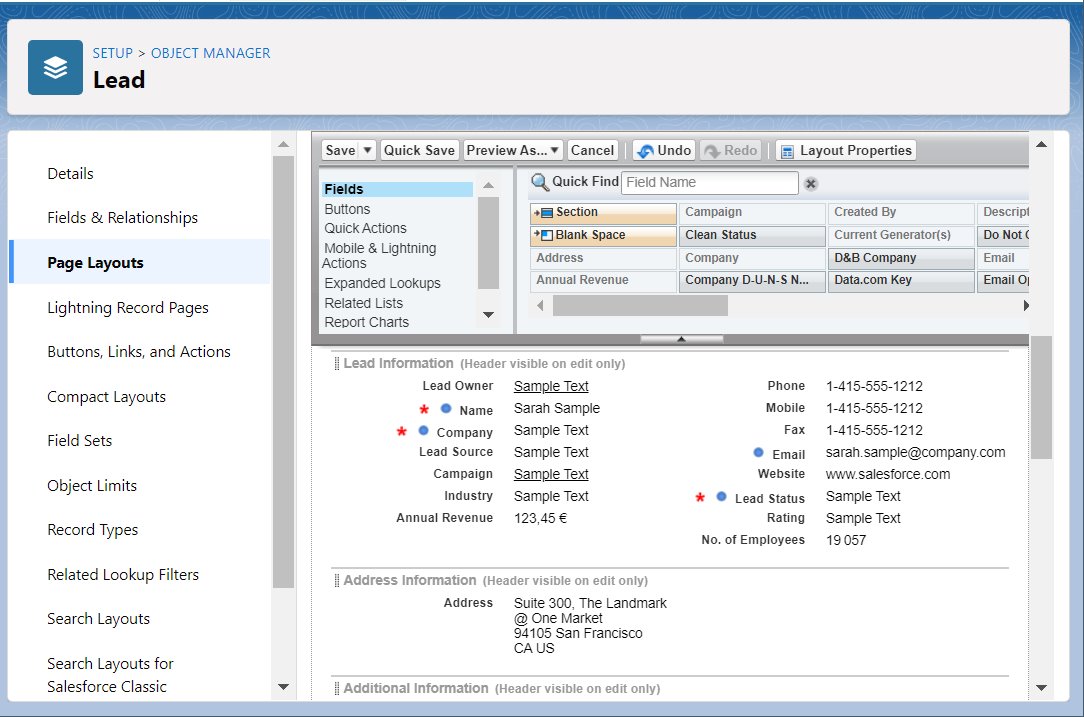
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# 4. Customizing the LEAD object

## 1. Remove Title field

Go to Object Manager > Lead > Page Layout > Lead Page Layout

Field removed from the Page Layout : Title



## 2. Add the company email

* Create a new field called « Lead Company E-mail »
* Field type : email
* Field Label: Lead Company E-mail
* Field-level security: visible for all profiles
* Add field to all page layouts

A screenshot of a computer

Description automatically generated

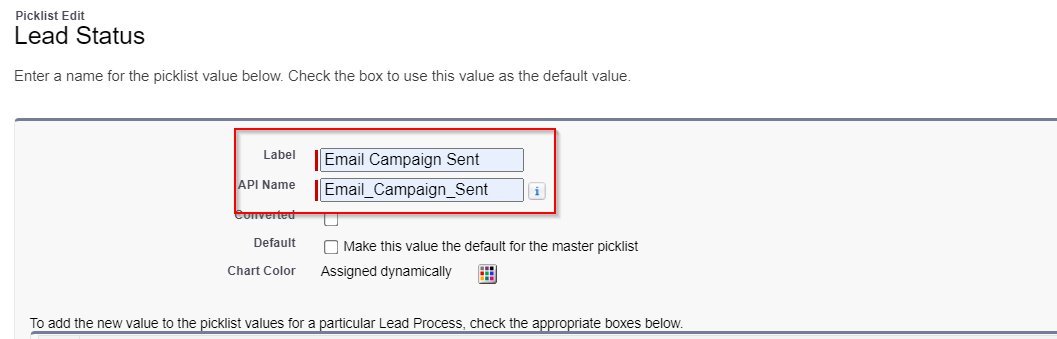
8. Set the Lead Process including the stage « Email Campaign Sent »

Edit the standard Lead Status field :



## 3. Create a new picklist value

* Label : Email Campaign Sent



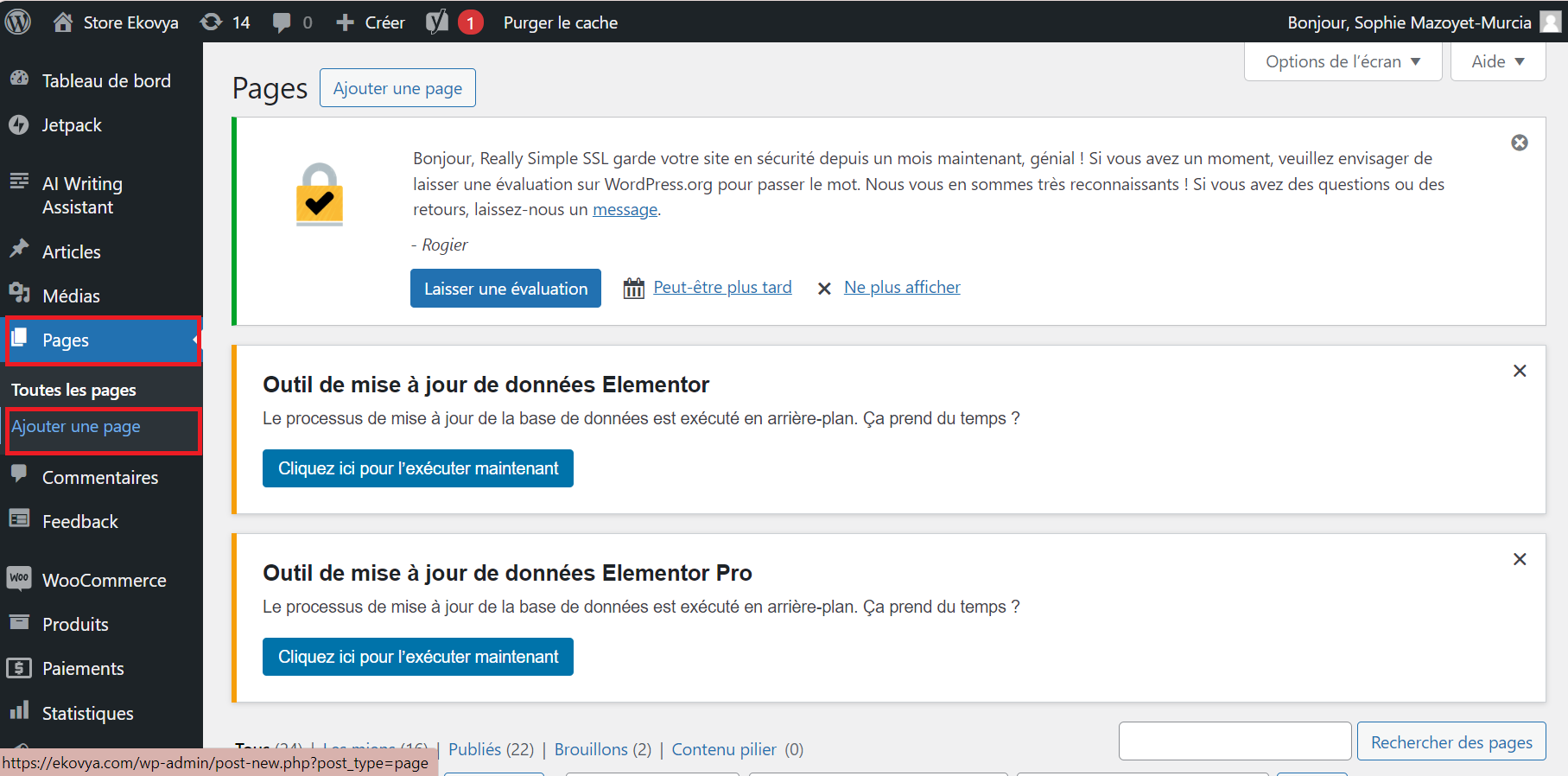
* Reorder the picklist value as below :
* Open – Not contacted
* Email Campaign Sent
* Working – Contacted
* Closed – Converted
* Closed – Not Converted

# 6. Sales Cloud implementation

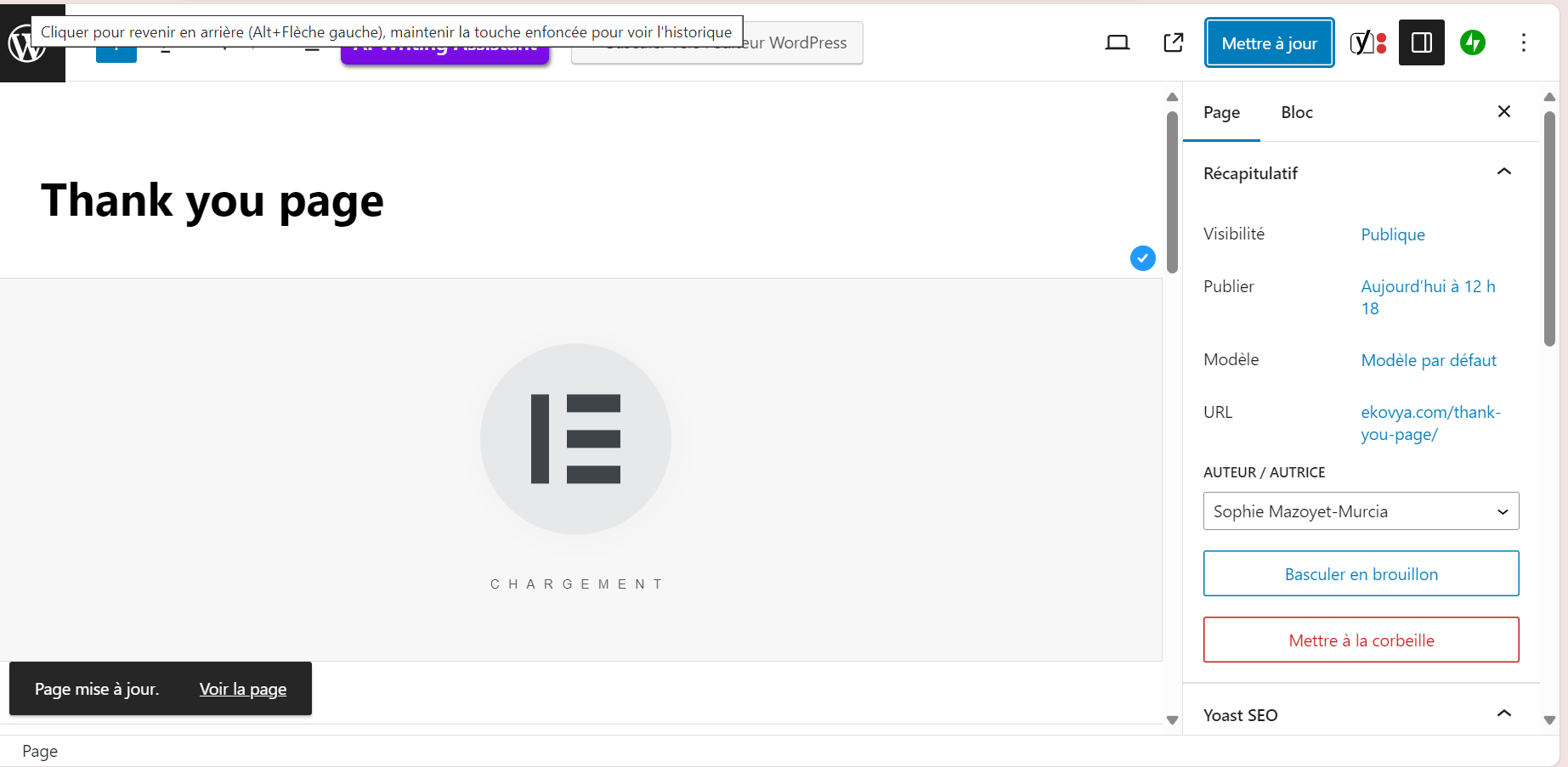
**Set up a Web-to-lead form in Wordpress to gather leads.**

## 1. Create thank you page in Wordpress

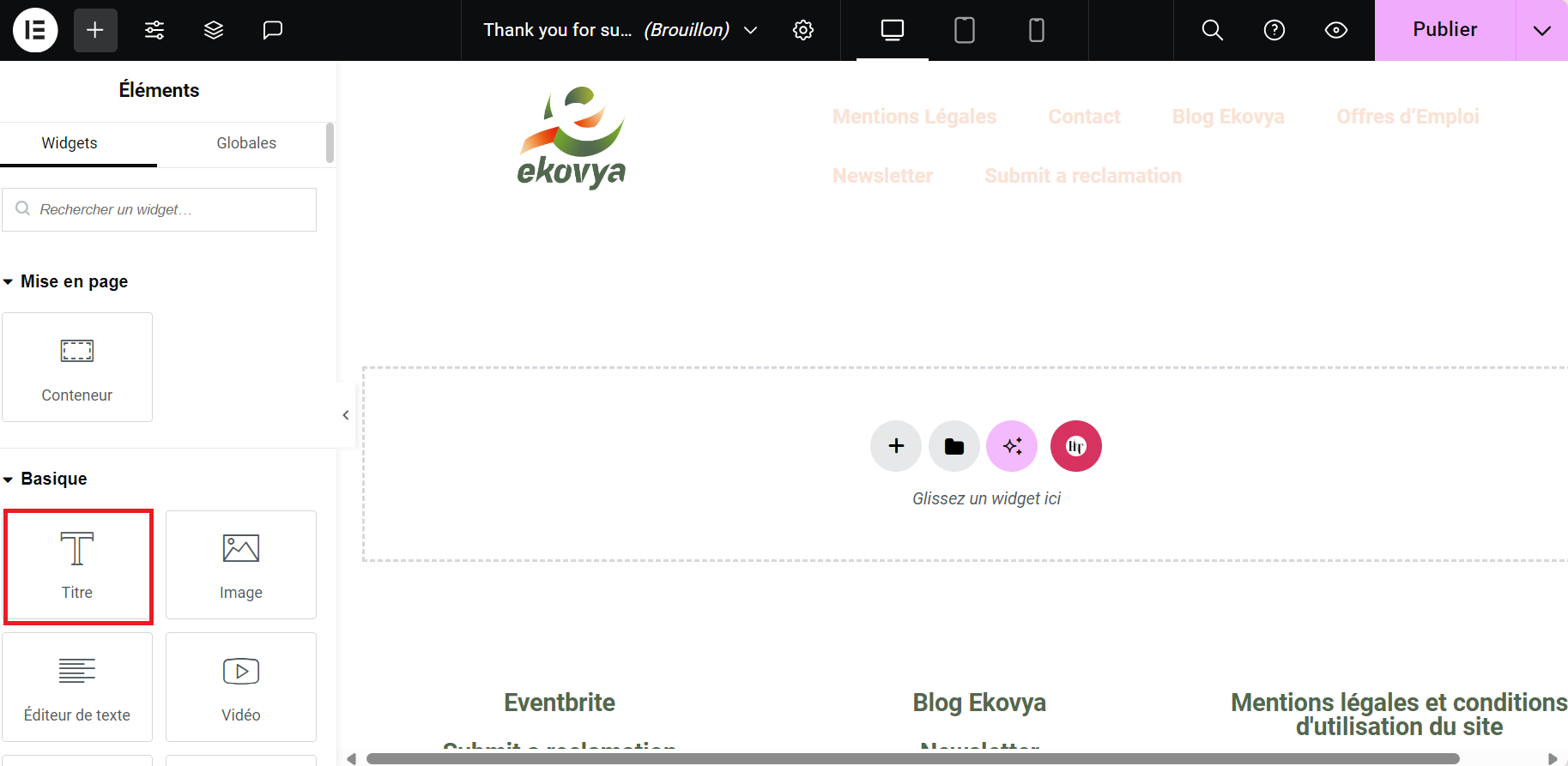
* From the Home page in Wordpress, add a new page



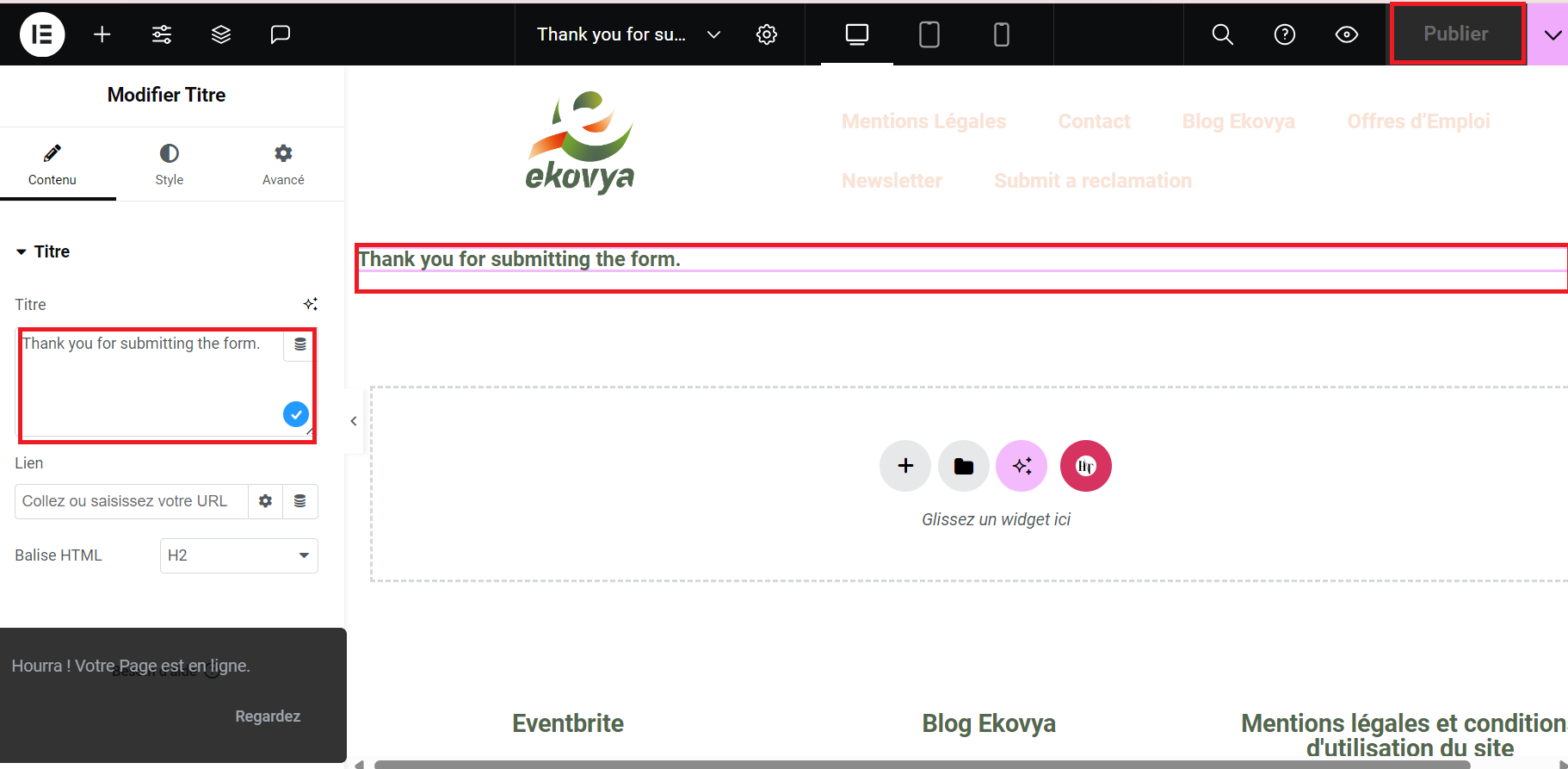
* Give a title to your thank you page



* Click on the Title in the Widgets function



* Write your texte in the box

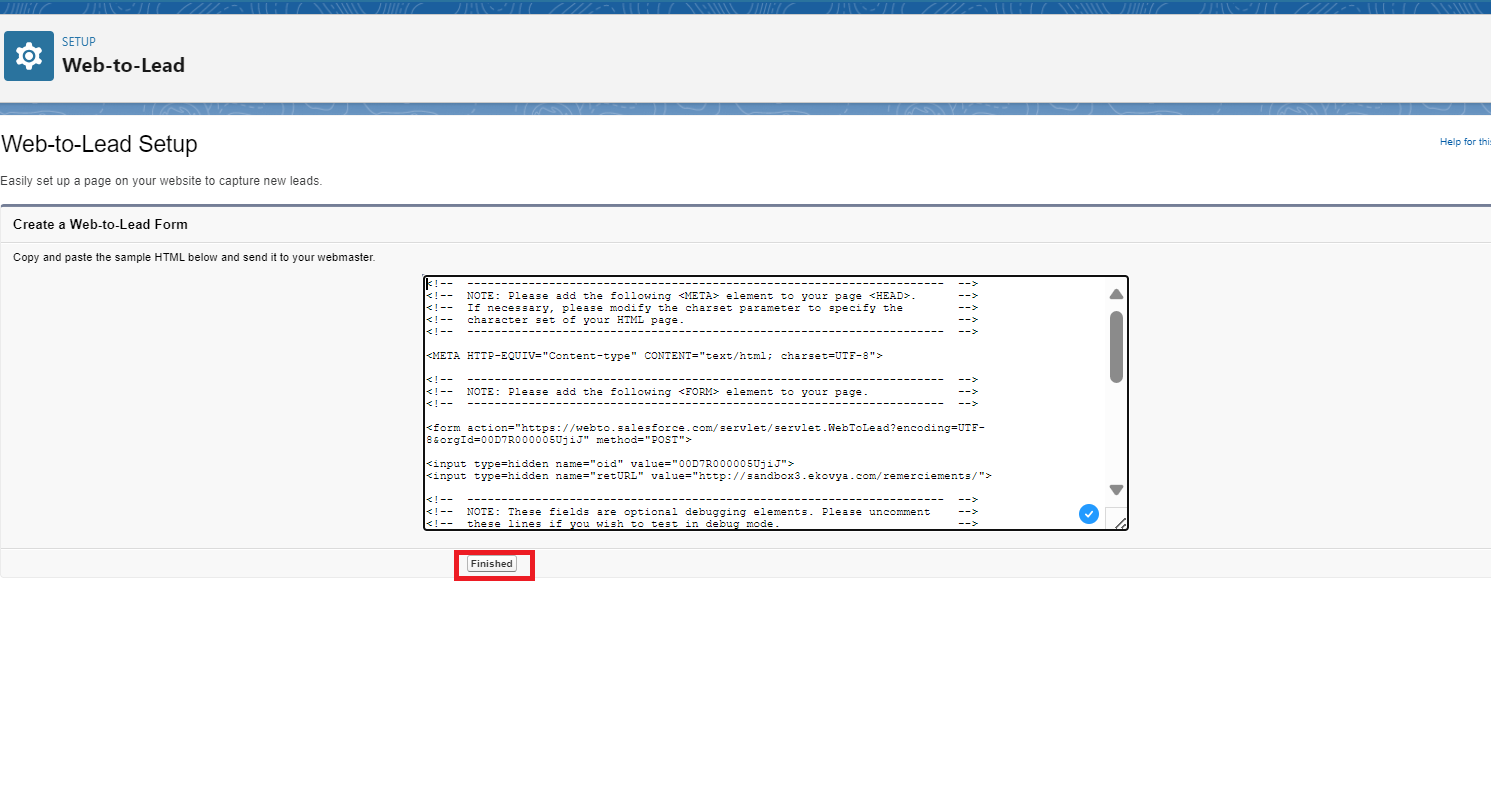


## 2. Create Web-to-Lead form

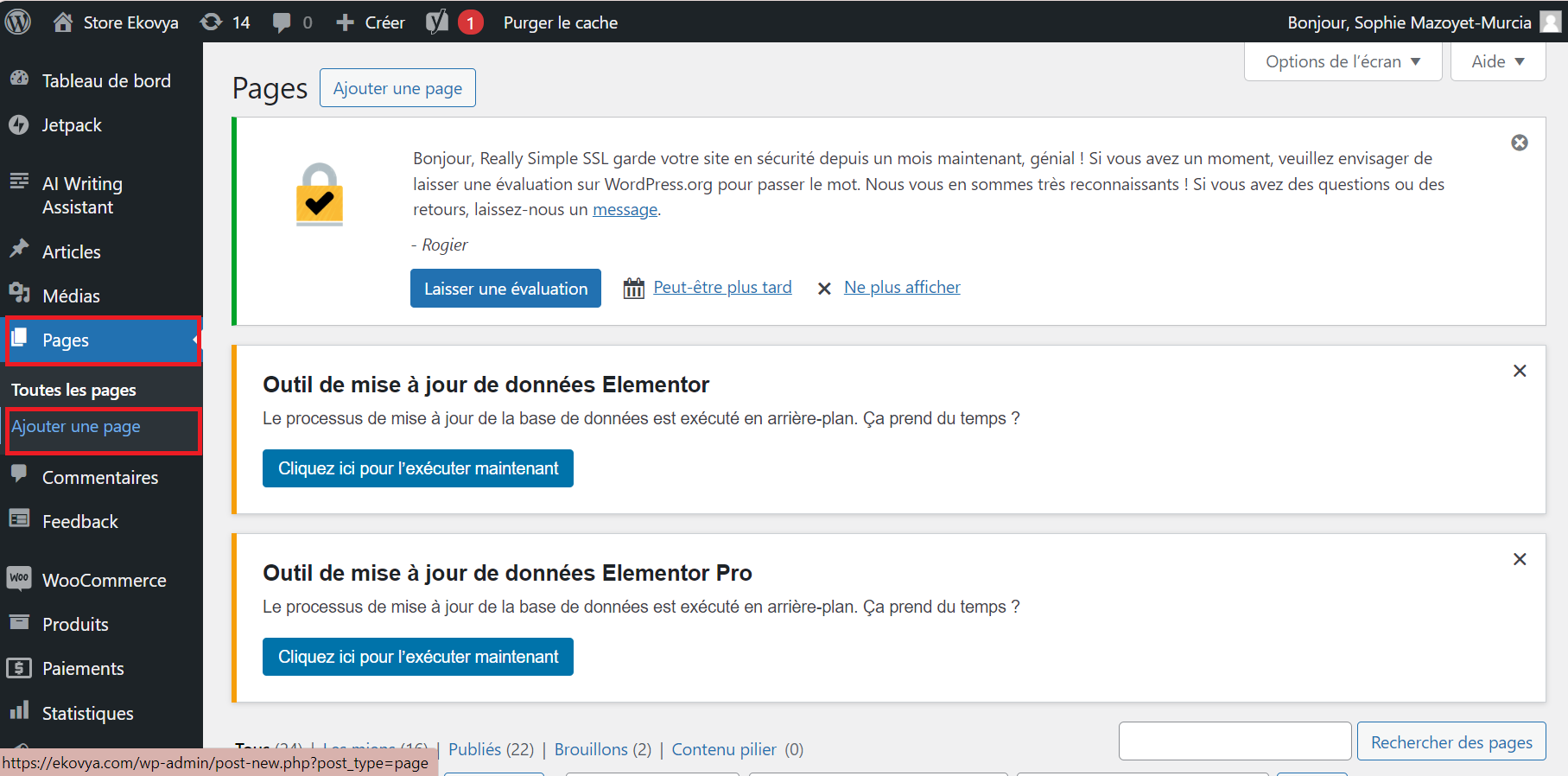
* Go to the **Setup** page, from the **quick finder** enter **Web-to-lead** and select **Web-to-lead**
* Click “Create Web-to-Lead Form
* Use the arrow logo to move the items that you need from the left to the right and enter the site address and click on generate



* When the sample HTML is created, copy and click on Finished



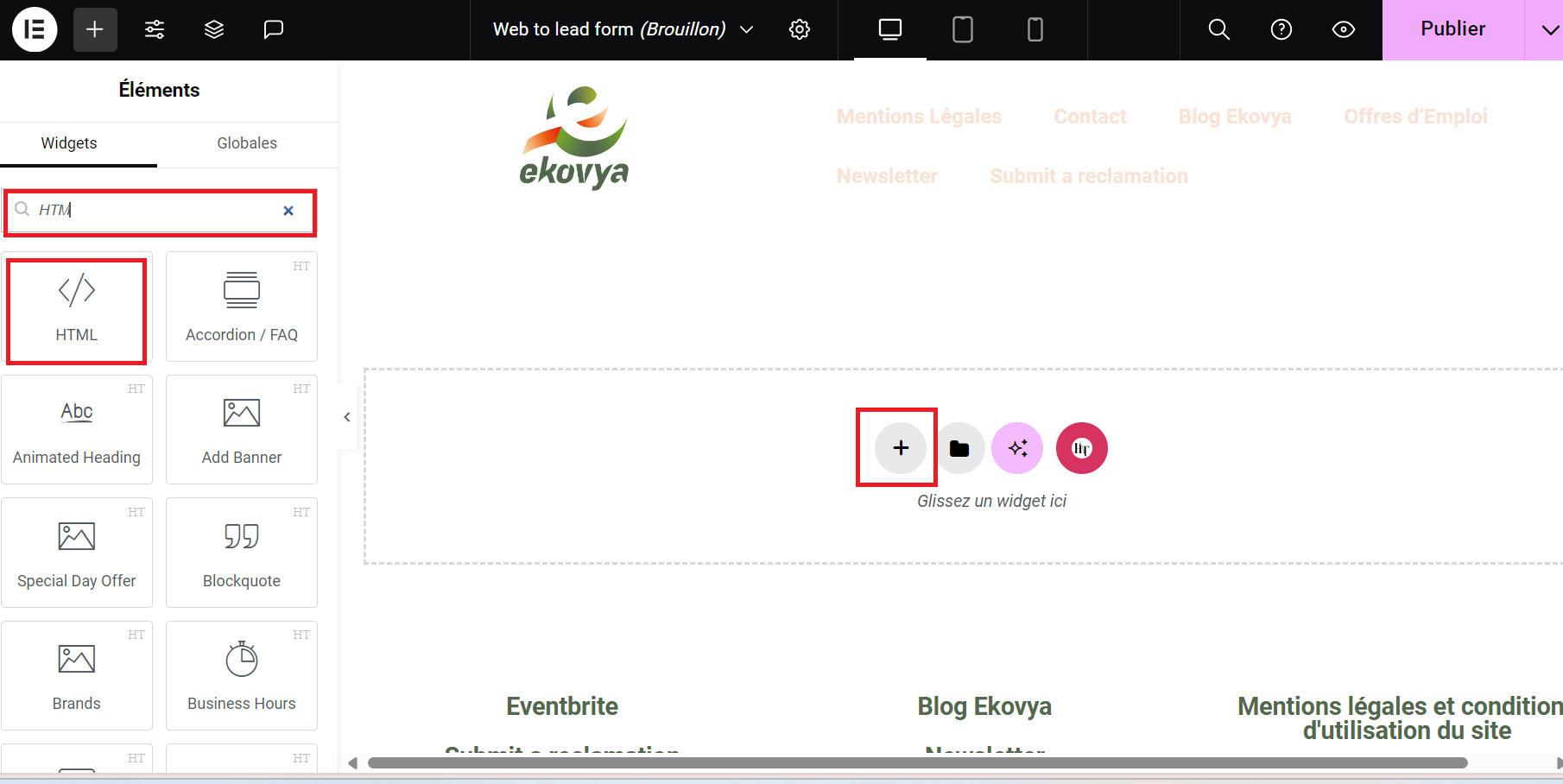
* Go to the Elementor click on Add a page



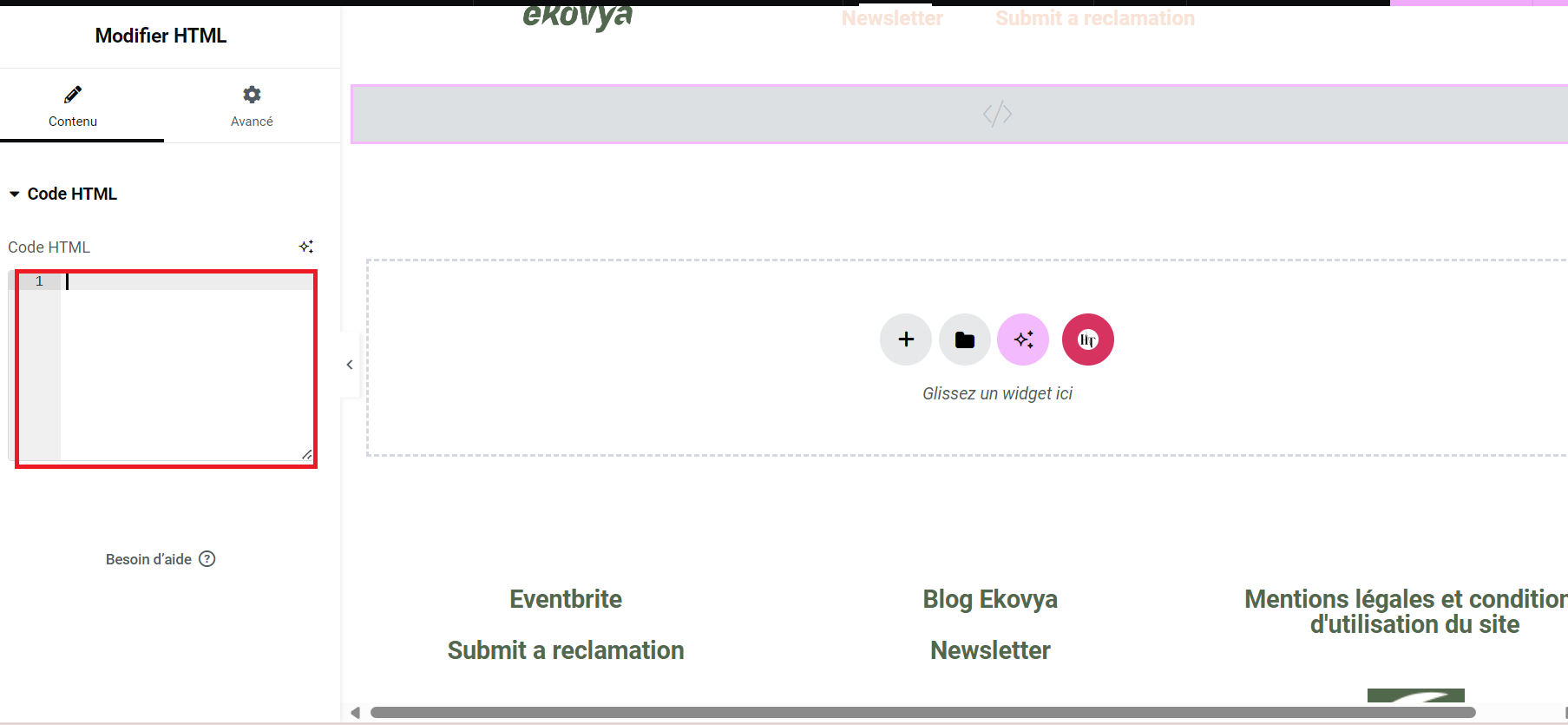
* Name the form

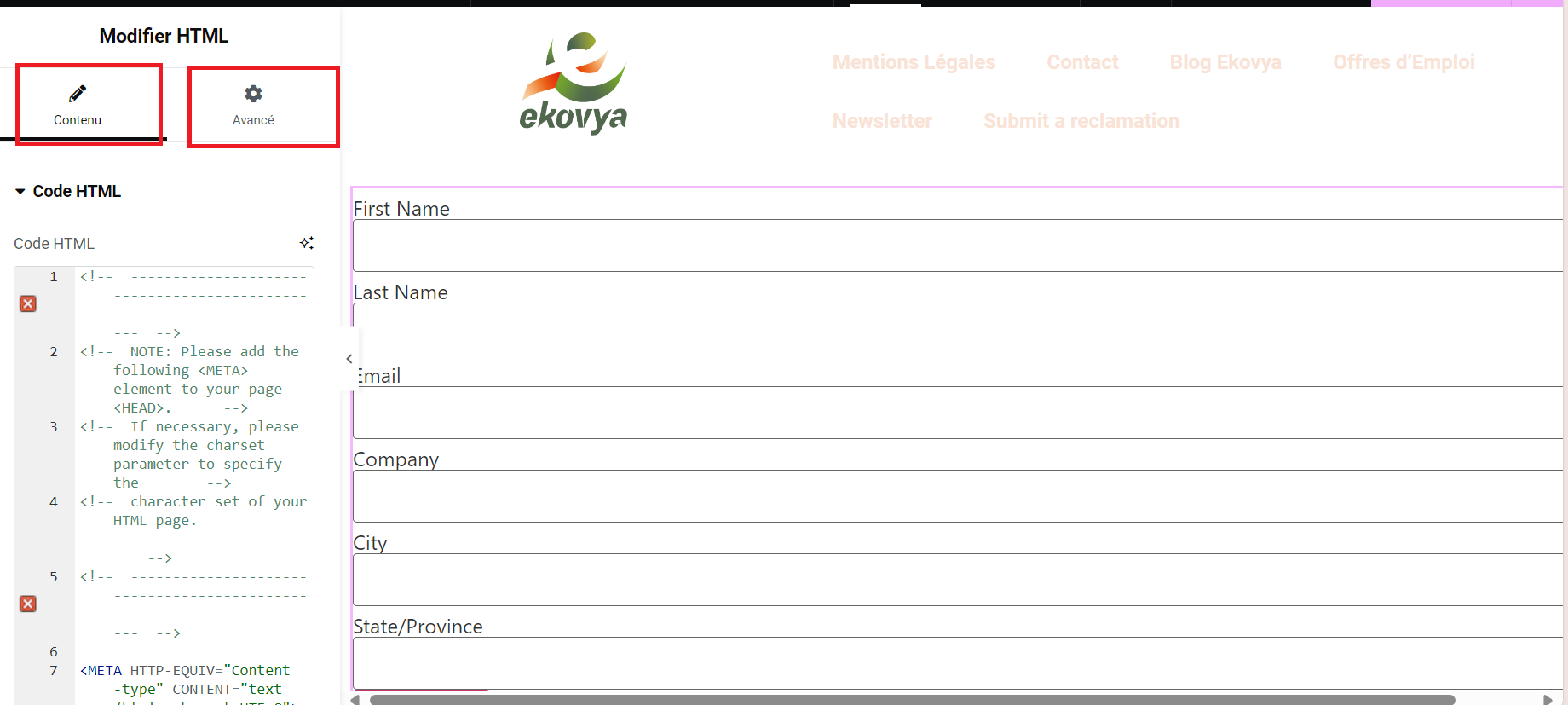


* From the quick finder enter HTML and then click + for add the HTML sample



* Paste the HTML sample in the the Code HTML box

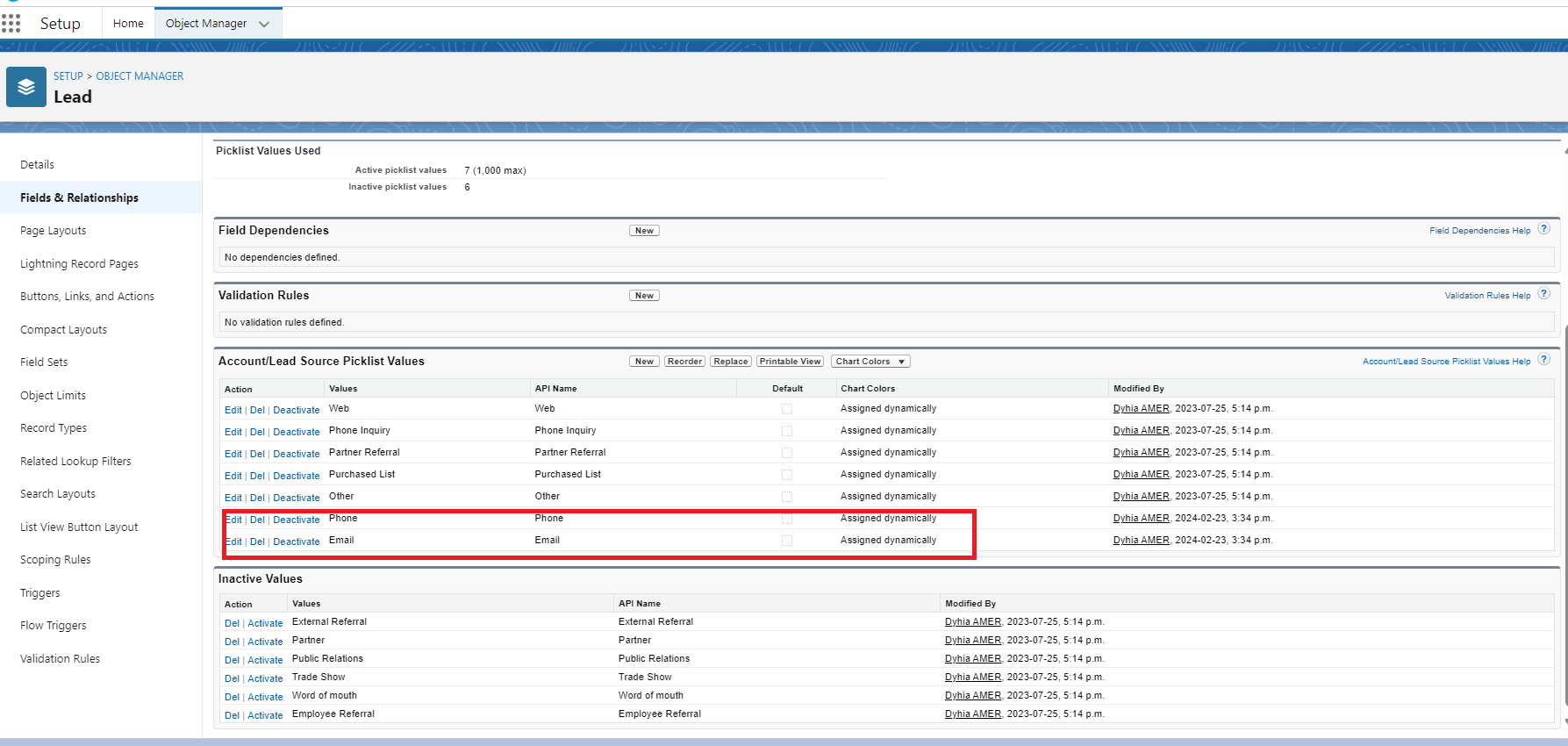
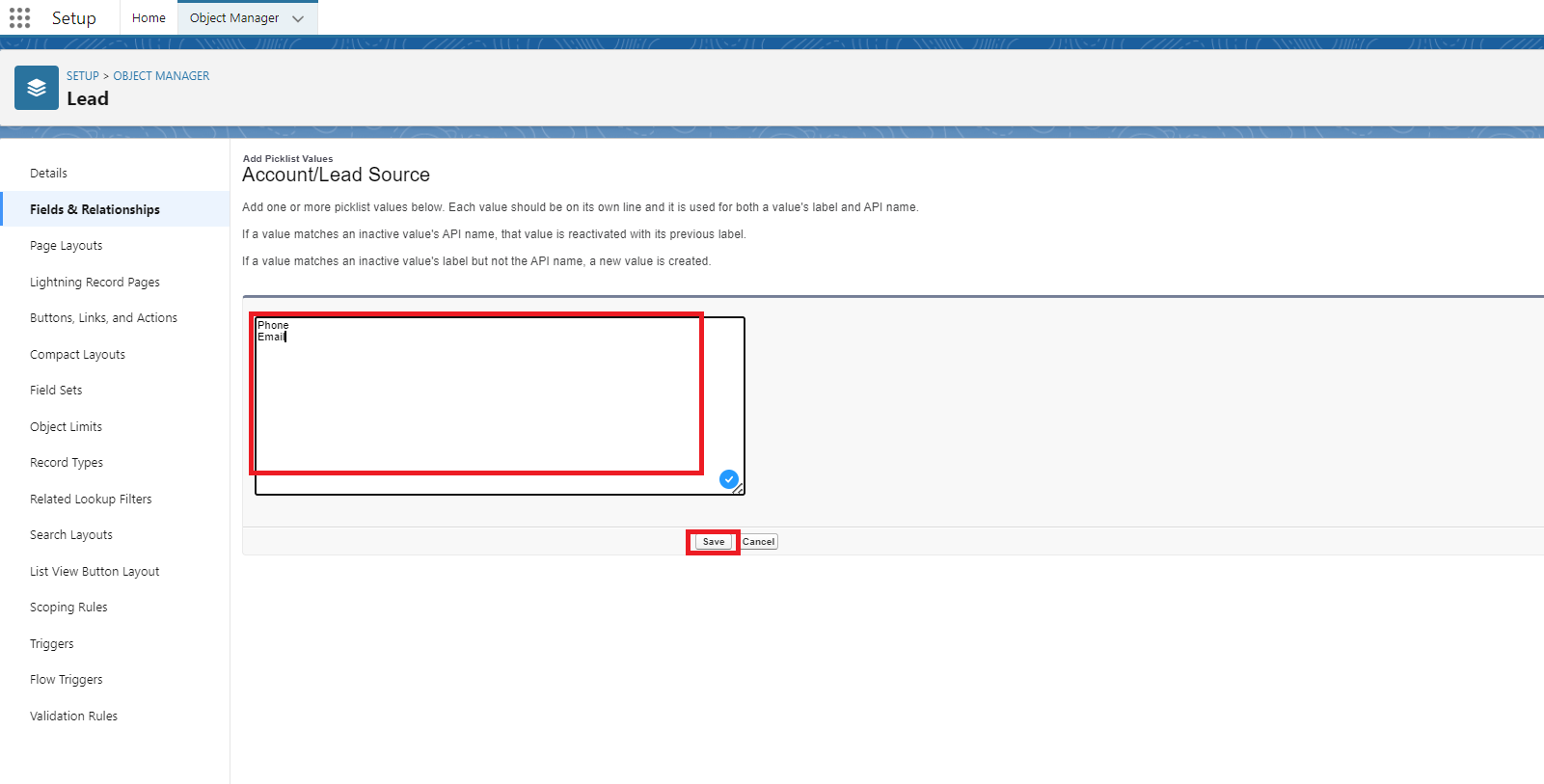
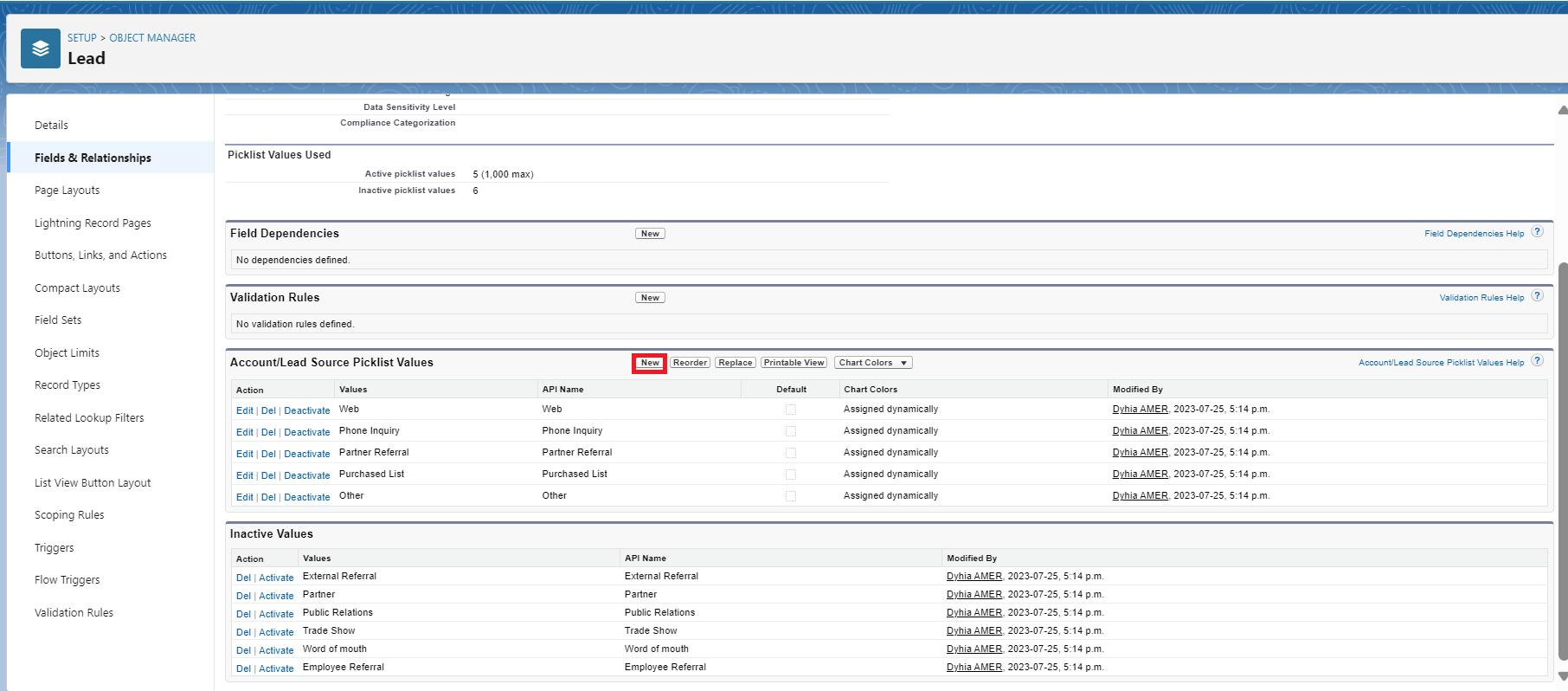
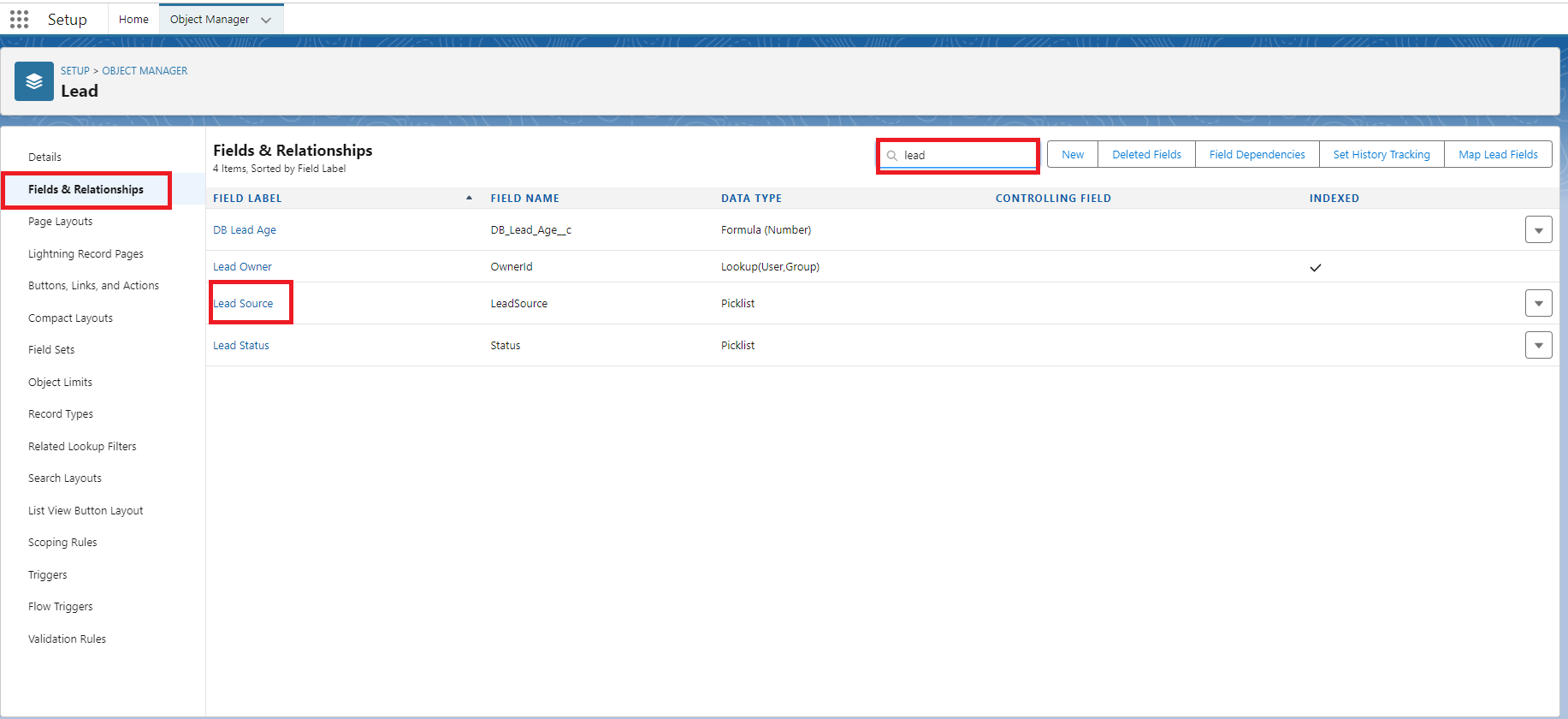




## 3. Scoring

## 1. Set up a validation rule

* Add fields



Set up the rule

