					Project 1		
					United Solar is a solar panel production and installation company that needs your help to set up their new Salesforce environment. After a meeting with their corporate management, a number of use cases have been identified. We need you and your team in order to implement these features so that the United Solar team can start their work in their new Salesforce environment.		
					Directions: Each associate must choose use cases from a variety of categories (minimum of 3) and complete them. Submit to your trainer this document filled out with the associate assigned to each use case. Each use case is assigned a number of points. In order to receive 100%, you must score 100 points. Each category has a maximum number of points that can come from it. For larger use cases, multiple associates can be put as having responsibility but each associate must have at least 1 use case per category that they are the only one marked down for.		
					Analysis: Before starting work on the project, the team must perform analysis on the use cases. First, an ERD must be crafted to support the needs of United Solar mentioned below. In addition to this ERD, the team must submit a document analyzing the chosen use cases and the best tool to complete the use case. Compare the available tools and select the most appropriate one.		

					United Solar, as mentioned earlier, is a solar panel production and installation company. Their solar panel products are sold to both businesses and households and the sales representatives need to often get in contact with these places. Sometimes, our sales reps get some lead on a potential sale and they like to have that distinguished from the businesses that United Solar has already sold to. Businesses are often repeat customers, and our sales reps also like to have those upcoming deals tracked. Businesses can often pay the entire installation amount up front, but often times households need to pay in installations using payment receipts. In case of issues with the products, United Solar also would like a ticketing system set up. The installation of certain solar panels requires a certification, or multiple. United Solar wants to keep track of the certifications a solar panel needs for installation and which engineers hold that certification. When an installation is requested, it's tracked through a work order. Finally, internal employees, especially engineers, need to be able to make reimbursment requests for expenses when they're on installation.		
	Category	What Assigned Member Did	Completed?	Comments	Use Case	Associate	Points
	Configuration and Setup Max Points: 20						
	currency setup in setup	I went to currency settings and added those currencies, as well as the currency exchange rate based on searching conversion rate online.	Completed	Anthony: NA Abdoul: Brandon: Jason: Miguel:	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.	Brandon	2
	Change Standard Fiscal Year in Setup	I went to fiscal year in setup and change the month	Completed	Anthony: NA Abdoul: Brandon: Jason: Miguel: NA	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.	Miguel	1
	Setup/Security/Session Settings	I went to session settings and new user email change from 7days to 1 day	Completed	Anthony: User Standard Object, no relationships. Abdoul: Brandon: Jason: Miguel	United Solar wants the New User email link to expire in 1 day instead of 7 days.	Abdoul	2

	app manager/different apps for different groups of people			Anthony: NA. For this, we should two Create Role Specific Apps that contain all relevant objects for Engineers and all relevant objects for Support Staff. No impact on relationships. Abdoul: Brandon: Jason:NA Miguel	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.	Miguel	2

	Users,Profiles, Permission Sets, DISABLE USER(S)	Profiles: Engineers: Business Accounts, Certifications, Work Orders, Reimbursement Requests HR: TO DO LAST: CANNOT DO UNTILL ALL CUSTOM OBJECTS ARE MADE Suport Rep: Cases(Support Tickets), Orders, Payment Reciepts, Business Accounts, Household Accounts, Contacts Finance: Solar Products, Work Orders, Business Accounts, Household Accounts, Contacts, Reimbursement Requests, Payment Reciepts Permission Sets for Work Orders, Solar Products, Business Accounts, Household Accounts, Reimbursement Requests, Payment Reciepts, Contacts Permission Set for Lead Engineer for solar Products, Leads, Opportunities Permission Set(?) for Regular Engineers for Household Accounts Permission set for Finance to edit the Status field of payment reciepts	Completed	Anthony: Abdoul: Brandon: Jason:Engineer and lead engineer will be a little tricky, as the base engineer needs access to both business and household accounts, but the lead engineer should ONLY have access to the business account. This means that both the regular engineers and the lead one will (possibly) use different profiles or record types, as both need access to account, but the lead engineer should only be able to see business accounts. Miguel	At the start, United Solar wants 5 users to be able to access Salesforce: 1) Jon is an Engineer who needs to see certifications he holds, work orders he is assigned, and reimbursement requests he has made. He also needs to see all businesses and households. 2) Lisa is the Engineering Lead and needs to see and edit all certifications, solar products, and work orders. She also needs to be able to see all businesses, reimbursement requests, leads and opportunities. 3) Damian is in HR and needs to see all records except certifications. 4) Alexandra is a Support Rep and needs to see and edit support tickets, orders, payment receipts, business and household records, and contact records. She also needs to see all solar products. 5) Cory is in Finance and needs to see solar products, work orders, business and household records, contact records, reimbursement requests and payment receipts. He only needs to see these records and should only be able to edit the "Status" field of payment receipts, which should be one of 3 values: New, Approved, Rejected Don't forget, you are a user as well! You are the Salesforce Admin!	Jason	10

	Miguel hint: user impersonation		Completed	Anthony: NA Abdoul: In the setup menu I will select the profile user and scroll down the menu until I reach login hours and from there, we will change all the days to none which will deny login to the user engineer Brandon: Jason: Miguel:	While still setting everything up, we don't want users to be able to log in. However, you still need to verify security for each user. Make sure that you can log in as that user, but they cannot log in themselves and are not given the chance to login.	Abdoul	2
	Users, Profiles, Login Hours	Setup > Users > Profiles > [Select HR Profile] > Login Hours > (click Edit) > Set weekdays to 9:00 AM - 5:00 PM > (click Save)	Completed	Anthony: NA Abdoul: By selecting the HR profile, we will go to the login hours and adjust the login hours from 9 am to 5 pm for Monday to Friday Brandon: Jason: Miguel	HR should not be able to log in outside of work hours (9:00am - 5:00pm).	Anthony Schultz	1
	Profiles,Security, Password Policies	Step 1: Setup > Users > Profiles > [Select HR Profile] > Password Policies > (click Edit) > Set 'Password Expires in' to 30 Days Step 2: Setup > Security > Password Policies > (click Edit) > Set 'Enforce password history' to 4 passwords remembered > (click Save)	Completed	Anthony: NA Abdoul: Brandon: Jason: Miguel	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.	Anthony Schultz	2
	Setup/Administration/user/uncheck generate password via user email	Setup > Administration > Users > [Add Multiple Users] > Assign Chatter External License > Uncheck 'Generate password immediately and email to user' if selected > Enter 10 generic user names. (Repeat again, only do 5 more user).	Completed	Anthony: NA Abdoul: Brandon: Jason: Miguel	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. You may assign them any name you want, since it will be changed later when United Solar is ready.	Anthony Schultz	2
	Object Manager and Lightning App Builder Max Points: 20						

	Online ERD creation tool		Completed	Anthony: NA Abdoul: Brandon: Jason: Miguel	Implement the ERD. Add in custom fields you think would be useful to track on each object.	MANDATORY, ALL ASSOCIATES MUST ASSIST IN THIS USE CASE	12
	Record types and page layouts		Completed	Anthony: Accounts can be used, just use record types to modify page layout for each type. Abdoul: Brandon: Jason:Record types, page layout Miguel	United Solar sells to both businesses and households. Most of the values are the same between the two, but they would like a way of distinguishing if a business is a household or corporation. Fields not relevant to households should not be displayed for households and fields not relevant for businesses should not be displayed for businesses.	Jason	2
	formula field problem: Payment is not available in Flow	Using the m-d relationship between payment and order through the custom object "Payment Receipt," subtracted the amount from payment from the Amount Owed on Order. Created an additional flow to automatically set the amount Owed on Order to the Order Amount on Order creation	I believe this is done, but it would be great to have it reviewed. Flows "Default Amount Owed to Order Amount" and "Update Amount Owed"	Anthony: Relationship: Payments -> Orders (Lookup) Abdoul: Brandon: Orders / Payment (?) - create a lookup relationship between orders and payment and create a derived field on orders to subtract paid from amount owed Jason: Miguel	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.	Brandon	4
	Profiles, Page Layouts	Clone a new page layout'Engineer business Layout' from business page layout with updated then use for engineer record type	Completed	Anthony: . Abdoul: Brandon: Jason: Miguel	The engineering team only needs to use the following fields on business records, so de-clutter their view of the record: Owner, Name, Phone Number, Fax, Website, Address. They should still have access to these fields, they simply don't need to see them on the record view.	Abdoul	2
	Custom Highlights Panel in App Builder	Lightning App Builder > Highlights Panel > Compact Layouts	Completed	Anthony: NA Abdoul: Brandon: Jason: Miguel: Account	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.	Miguel	2

	add/remove field from list view	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	Completed	Anthony: Abdoul: Brandon: Jason: Miguel: Different List view for each record type	Make it easy to see all the users with certifications and all the products a certification certifies for from a certifications record page.	Anthony Schultz	2
	Sales and Marketing Applications Max Points: 12			Anthony: Abdoul: Brandon: Jason: Miguel			
	formula field?		Completed	Anthony: Abdoul: Brandon: Jason: The opportunity standard object has a lookup relationship to the campaign standard object Miguel	United Solar wants to be able to see if an opportunity is affecting a current marketing campaign from the opportunity record page.	Jason	1

	Path, Record Page Customization	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.	Completed	Anthony: We just need to change the status options to "New, Assigned, Planning, Working, New Estimate Required, Done" in Work Order since Work Order Standard object already had a prebuilt path connected to status field. Abdoul: Brandon: Jason: Miguel	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.	Anthony Schultz	2
	Record level security	Created a flow where all leads with the industry field = "Engineering" are assigned to Lisa. Currently waiting on the Lisa user to be created to finish this use case. (not currently active)	Completed by Brandon (flow not currently active)	Anthony: Abdoul: Brandon: Leads with the industry field "engineering" should be assigned to Lisa Jason: Miguel	United Solar would like all leads from the engineering industry assigned automatically to Lisa.	Brandon	1

	Setup/flow/record-triggered flow	Step 1: 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: Setup > Users > Permission Sets > New Permission Set > Custom Metadata Types Access > Edit > Find Custom Metadata Type > Enable The Custom Metadata Type > Save. Step 3: 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.	Completed	Anthony: Executed this through a flow that collects all emails stored in metadata, concatinates them into comma seperated list, then sends an email all users on that list when trigger described occurs. Admin simply has to add or delete emails from relevant metadata type in order to modify receipients. Abdoul: Brandon: Create a flow with the condition of opportunity amount > 500,000 and percentage > 75%, use a user group for the list to email, so the delegated admin only has to change the user group, not the flow Jason: Miguel	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.	Anthony Schultz	2

		Create a Premier Discounts Price Book. 1. Enable Orders & Allow Negative Quantities in Setup 2. Modify Opportunity Product object layout to include Discount field 3. Appy FLS to discount field so that only certain profiles have access to it. TODO: Who has edit access?Finance? Sales? Marketing? Need to give everyone else Read access?	Completed	Anthony: Create two Price Books, one standard and Premier. Abdoul: Brandon: Maybe create a flow that creates a new price book entry for every price book entry that has a 15% discount Jason: Miguel	United Solar would like a premier set of prices for their products that are at a 15% discount.	Miguel	2
	Set up custom paths	setup > paths	Completed	Anthony: Abdoul: Brandon: Jason: Miguel	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 contributue to the pipeline until won.	Miguel	4
	Service and Support Applications Max Points: 11			Anthony: Abdoul: Brandon: Jason: Miguel			

	flow	Create a flow where if a support ticket (Case, though not currently sure what defines it as a support ticket) has the status of New for days, it will be escalated and assigned to Alexandra (as alexandra is not currently implemented, currently being sent to the salesforce six user, which is us) (also not currently active)	Completed by Brandon (flow not currently active)	Anthony: Abdoul: Brandon: create a work flow to escalate the support ticket and assign it to Alexandra Jason: Miguel	United Solar wants support tickets that have had a "New" status for over 2 days to be escalated and assigned to Alexandra.	Brandon	2
	Queues, Assignment Rules	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	Completed	Anthony: Abdoul: Brandon: Jason: Miguel	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 Perfomance, they would like it automatically assigned to Alexandra though.	Anthony Schultz	3
	Setup/flow/record-triggered flow		Completed	Anthony: Abdoul: Brandon: Jason: Miguel	United Solar would like to send an automated email when a customer submits their ticket and when the ticket changes status to "Accepted".	Abdoul	3

	email to case	Setup >Email-To-Case>click new in routing address>choose email address to and case owner	Completed	Anthony: Abdoul: Brandon: Jason: Miguel	United Solar would like all emails sent to a specific email address to be made into a case. They don't have the email set up right now, so just use your own email until then.	Abdoul	2
	Salesforce Knowledge			Anthony: Abdoul: Brandon: Jason: Miguel	United Solar wants to ensure that the expert understanding of certain tickets are available for all their support reps, so they would like a place for their experts to write and share this information. To organize things, they want these articles to be divided into 4 categories: Missing Part, Installation Error, Capacitor Overheat, and Faulty Charge Capture. Write a placeholder article for all of these categories.	OPTIONAL?	8
	case status, support processes		Completed	Anthony: Abdoul: Brandon: Jason: Status field on Case standard object Miguel	United Solar uses a unique process for working through support tickets. Their process uses these steps: New > Accepted > In Progress > Delayed > Closed (Success) > Closed (Failed)	Jason	3
	Productivity and Collaboration Max Points: 7			Anthony: Abdoul: Brandon: Jason: Miguel			
	Branding,Mobile Publisher			Anthony: Abdoul: Brandon: Jason: Miguel	United Solar would like their mobile branding to match their company colors: #E92425 as a brand color and #FFBE58 as a loading page color with the United Solar logo on the loading page.	Abdoul	2
	public calendars date fields and relationship fields	This works out of the box		Anthony: Abdoul: Brandon: Assign Certifications and Work Orders to calendar and use the Related To field on Task to relate the calendar event to the task. Jason: Miguel	United Solar would like for Certifications and Work Orders to be able to be put on calendars and have tasks related to them.	Miguel	2
	broadcast group		Completed	Anthony: Abdoul: Brandon: Jason:chatter broadcast group Miguel	The CEO of United Solar would like a place in Salesforce to make announcements to the entire company.	Jason	3
	Data and Analytics Management Max Points: 14			Anthony: Abdoul: Brandon: Jason: Miguel			

	https://docs.google.com/document/d/11pnmwFoKTMWHa988W6mQ9x7CrmpxLTGqp3d7pnSULsw/edit?usp=sharing		Completed	Anthony: Abdoul: Brandon: Jason: Miguel	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.	Brandon	2
	validation rules		Completed	Anthony: Abdoul: Brandon: Jason: validation rule on Orders custom(?) object Miguel	The Next Payment Due Date field on Orders should always be in the future when being set.	Jason	2
	validation rules		Completed	Anthony: Abdoul: Brandon: Jason: Miguel	The Payment Amount on a Payment Receipt should never be more than the remaining amount to be paid on an Order.	Anthony Schultz	2
	Reports, Workflow Rules, Process Builder		Completed	Anthony: Abdoul: Brandon: Something with reports Jason: Miguel	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 reimbursments	Brandon	8
	Reports, Workflow Rules, Process Builder		Completed	Anthony: Abdoul: Brandon: Jason: Miguel	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. For example, if $100 is charged but only $85 have been paid, Lisa would like to know	Anthony Schultz	3
	Workflow/Process Automation Max Points: 16			Anthony: Abdoul: Brandon: Jason: Miguel			
	approval proceess?		Completed	Anthony: Approval Proccess Abdoul: Brandon: Jason:approval process(as of 3 am 4/19/2024 we have not done this as a class/batch yet) Miguel	United Solar would like each reimbursment request to go through approval first by the manager of whoever created the request, and then a member of Finance.	Jason	3
	Schedule-Trigger Flow / action build	Name of flow --hot account type thank you email set up Org-wide-addresses and Process User Email in Setup	Completed	Anthony: Abdoul: Brandon: Jason: Miguel	Every month, United Solar would like to send out a thank-you email to their hot rated businesses.	Abdoul	5

	create Custom object "Installation Payment", then use Process Builder to send an email when the due date field is in 2 days		completed by miguel	Anthony: Abdoul: Brandon: Jason: Miguel	When the Next Payment Due Date is in two days, a contact from the business that made the order should be emailed a reminder	Miguel	5
	process builder		Completed	Anthony: Abdoul: Brandon: Email Template with Flow Jason: Miguel	An engineer should be emailed when they are assigned to a work order	Brandon	3
							105
					Presentation: Each associate will take part in a presentation that covers all of the use cases completed as a showcase. Make sure to cover every use case and how it was completed. Note that some use cases are better suited to a live demo than a powerpoint presentation.		

					Scoring: **Your grade will be divided into 4 categories: Group, Individual, Presentation, and Agile. The point breakdown and what contributes to the points are as follows:** **Group: 50 points** **- Your group score is determined by all group members' completion of the assigned use cases. Completing all assigned use cases will earn your group 50 points in this category. Completing half (50 use case points) earns 25 points and so on.** **Individual: 25 points** **- Your individual score is based on the percentage of use cases you completed vs what you were assigned. If you completed all assigned use cases to you, you will get 25 points. If the amount of use case points completed is heavily skewed to a single member, the member that it was skewed away from (completed fewer use case points) will be penalized. This is to ensure that everyone does roughly the same amount of work.** **Presentation: 20 points** **- Your presentation score is based on the quality and accuracy of your presentation. Ensure you use good presentation techniques as discussed in class and make it interesting while still covering all the information that it needs to. Stay within the time limit.** **Agile: 5 points** **- Your agile score is based on the consistency and quality of your standup notes, kanban board and adherence to the scrumban agile framework.**	Salesforce Documentation	
					Advice: **- Make sure to work as a team. No one person can complete the project alone, but by working together you will better understand what each member is doing.** **- Follow these general steps to solve a problem:** **1. Try and solve it yourself.** **2. Search online for the answer; put emphasis on going to the official Salesforce documentation first.** **3. Reach out to your team for assistance. Explain your problem clearly, including what you are trying to do and what you have attempted so far.** **4. If after an hour or so your team can still not solve the problem, reach out to your trainer for assistance.** **- Get started early. You may find that you do not know enough information for some use cases until later, but there will always be some work that you can complete.** **- Some solutions to use cases will require you to do outside research, since we will not cover them in class. Your analysis step should reveal which use cases these are.**		