

United Solar's Salesforce Implementation

Streamlining workflow and
driving sales growth



Project Overview

The Company:

- A leading provider of solar panel production and installation services.

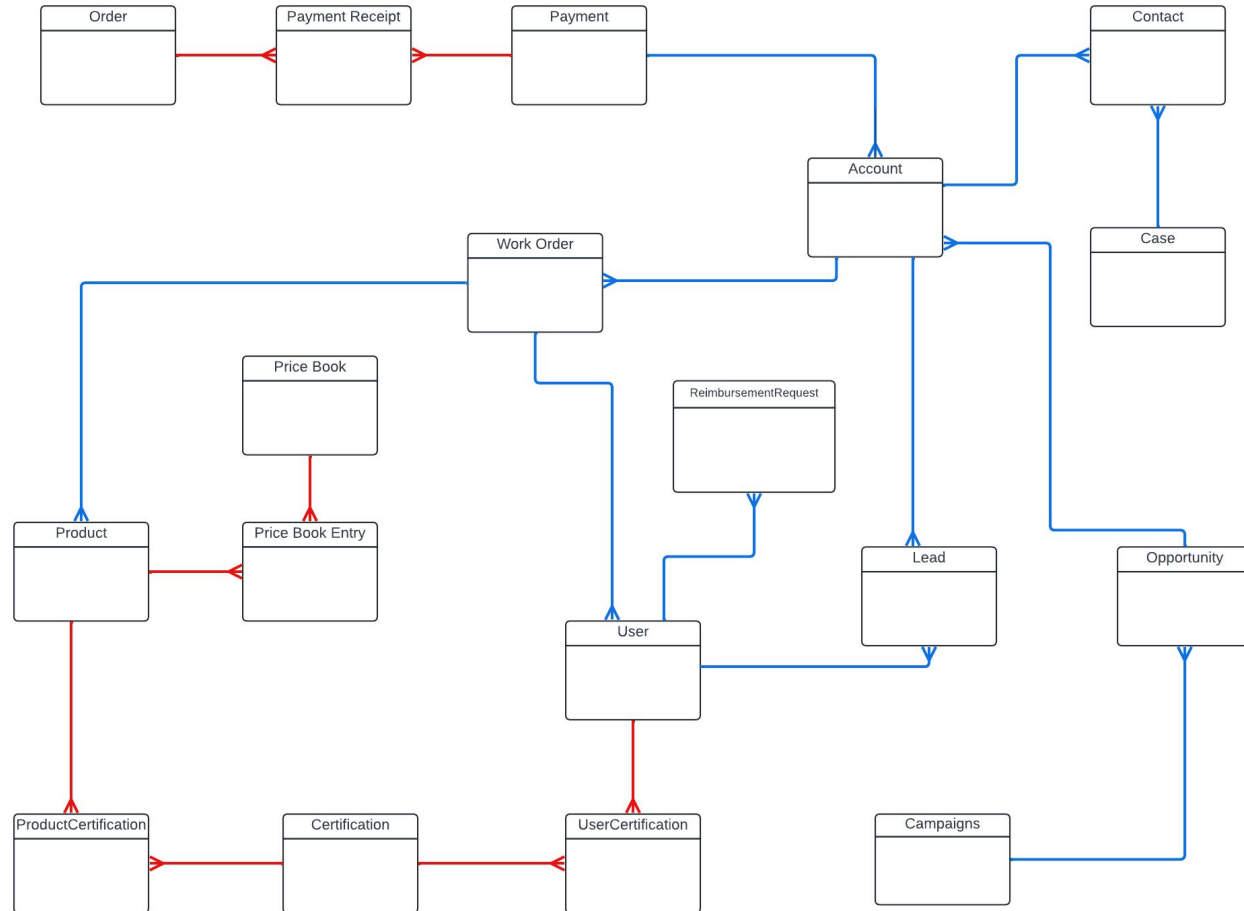
Our Goal:

- Customize Salesforce to meet the unique needs of United Solar's diverse workforce.

Outcome:

- Improved operational efficiencies and decision-making.
- Enhanced customer engagement and service response times.

ERD



Miguel Use Cases

Fiscal Year Setup

Change Fiscal Year Period	
Name	Revature
Fiscal Year Start Month	<div>February ▼</div>
Fiscal Year is Based On	<div><input type="radio"/> The ending month</div> <div><input checked="" type="radio"/> The starting month</div>

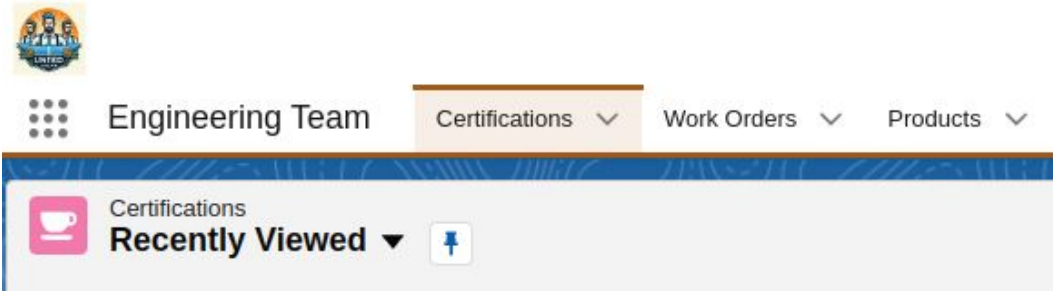
Use Case:

United Solar's fiscal year begins in February, but is otherwise the same as a normal fiscal year. They would like this reflected in Salesforce.

Solution:

Setup > Company Settings > Fiscal Year

Team-based Apps



Use Case:

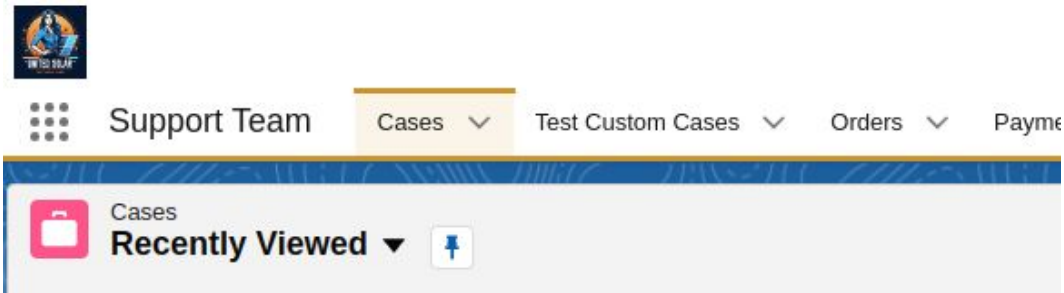
United Solar wants to have objects worked on by engineers to be in their own place and objects worked on by the support staff in another dedicated place so that these roles can easily access objects they work on.

Solution:

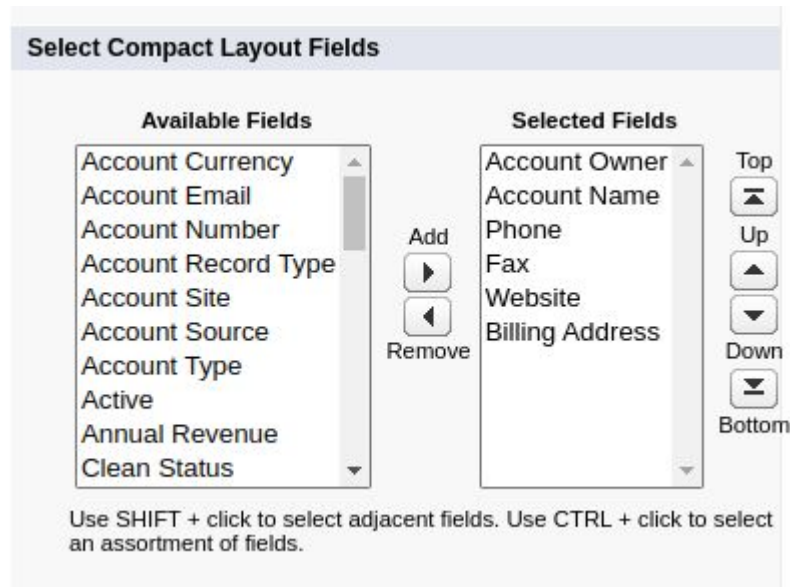
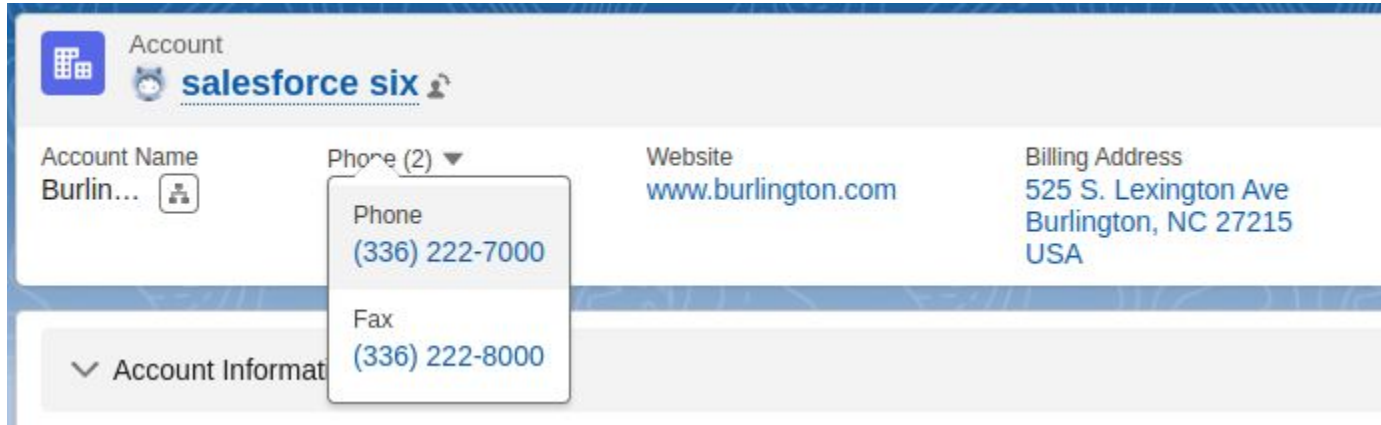
Setup > App Manager > New Lightning App

Engineering Team

Support Team



Lightning App Builder / Highlights Panel



Use Case:

For business records, Owner, Name, Phone Number, Fax, Website and Address are all commonly used fields. United Solar wants them to be displayed in the most convenient place so that they are visible at all times on the record page.

Solution:

Lightning App Builder > Highlights Panel > Compact Layouts

Premier Product Discounts

☒ Enable Orders

☐ Enable Reduction Orders [i](#)

☒ Enable Negative Quantity [i](#)

☐ Enable Zero Quantity [i](#)

Use Case:

United Solar would like a premier set of prices for their products that are at a 15% discount.

Solution:

1. Enable Orders & Allow Negative Quantities in Setup
2. Modify Opportunity Product object layout to include standard Discount field (had to use schema builder to access this object)
3. Apply FLS to discount field so that only certain profiles have edit access to it.

The image shows a Salesforce interface. On the left is the 'Opportunity Product' object layout, which includes fields like Created By, Date, Discount, Last Modified By, Line Description, List Price, Opportunity, Opportunity Product Name, Product, Product Code, Quantity, Sales Price, Subtotal, and Total Price. A context menu is open over the 'Discount' field, showing options: 'Hide Object on Canvas', 'View Object', and 'View Page Layouts'. On the right is a record view for 'GenWatt Gasoline 300kW' with the following values: Quantity 1.00, Product Code GC5020, Discount 15.00%, List Price USD 35,000.00, and Total Price USD 29,750.00.

Opportunity Product	
Created By	Lookup
Date	
Discount	Percent
Last Modified By	Lookup
Line Description	Text(255)
List Price	Currency(16, 2)
Opportunity	Lookup(Opportunity)
Opportunity Product Name	Text(376)
Product	Lookup(Product)
Product Code	Text(255)
Quantity	Number(10, 2)
Sales Price	Currency(16, 2)
Subtotal	Currency(16, 2)
Total Price	Currency(16, 2)

Product	
GenWatt Gasoline 300kW	
Quantity	1.00
Product Code	GC5020
Discount	15.00%
List Price	USD 35,000.00
Total Price	USD 29,750.00

Nonprofit

For nonprofits

Selected Values

Closed Won (Closed/Won, 100%, Closed) ▲

Add

Remove

Sales Process	
Action	Sales Process Name
Edit Del	<u>Business</u>
Edit Del	<u>Nonprofit</u>



Forecasting & Sales Process

Use Case:

United Solar plans on making a number of reports on their opportunity pipeline using Salesforce's forecast category. However, they would like to modify the existing process a bit:

- They would like three additional stages after Proposal/Price Quote - Hot with 95% probability and Best Case forecast category, Warm with 90% probability and Commit forecast category, Cold with 85% probability and Commit forecast category.
- They would like to remove the Negotiation/Review stage
- United Solar does some work for charities for heavily reduced cost. They would like these opportunities tracked using the same process as Salesforce's default, but they would like all forecast categories changed to omitted except for Closed Won, so that they don't contribute to the pipeline until won.

Solution:

Setup > Sales Processes

- Edit Opportunity Path Stages
- Separate Sales Processes

Calendars & Tasks

GMT -7

TUE 23

6am

7am

8am

9am

10am

11am

12pm

CRT-003 7:21am

CRT-004 7:54am

Use Case:

United Solar would like for Certifications and Work Orders to be able to be put on calendars and have tasks related to them.

Solution:

Setup > Public Calendars and Resources

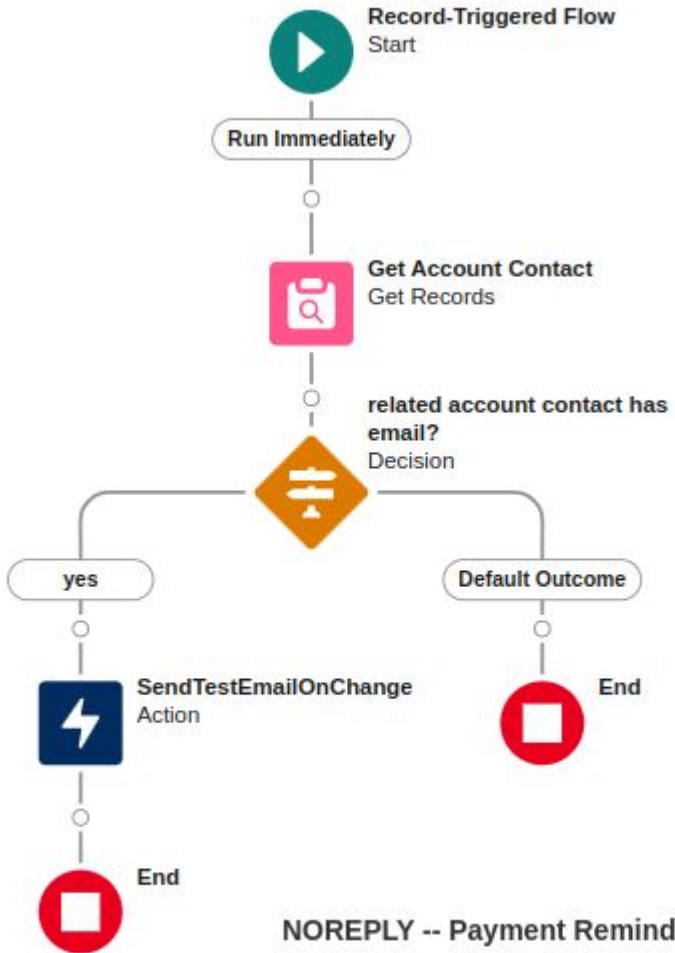
APRIL							2024 ▼
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
31	1	2	3	4	5	6	
7	8	9	10	11	12	13	
14	15	16	17	18	19	20	
21	22	23	24	25	26	27	
28	29	30	1	2	3	4	
5	6	7	8	9	10	11	

My Calendars

- My Events
- Certificate Calendar
- Tasks
- Work Orders

Other Calendars

- Jon dummy



NOREPLY -- Payment Reminder

✓ From: "salesforce six" <salesforce6@email.com> +

Your payment is due in 2 days!

Schedule-Triggered Flows

Use Case:

When the Next Payment Due Date is in two days, a contact from the business that made the order should be emailed a reminder

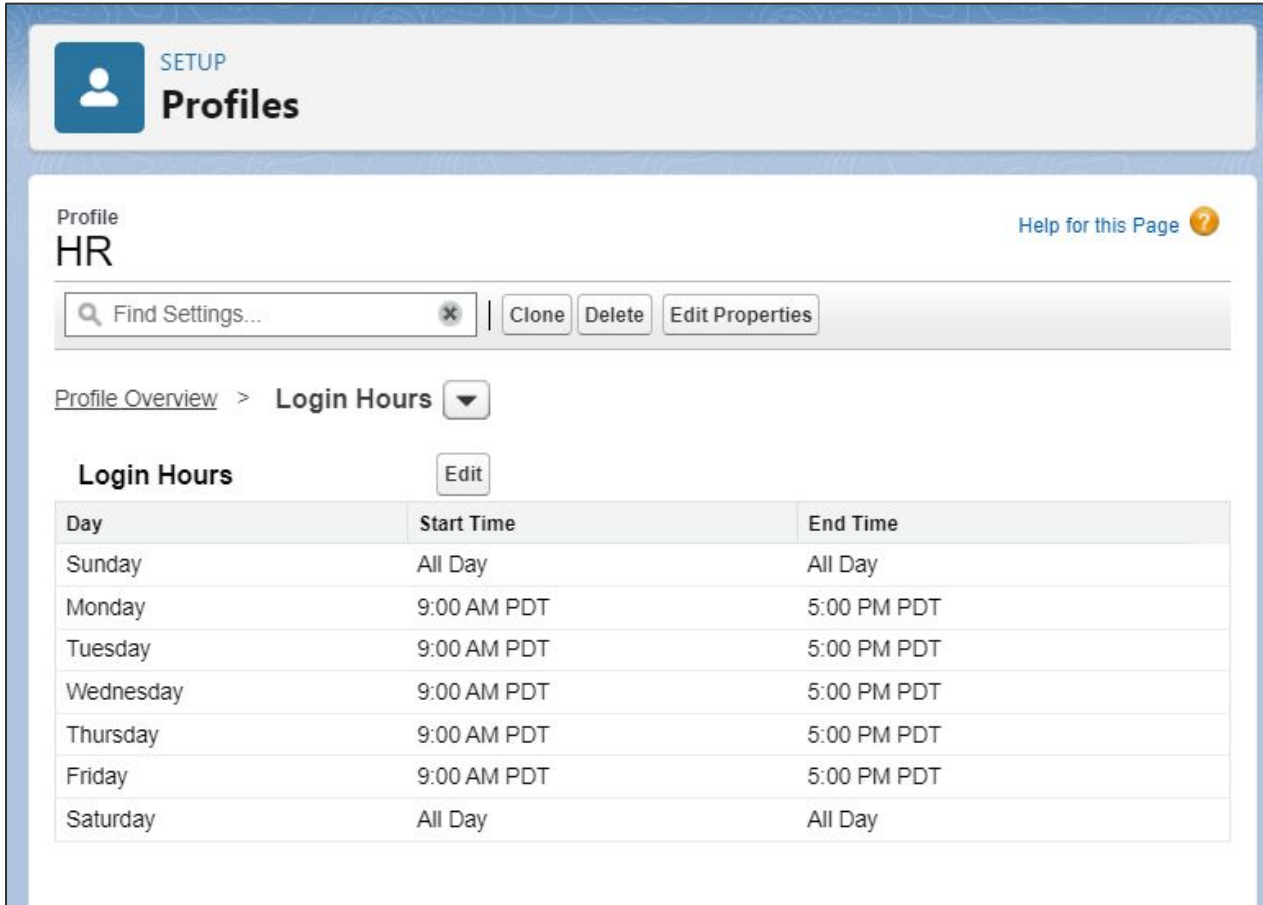
Solution:

Setup a schedule-triggered flow

Anthony Use Cases



Restricting HR Login Hours to Standard Work Hours (1 Point)



The screenshot shows the 'Setup Profiles' interface. The 'Profile' is named 'HR'. The 'Login Hours' section is active, displaying a table of login times for each day of the week. The table shows standard work hours (9:00 AM to 5:00 PM PDT) for weekdays and 'All Day' for weekends. An 'Edit' button is visible next to the 'Login Hours' header.

Profile
HR

Find Settings... | Clone Delete Edit Properties

Profile Overview > Login Hours

Login Hours Edit

Day	Start Time	End Time
Sunday	All Day	All Day
Monday	9:00 AM PDT	5:00 PM PDT
Tuesday	9:00 AM PDT	5:00 PM PDT
Wednesday	9:00 AM PDT	5:00 PM PDT
Thursday	9:00 AM PDT	5:00 PM PDT
Friday	9:00 AM PDT	5:00 PM PDT
Saturday	All Day	All Day

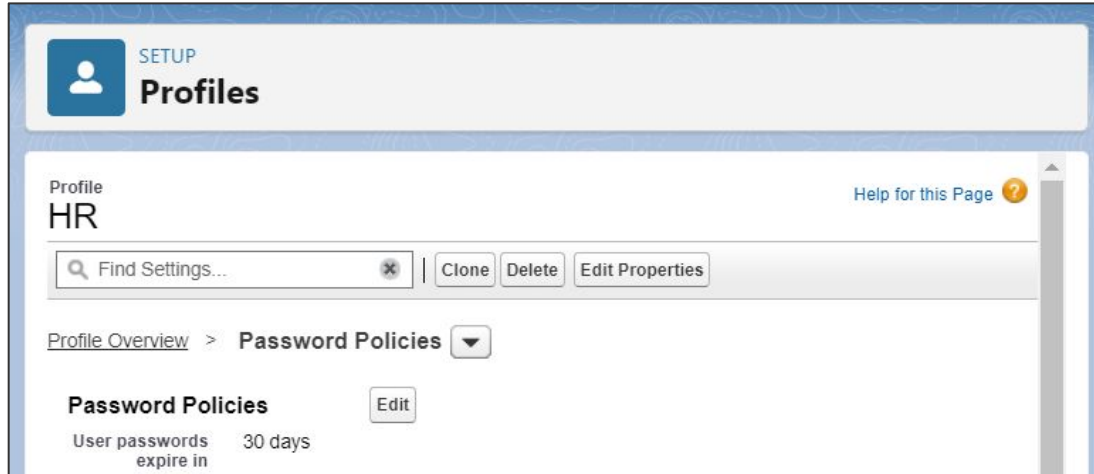
Use Case:

"HR should not be able to log in outside of work hours (9:00am - 5:00pm)."

Solution:

(Restrict HR Profile Login Hours): Setup > Users > Profiles > [Select HR Profile] > Login Hours > (click Edit) > Set weekdays to 9:00 AM - 5:00 PM > (click Save)

HR Password Policy Setup (2 Points)



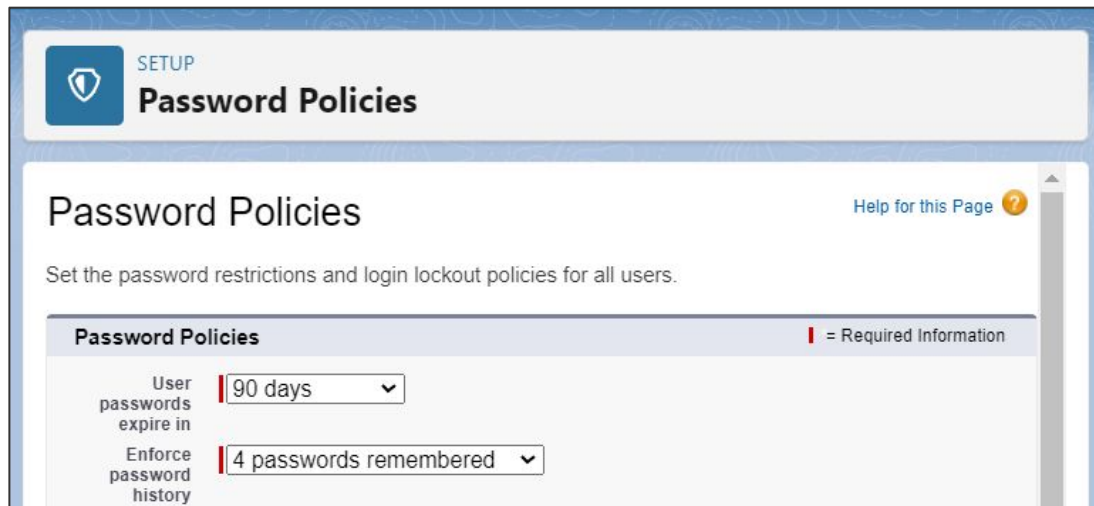
Use Case:

"United Solar wants to make sure the sensitive data accessible by HR representatives remains secure. In order to accomplish this, they request that HR passwords should expire every 30 days. They also want all users to have the last 4 passwords remembered when setting a new password."

Solution:

Step 1 (Update HR Profile Password Expiry Policy): Setup > Users > Profiles > [Select HR Profile] > Password Policies > (click Edit) > Set 'Password Expires in' to 30 Days

Step 2 (Modify Global Password History Settings) : Setup > Security > Password Policies > (click Edit) > Set 'Enforce password history' to 4 passwords remembered > (click Save)



Setup for Chatter External Licenses (2 Points)

SETUP
Users

New User #8
First Name
Last Name ChatterUser8
Email (User Name) ChatterUser8@mail.com
Profile Chatter External User
Role --None--

New User #9
First Name
Last Name ChatterUser9
Email (User Name) ChatterUser9@mail.com
Profile Chatter External User
Role --None--

New User #10
First Name
Last Name ChatterUser10
Email (User Name) ChatterUser10@mail.com
Profile Chatter External User
Role --None--

☐ Generate passwords and notify user via email

Save Cancel

Users

- Team
 - Role
 - Eastern Sales
 - Western
 - Sales Team

Use Case:

"United Solar wants to have 15 users with the Chatter External license for their partners. However, they do not want them to be able to log in yet, so make sure they don't get sent a password."

Solution:

(Add Users & Assign Them Chatter External License): Setup > Users > [Add Multiple Users] > Assign Chatter External License > Uncheck 'Generate password immediately and email to user' if selected > Enter 10 generic user names / Last Names / Chatter External User Profiles. (Repeat again, only do 5 more user).

Enhancing Visibility of Certifications (2 Points)

Use Case:

"Make it easy to see all the users with certifications and all the products a certification certifies for from a certifications record page."

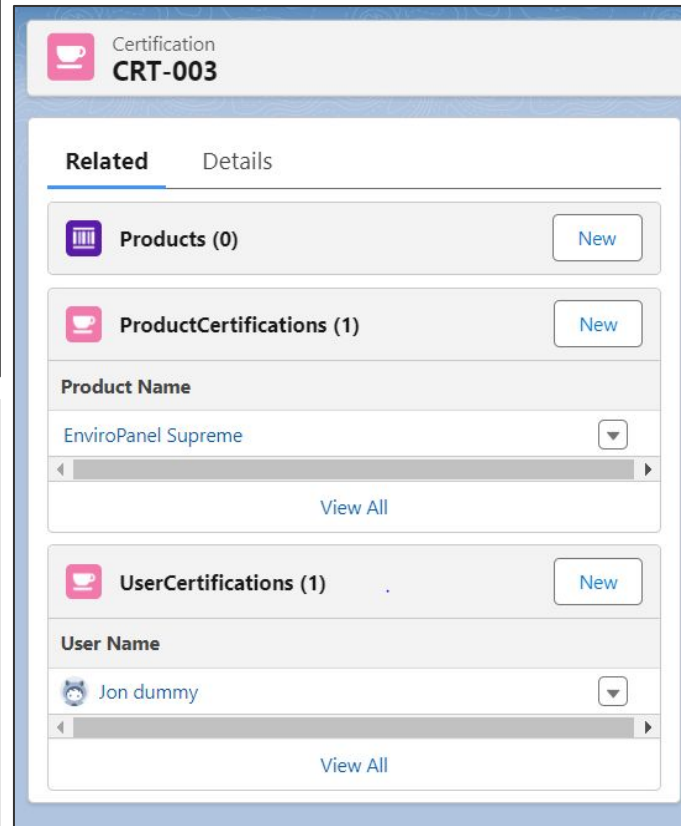
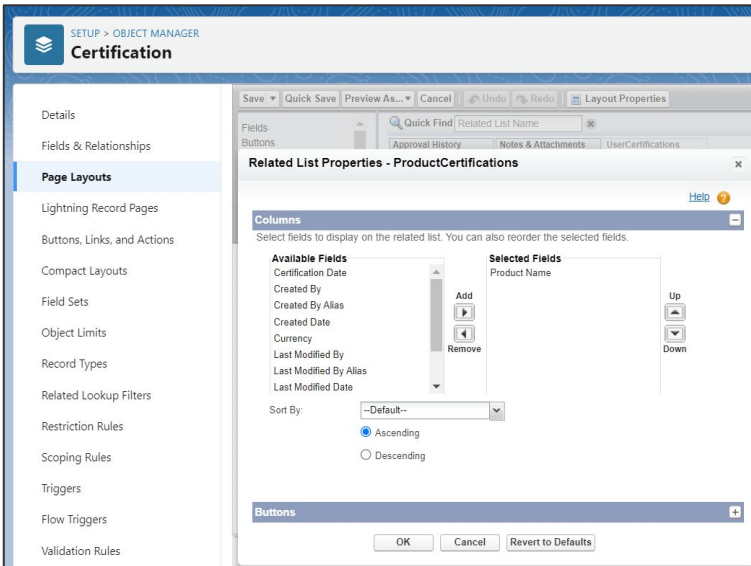
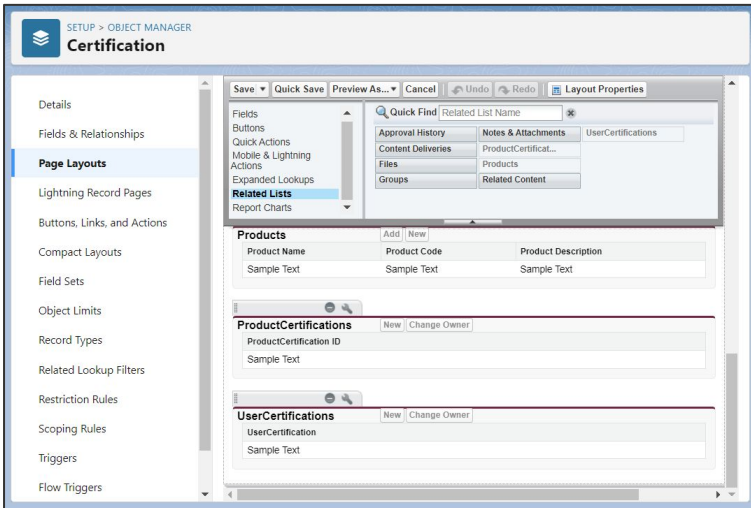
Solution:

Step 1 (Adding Related Lists to Certification Record Page):

Setup > Object Manager > Certification > Page Layouts > [Select Page Layout] > Related Lists > Add 'UserCertifications' and 'ProductCertifications' > Save

Step 2 (Customizing Related Lists to Show Detailed Information) :

Setup > Object Manager > Certification > Page Layouts > [Select Page Layout] > Related Lists > UserCertifications > Add Fields to Related List (User Name) > Save > Related Lists > ProductCertifications > Add Fields to Related List (Product Name) > Save



Displaying Work Order Progress as Banner (2 Points)

SETUP > OBJECT MANAGER

Work Order

No dependencies defined.

Validation Rules [New](#) [Validation Rules Help](#) ?

No validation rules defined.

Status Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Status Picklist Values Help](#) ?

Action	Values	API Name	Status Category	Default	Chart Colors	Modified By
Edit Deactivate	New	New	New	<input checked="" type="checkbox"/>	Assigned dynamically	salesforce six 4/16/2024, 2:28 PM
Edit Del Deactivate	Assigned	Assigned	None	<input type="checkbox"/>	Assigned dynamically	salesforce six 4/24/2024, 1:57 PM
Edit Del Deactivate	Planning	Planning	None	<input type="checkbox"/>	Assigned dynamically	salesforce six 4/24/2024, 1:57 PM
Edit Del Deactivate	Working	Working	None	<input type="checkbox"/>	Assigned dynamically	salesforce six 4/24/2024, 1:57 PM
Edit Del Deactivate	New Estimate Required	New Estimate Required	None	<input type="checkbox"/>	Assigned dynamically	salesforce six 4/24/2024, 1:58 PM
Edit Del Deactivate	Done	Done	None	<input type="checkbox"/>	Assigned dynamically	salesforce six 4/24/2024, 1:57 PM

Inactive Values

Action	Values	API Name	Status Category	Modified By
Del Activate	In Progress	In Progress	In Progress	salesforce six 4/24/2024, 1:55 PM
Del Activate	On Hold	On Hold	On Hold	salesforce six 4/24/2024, 1:56 PM
Del Activate	Completed	Completed	Completed	salesforce six 4/24/2024, 1:56 PM
Del Activate	Closed	Closed	Closed	salesforce six 4/24/2024, 1:56 PM
Del Activate	Cannot Complete	Cannot Complete	Cannot Complete	salesforce six 4/24/2024, 1:56 PM
Del Activate	Canceled	Canceled	Canceled	salesforce six 4/24/2024, 1:56 PM

Use Case:

"For work orders, United Solar uses the following process to track progress on them: New > Assigned > Planning > Working > New Estimate Required > Done United Solar wants this process displayed prominently on a work order record page, ideally as some kind of banner."

Solution:

(Customize Work Order Status Field): Setup > Object Manager > Work Order > Fields & Relationships > Status > Edit > Remove default status fields > Add Status Values ('New', 'Assigned', 'Planning', 'Working', 'New Estimate Required', 'Done') > Save.

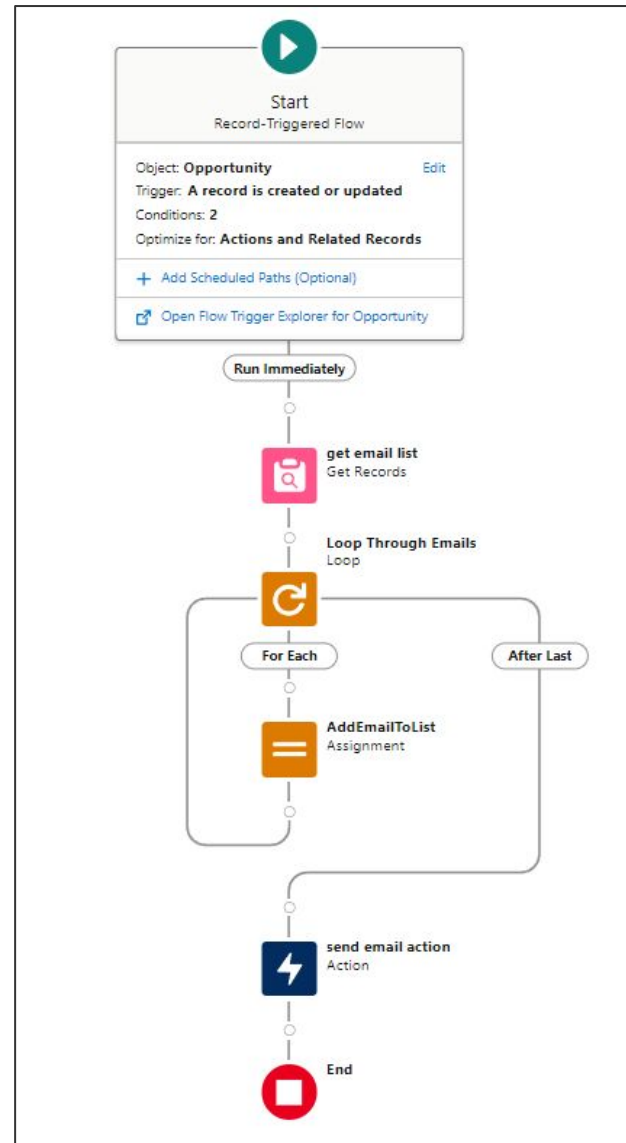
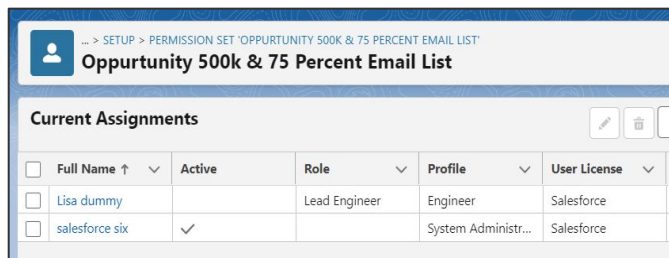
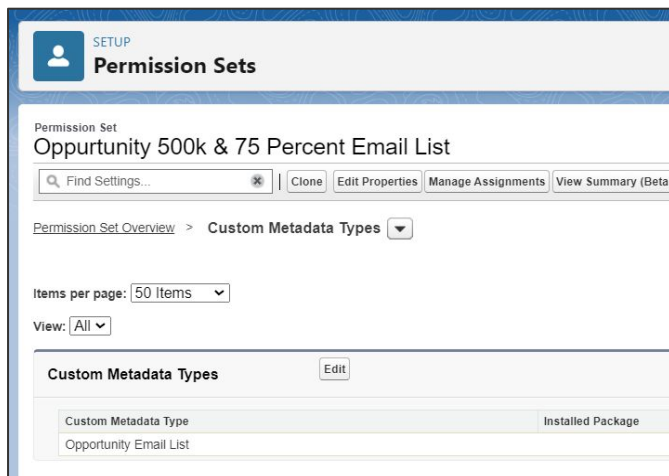
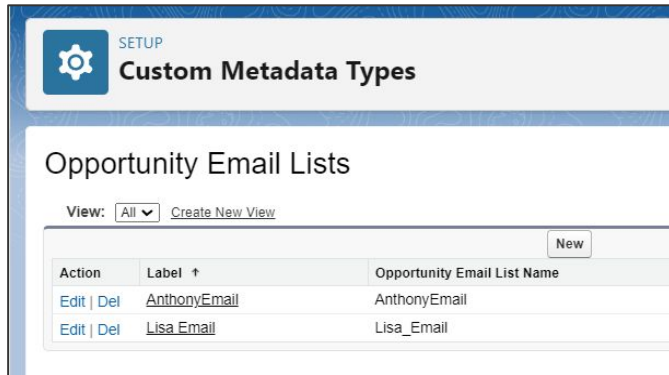
Work Order 00000002 [New Contact](#) [New Lead](#) [Edit](#) ▼

Owner [salesforce six](#) Case Status New Start Date End Date Subject

[New](#) Assigned Planning Working New Estimate Re... Done [✓ Mark Stage as Complete](#)

Note: Work Order standard object already comes with a path (banner) for status by default. If it did not, I would have also had to create a path in lightning app builder for this page to make the path (banner) and display it on the page.

Email Notification for High-value Opportunities (2 Points)



Use Case:

"United Solar would like a list of people to be emailed when opportunities reach or exceed a \$500,000 amount with a 75% likelihood. This list is currently just Lisa, but may change in the future and the delegated admin responsible for it will not understand flows, so make sure he doesn't have to update a flow."

Solution:

Step 1 (Create and Configure Custom Metadata Type) : Setup > Custom Code > Custom Metadata Types > New Custom Metadata Type > Enter necessary details and Save > Add Custom Fields > New Field > Choose Field Type (e.g., Email) > Enter Field Details and Save > Manage Custom Metadata Type > Add Records > Enter email addresses.

Step 2 (Enable Access to Custom Metadata Type via Permission Set) : Setup > Users > Permission Sets > New Permission Set > Custom Metadata Types Access > Edit > Find Custom Metadata Type > Enable The Custom Metadata Type > Save.

Step 3 (Build and Activate an Email Notification Flow) : Setup > Platform Tools > Process Automation > Flows > New Flow > Select Flow Type (e.g., Record-Triggered Flow) > Configure Trigger and Criteria for Opportunities > Get Records (Custom Metadata Type for Emails) > Loop Through Records > Concatenate Emails > Send Email > Save > Debug/Test > Activate.

Streamlining Support Ticket Assignment (3 Points)

SETUP

Queues

Queue

General Support Queue

Help for this Page

Edit

Delete

Label	General Support Queue	Queue Name	General_Support_Queue
Queue Email		Send Email to Members	<input type="checkbox"/>
Supported Objects	Case		
Created By	salesforce six, 4/27/2024, 12:57 PM	Modified By	salesforce six, 4/27/2024, 12:57 PM

View All Users

Name	Type
salesforce six	User
Alexandra dummy	User

SETUP

Case Assignment Rules

Case Assignment Rule

Support Ticket Assignment

Help for this Page

Rule Detail

Edit

Rule Name	Support Ticket Assignment	Active	<input checked="" type="checkbox"/>
Created By	salesforce six, 4/27/2024, 1:16 PM	Modified By	salesforce six, 4/27/2024, 1:27 PM

Edit

Rule Entries

New

Reorder

Action	Order	Criteria	Assign To	Email
<div>Edit</div> <div>Del</div>	1	(Case: Case Reason NOT EQUAL TO Breakdown) AND (Case: Case Reason NOT EQUAL TO Performance)	General Support Queue	<input type="checkbox"/>
<div>Edit</div> <div>Del</div>	2	(Case: Case Reason EQUALS Breakdown) AND (Case: Case Reason EQUALS Performance)	Alexandra dummy	<input type="checkbox"/>

Use Case:

"United Solar plans on adding more support specialists in the future, but just to get started they would like all support tickets to be assigned to a queue that has both the admin and Alexandra. If a ticket's reason is for Breakdown or Performance, they would like it automatically assigned to Alexandra though."

Solution:

Step 1 (Setup the Queue and its Members):

Setup > Users and Access > Queues > New Queue > Queue Name: General Support Queue > Supported Objects: Choose Cases > Queue Members: Add admin, Alexandra > Save

Step 2 (Configure Case Assignment Rules):

- Setup > Service > Case Assignment Rules > New Rule > Rule Name: Support Ticket Assignment > Set as Active: Check > Save
- New Rule Entry > Sort Order: 1 > Criteria: Case Reason NOT EQUALS 'Breakdown', 'Performance' > Assigned To: General Support Queue > Save
- New Rule Entry > Sort Order: 2 > Criteria: Reason EQUALS 'Breakdown' OR 'Performance' > Assigned To: Alexandra > Save

Payment Receipt Amount Validation (2 Points)

SETUP > OBJECT MANAGER
Payment Receipt

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Rule Name:

Active: ☒

Description:

Error Condition Formula

Example: `Discount_Percent__c > 30` [More Examples...](#)
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator

Check Syntax

Functions

-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
[Help on this function](#)

Error Message

Example: `Discount percent cannot exceed 30%`
This message will appear when Error Condition formula is true

Error Message:

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ☒ Top of Page ☐ Field

Use Case:

"The Payment Amount on a Payment Receipt should never be more than the remaining amount to be paid on an Order."

Solution (Create Validation Rule on Payment Receipt Object):

Setup > Object Manager > Payment Receipt > Validation Rules > New
> Enter Rule Name: "Payment Amount Validation" > Enter Error Condition Formula: `Payment__r.Amount > Order__r.Amount_Owed__c` > Enter Error Message: Payment Amount cannot exceed the Amount Owed on the Order. > Set Error Location to "Field" > Select the "Amount" field > Save.

New Payment Receipt

Information

* Payment Receipt Name:

* Order:

* Payment:

* Status:

* Payment Due Date:

Account:

Currency:

We hit a snag.

Review the errors on this page.

- Payment amount cannot exceed amount owed on order

Active Order Monitoring Report Adjustments (3 Points)

The screenshot shows the Salesforce 'Permission Sets' setup for 'Lisa dummy'. The 'Available Permission Sets' list includes: Buyer, Buyer Manager, C360 High Scale Flow Integration User, CRM User, Commerce Admin, Data Cloud Home Org Integration User, DeliveryEstimationServicePermSet, FieldServiceMobileStandardPermSet, Finance status field, and Merchandiser. The 'Enabled Permission Sets' list includes: Lead Engineer, Opportunity 500k & 75 Percent Email List, and Report Subscription Permissions. Below this, the 'Active Orders with Payment Discrepancy' report is shown with the following data:

Order Number	Account Name	Order Start Date	Order Amount	Amount Owed	Payment Discrepancy %
00000103	Test Sales Process Account	4/27/2024	USD 175,000.00	USD 4.00	100.00
00000104	Test Sales Process Account	4/27/2024	USD 35,000.00	USD 0.00	100.00
00000105	Test Sales Process Account	4/27/2024	USD 25,000.00	USD 10.00	99.96
				USD 14.00	299.96

Below the report, the 'Settings' section shows the frequency set to 'Daily', the time set to '9:00 PM', and the attachment set to 'Attach File'. The 'Recipients' section shows the email set to 'Lisa dummy' and the 'Edit Recipients' button.

Use Case:

"Lisa would like to be updated to the report on the money owed on active orders when there is more than a 10% difference between the amount charged and amount paid."

Solution:

Step 1 (Grant Lisa Necessary Report Permissions):

- Setup > Users > Permission Sets > New > Enter Label: "Report Subscription Permissions" > Enter API Name: "Report_Subscription_Permissions" > Save > System Permissions > Edit > Check the boxes next to: "Subscribe to Reports", "Subscribe to Reports: Add Recipients", "Subscribe to Reports: Send to Groups and Roles", "Subscribe to Reports: Set Running User" > Save > Setup > Users > Select Lisa's user profile > Permission Set Assignments > Edit Assignments > Add the "Report Subscription Permissions" permission set to the Enabled Permission Sets list > Save

Step 2 (Create Report using Orders Object):

Access Standard Report Type "Orders" > Customize columns to include "Order Number", "Account Name", "Order Start Date", "Order Amount", "Amount Owed", and "Payment Discrepancy" > Create a Row Level Formula named "Payment Discrepancy" that contains the formula: $(\text{ORDER_TOTAL_AMOUNT} - \text{Order.Amount_Owed_c}) / \text{ORDER_TOTAL_AMOUNT} * 100\%$ > Add a filter for the status to be "Activated" > Add filter to display only rows with a payment discrepancy greater than 10% > Save Report as Active Orders with Payment Discrepancy

Step 3 (Set Up Alerts for Lisa):

- Reports > New Folder > Folder Label: Enter a name for the folder, e.g., "Sales Reports" > Folder Unique Name: Enter a unique name for the folder, e.g., "Sales_Reports" > Save > Reports > Sales Report > Share > Select Share With Users > Add Lisa Name & Give View access > Click Share > Done > Reports > Select the folder containing the "Orders Payment Discrepancies" report (e.g., "Sales Reports") > Click on arrow at end of row for report > Click on "Subscribe" > Choose frequency > Entity Type User > User Name Lisa > Add > Click on "Save" to create the subscription.

Jason Use Cases

Profiles

Information

First Name

Lisa

Last Name

dummy

Alias

ldumm

Email

dummyprojectemail@mail.

Username

lisa1@mail.com

Nickname

Lisa

Role

Test Lead Engineer

User License

Salesforce

Profile

Engineer

Active

☒

Marketing User

☐

Offline User

☐

= Required Information

User Edit

Save

Save & New

Cancel

General Information

First Name

Cory

Last Name

dummy

Alias

cdumm

Email

dummyprojectemail@mail.

Username

cory@mail.com

Nickname

Cory

Role

<None Specified>

User License

Salesforce

Profile

Finance

Active

☐

Marketing User

☐

Offline User

☐

User Edit

Save

Save & New

Cancel

General Information

First Name

Alexandra

Last Name

dummy

Alias

adumm

Email

dummyprojectemail@mail.

Username

alexandra@mail.com

Nickname

Alexandra

Role

<None Specified>

User License

Salesforce

Profile

Support Rep

Active

☐

Marketing User

☐

Offline User

☐

User Edit

Save

Save & New

Cancel

General Information

First Name

Jon

Last Name

dummy

Alias

jdumm

Email

dummyprojectemail@mail.

Username

dummyprojectemail@mail.

Nickname

Jon

Role

Test Engineer

User License

Salesforce

Profile

Engineer

Active

☐

Marketing User

☐

Offline User

☐

User Edit

Save

Save & New

Cancel

General Information

First Name

Damian

Last Name

dummy

Alias

ddumm

Email

dummyprojectemail@mail.

Username

damian@mail.com

Nickname

Damian

Role

<None Specified>

User License

Salesforce

Profile

HR

Active

☐

Marketing User

☐

Offline User

☐

Jason Use Cases – Live Demo

Brandon Use Cases



Add Company Currencies (2 Points)

Active Currencies							New	Edit Rates	Change Corporate
Action	Currency Code	Currency Name	Corporate	Conversion Rate	Decimal Places	Last Modified By			
Edit Deactivate	JPY	Japanese Yen	<input type="checkbox"/>	154.290000	2	salesforce six , 4/17/2024, 11:32 AM			
Edit Deactivate	KRW	Korean Won	<input type="checkbox"/>	1,380.900000	2	salesforce six , 4/17/2024, 11:31 AM			
Edit Deactivate	USD	U.S. Dollar	<input checked="" type="checkbox"/>	1.000000	2	salesforce six , 4/17/2024, 11:26 AM			

Use Case:

"United Solar does business in the United States, Korea, and Japan. They need to allow their employees to see prices in the dollar, won and yen currencies."

Solution:

Setup -> Company Information -> Currency Setup -> New

Show remaining Amount Owed on Order (4 points)

Order

00000101

Account Name

Test Sales Process Account

Contract Number

00000101

Order Start Date

4/28/2024

Status

Activated

Order Amount

USD 38,300.00

Activated

Related

Details

Order Owner

salesforce six

Order Number

00000101

Account Name

Test Sales Process Account

Order Start Date

4/28/2024

Customer Authorized By

Company Authorized By

Billing Address

Activated By

salesforce six

Order Currency

USD - U.S. Dollar

Amount Owed

USD 38,200.00

Next Payment Due Date

Contract Number

00000101

Order Amount

USD 38,300.00

Order Type

Status

Activated

Shipping Address

Activated Date

4/28/2024, 11:56 PM

Created By

salesforce six, 4/27/2024, 8:44 AM

Last Modified By

salesforce six, 4/29/2024, 7:07 AM

Description

Use Case:

"Orders should have a field that displays how much money is owed that subtracts the amount paid from the payment receipts related to the order from the amount of the order. This should only include payment receipts that have a status of approved."















Solution:

Step 1: Add new field to Order object (amount owed)

Step 2: Create flow triggering on Order Product creation (related field) to assign the amount owed to order amount

Step 3: Create flow triggering on Payment Receipt to update amount owed based on amount in payment receipt

Assign Lisa to Engineering Leads (1 point)

Activity	Details	Chatter	News
Lead Owner	 Lisa dummy		
Name	test test		
Company	test		
Title			
Lead Source			
Industry	Engineering		
Annual Revenue			
Lead Currency	USD - U.S. Dollar		
Address			
Product Interest			
SIC Code			
Number of Locations			
Created By	 salesforce six, 4/29/2024, 7:25 AM		
Description			

Use Case:

"United Solar would like all leads from the engineering industry assigned automatically to Lisa."

Solution:

Create a new flow that triggers on lead creation with an entry requirement of the industry field being set to engineering. Grab Lisa's record and assign her user id to the owner id of the lead.

Data Loader:

Pros:

- Can handle large data volumes (5,000,000 records)
- Supports all objects, including custom objects
- Can perform insert, update, upsert, delete, hard delete, and export operations
- Can be configured to be automated through CLI
- Configurable to export only certain records or fields through filters

Cons:

- Requires installation and setup
- May be complex for users unfamiliar with data loading tools
- Command-line interface may not be user-friendly
- Only supports exporting in csv file format

Data Export Service:

Pros:

- Easy to use with a graphical interface
- No need for installation; it's built into Salesforce
- Supports a variety of file formats for export
- Can be scheduled to export weekly or monthly

Cons:

- Only works with custom objects and some standard objects
- May not be suitable for large data volumes due to it being limited to exporting up to 50,000 records per report
- Can only be used every 7 days

External Export:

Pros:

- Provides flexibility in choosing external tools and services for exporting data
- Can be used to integrate Salesforce with external databases
- Allows for custom data processing and manipulation outside of Salesforce

Cons:

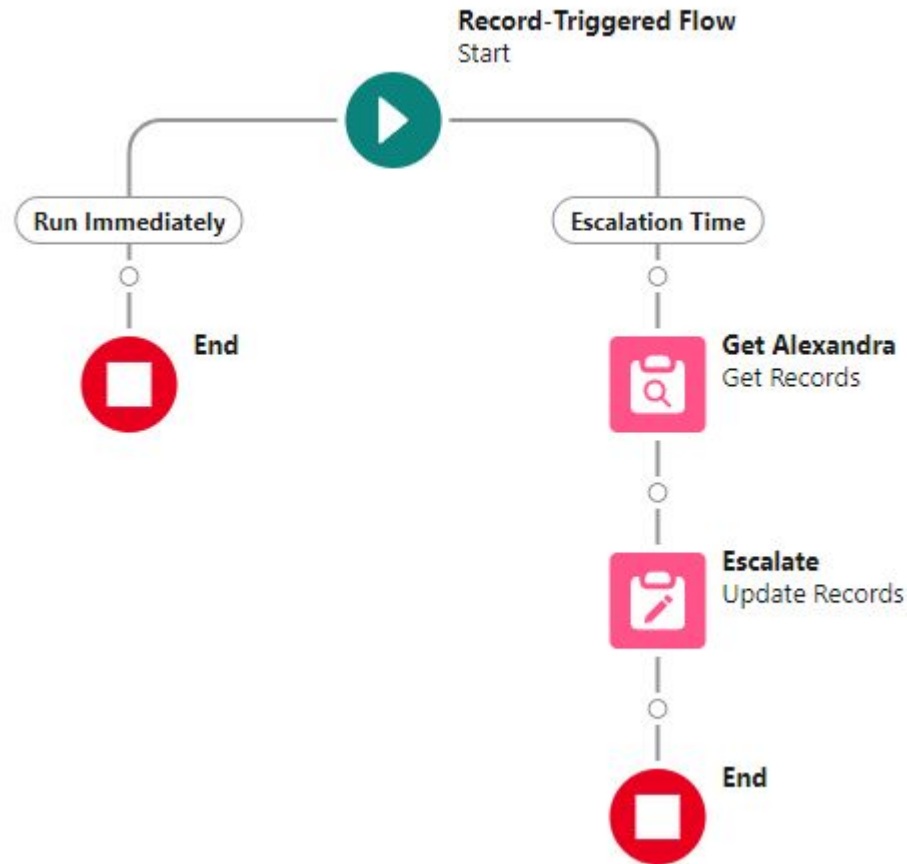
- Requires integration with external tools, which may add complexity
- May incur additional costs for external services

Export Options (2 points)

Use Case:

"United Solar is interested in keeping a backup of their Salesforce data. Present a written document analyzing the options available and the pros and cons of each solution."

Escalate Work Orders to Alexandra (2 points)



Use Case:

"United Solar wants support tickets that have had a "New" status for over 2 days to be escalated and assigned to Alexandra."

Solution:

Create a new flow that triggers on Case creation with an entry requirement of status being equal to "New". Add new escalation path with an offset of 2 days, then grab Alexandra's user record and assign her user id to the owner id on support ticket. Additionally alter the status field of the support ticket to "Escalated".

Finance reports (8 points)

Reports			
All Folders > Finance Team Reports			
3 items			
REPORTS	Name	Description	Folder
Recent	Show amount owed on active order		Finance Team Reports
Created by Me	Reimbursement amount spent		Finance Team Reports
Private Reports	Hot businesses grouped by country		Finance Team Reports

Report: Orders				
Show amount owed on active order				
Total Records		Total Amount Owed		
6		USD 426,286.00		
	Order Number	Status	Order Amount	Amount Owed
1	00000100	Activated	USD 3,086.00	USD 3,086.00
2	00000101	Activated	USD 38,300.00	USD 38,200.00
3	00000103	Activated	USD 175,000.00	USD 175,000.00
4	00000104	Activated	USD 35,000.00	USD 35,000.00
5	00000105	Activated	USD 25,000.00	USD 25,000.00
6	00000109	Activated	USD 150,000.00	USD 150,000.00
7				USD 426,286.00

Use Case:

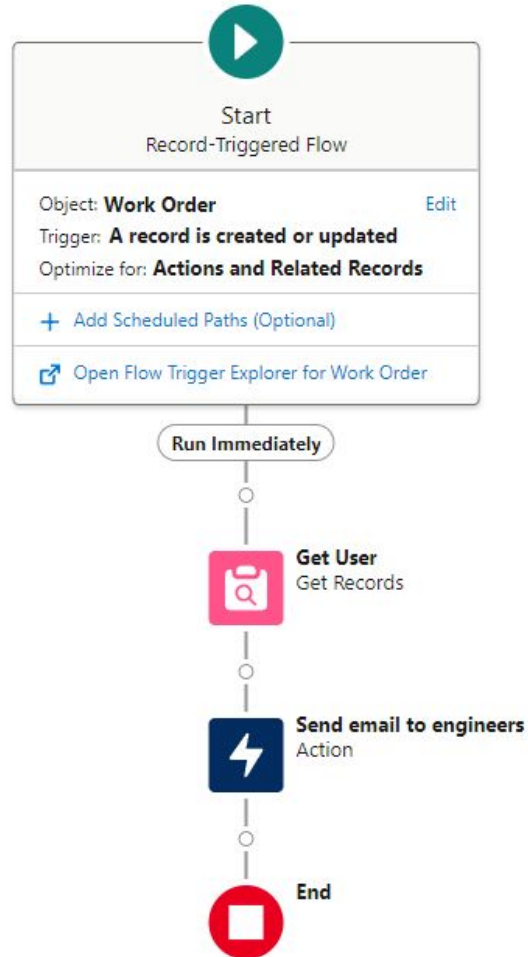
"The Finance team would like to have a place to see several reports easily. Here are the reports that they would like:

- A report on the amount of money owed on active orders
- A report on the number of hot rated business, broken down by region
- The amount of money spent on reimbursements"

Solution:

Create reports for each of the requirements, then add them all to a report folder for the Finance team. Reimbursement Request needed a custom report type set up in order to make the report for it.

Email Engineers about new work order (3 points)



Use Case:

"An engineer should be emailed when they are assigned to a work order."

Solution:

Create a flow triggers on work order on creation and update that grabs the user that is assigned, with a requirement of the user role being engineer, then create an action that sends an email template to the user using their user id.

Abdoul Use Cases

New User Email Link Expiration

Navigate to the Clock icon

- Select Setup in Obj Manager
- Enter Session Setting in Quick find
- Scroll down until you find New User Email.
- Update the data

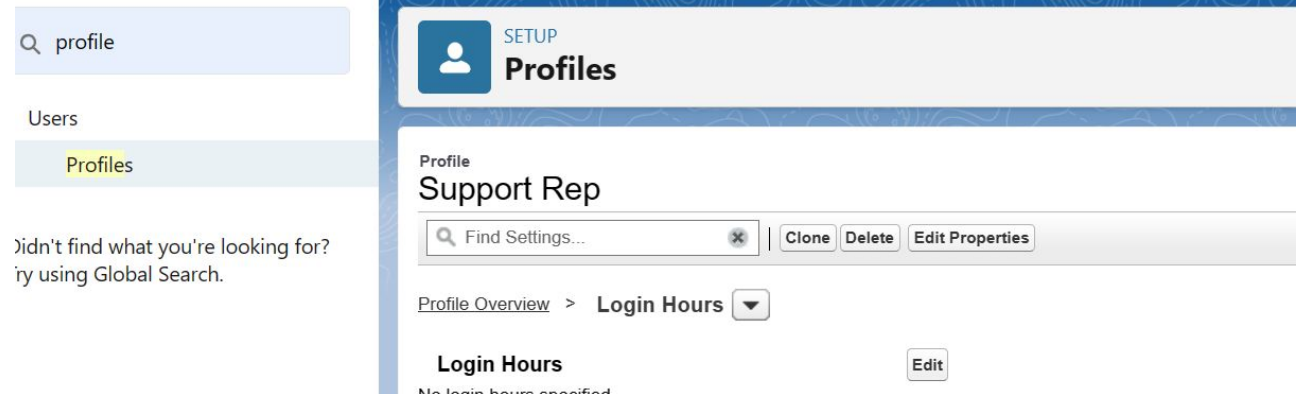
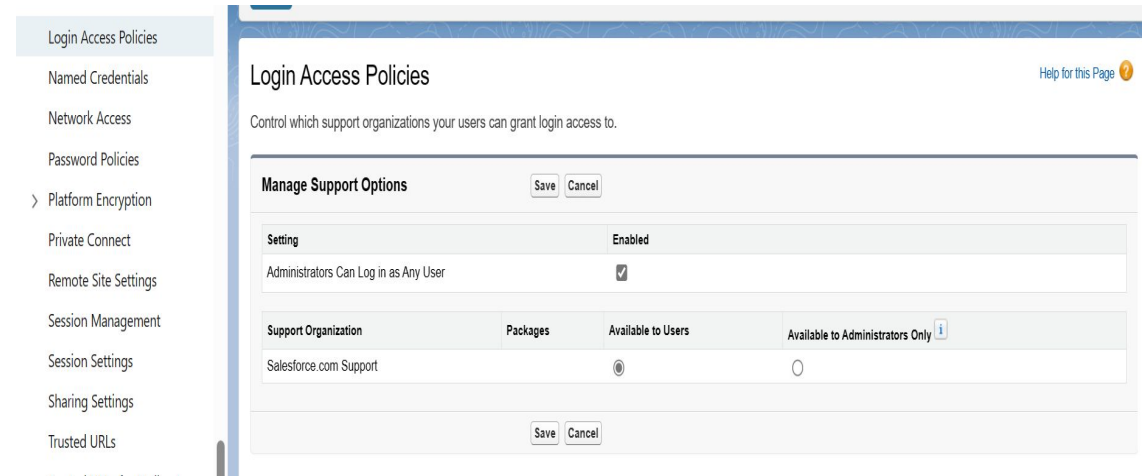
The screenshot shows a web application interface for configuring session settings. On the left is a sidebar menu with the following items: Security, Guest User Sharing Rule Access Report, Health Check, Login Access Policies, Named Credentials, Network Access, Password Policies, Platform Encryption, Private Connect, Remote Site Settings, Session Management, Session Settings (highlighted), Sharing Settings, Trusted URLs, and Trusted URLs for Redirects. The main content area is titled 'Session Settings' and includes a 'SETUP' button. It contains three sections: 'Passwordless Login' with two empty boxes and a 'Remove' button; 'Logout Page Settings' with a 'Logout URL' text box and an information icon, and a checkbox for 'Store the redirect logout URL in your local browser'; and 'New User Email' with a 'Link expires in' dropdown menu set to '1 day' and an information icon. At the bottom right are 'Save' and 'Cancel' buttons.

User Login Hours Restriction

- In Quick Menu enter Login Access Policies
- Enable Administrator can login as any user

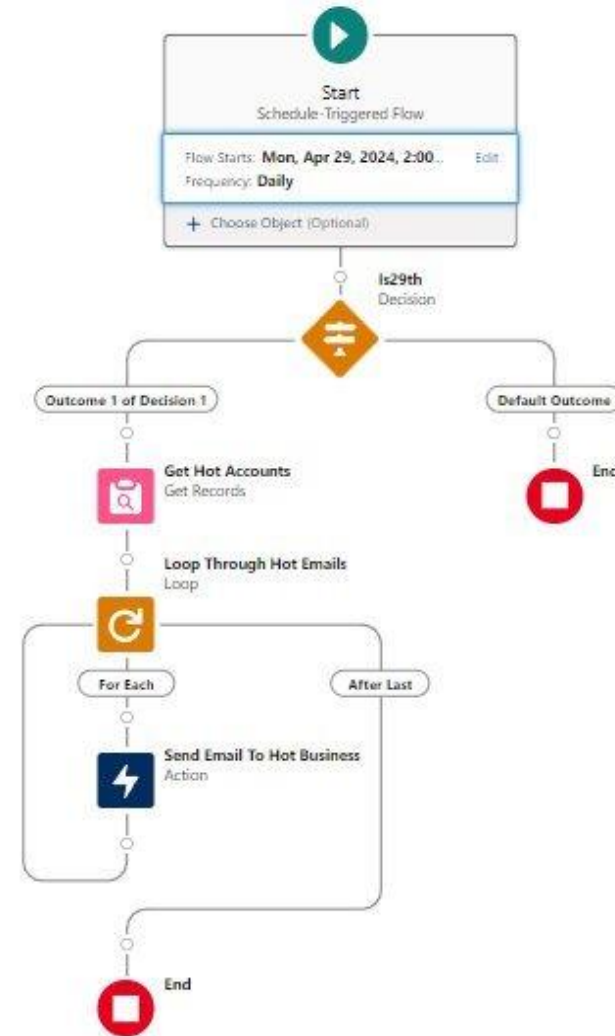
Then you will go to user profile in the System under user profile

Update the data



Thank you Email to Hot rating account

- Created Schedule Triggered Daily Flow
- Created Formula to save current day as number (IE 29 if it is 29th)
- Add decision to see if current day variable Equals 29th
- Get all accounts that are Rated Equals Hot
- Loop through Emails from hot rated Accounts
- For each Loop: Send Thank You Email



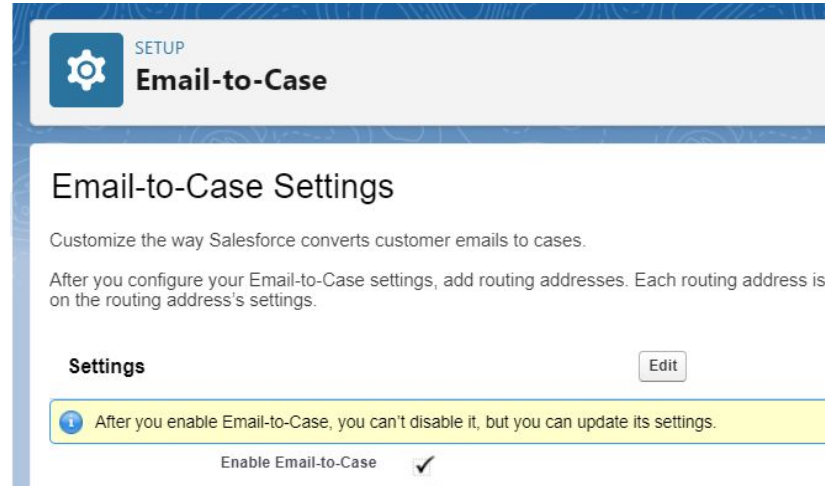
Automated Email Notifications for Tickets

- Create record trigger flow that triggers when the Support Ticket has status equals "Accepted"
- Send email to to the record that triggered flow. In this case, it would be the Support Ticket Contacts Email
- Made Contact required when creating support ticket to ensure Contact Email is never missing.



Email to a specific email

1. Enable Email-to-Case in Salesforce
2. Create a routing address for receiving emails
3. Configure Email-to-Case settings



SETUP Email-to-Case

Email-to-Case Settings

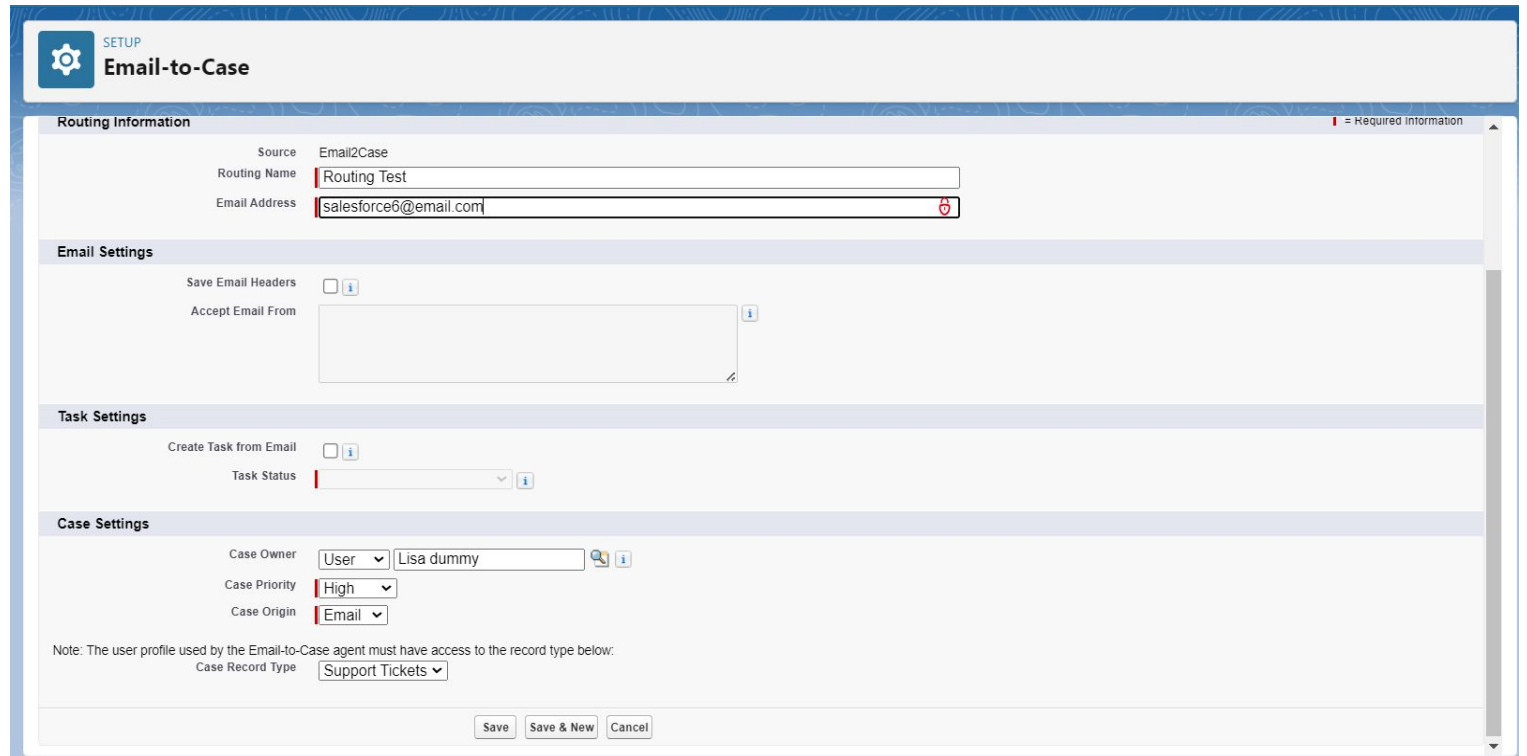
Customize the way Salesforce converts customer emails to cases.

After you configure your Email-to-Case settings, add routing addresses. Each routing address is a on the routing address's settings.

Settings [Edit](#)

Info After you enable Email-to-Case, you can't disable it, but you can update its settings.

Enable Email-to-Case ☒



SETUP Email-to-Case

Routing Information

Source Email2Case

Routing Name

Email Address

Email Settings

Save Email Headers ☐

Accept Email From

Task Settings

Create Task from Email ☐

Task Status

Case Settings

Case Owner

Case Priority

Case Origin

Note: The user profile used by the Email-to-Case agent must have access to the record type below:

Case Record Type

[Save](#) [Save & New](#) [Cancel](#)