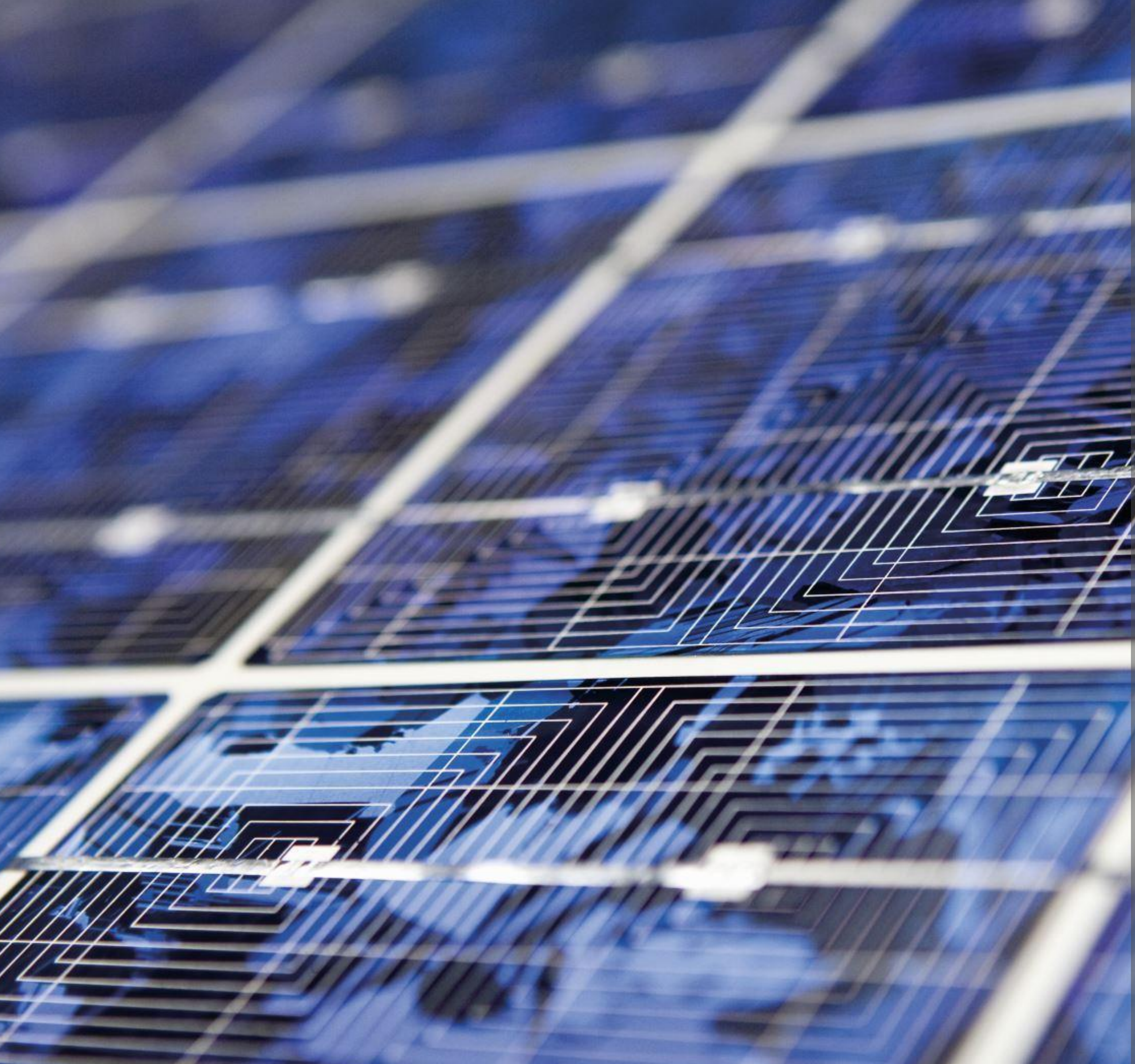


United Solar's Salesforce Implementation

Streamlining workflow and driving sales growth

Project Overview

The Company:

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

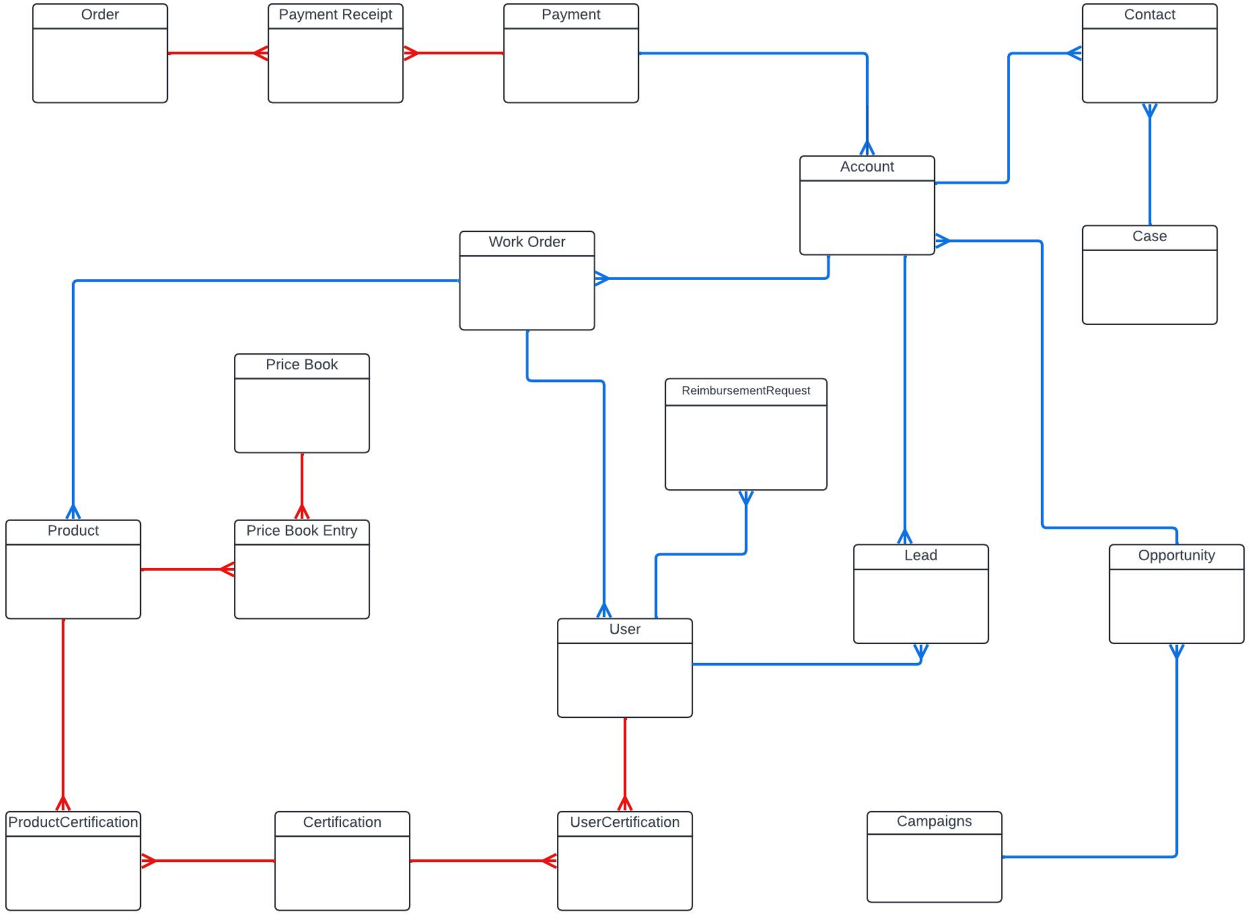
Our Goal:

- 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


Order
Payment Receipt
Payment
Contact
Account
Case
Work Order
Price Book
ReimbursementRequest
Product
Price Book Entry
Lead
Opportunity
User
ProductCertification
Certification
UserCertification
Campaigns

Miguel Use Cases

Fiscal Year Setup

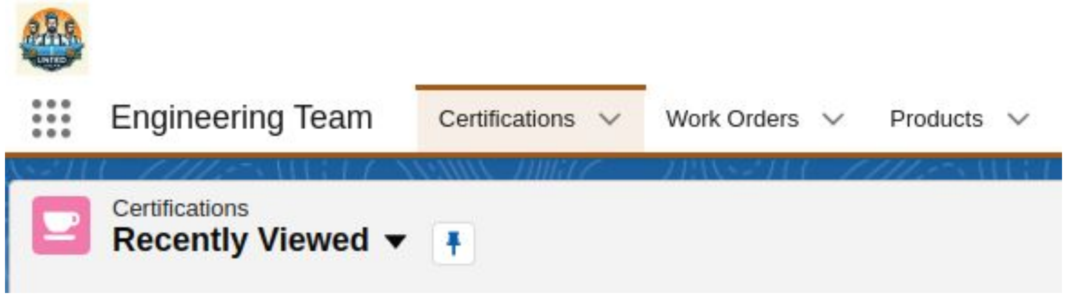
Use Case:

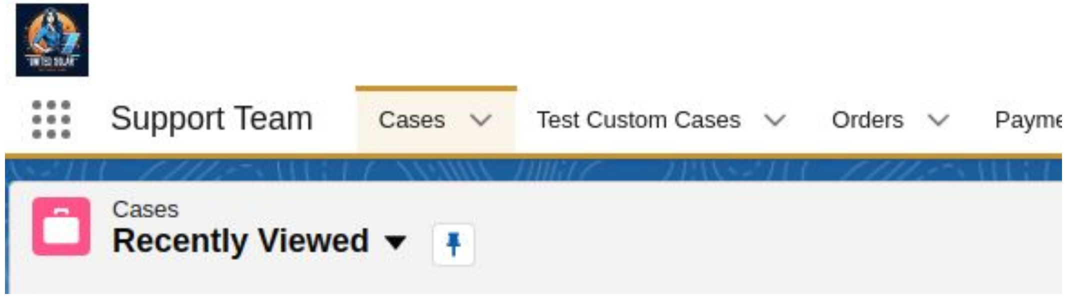
United Solar's fiscal year begins in February, but is otherwise the same as a normal fiscal year. They would like this reflected in Salesforce.

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.

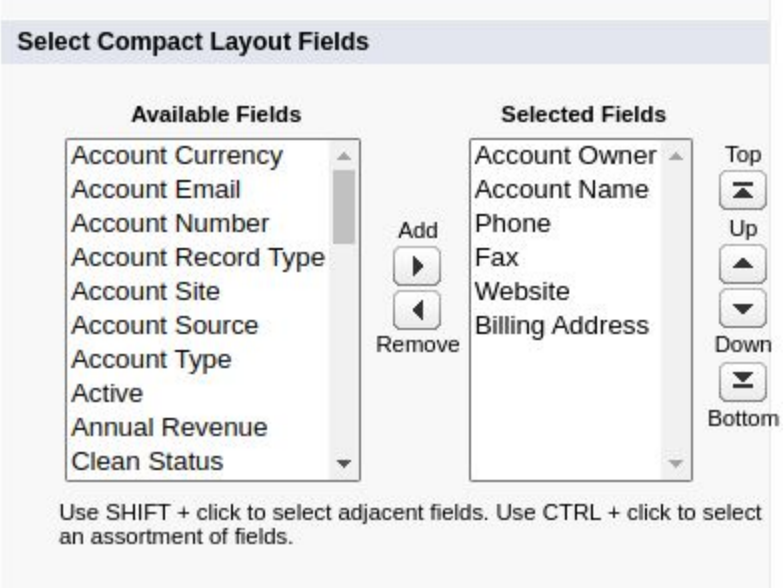
Solution:

Setup > App Manager > New Lightning App

Engineering Team

Support Team

Lightning App Builder / Highlights Panel



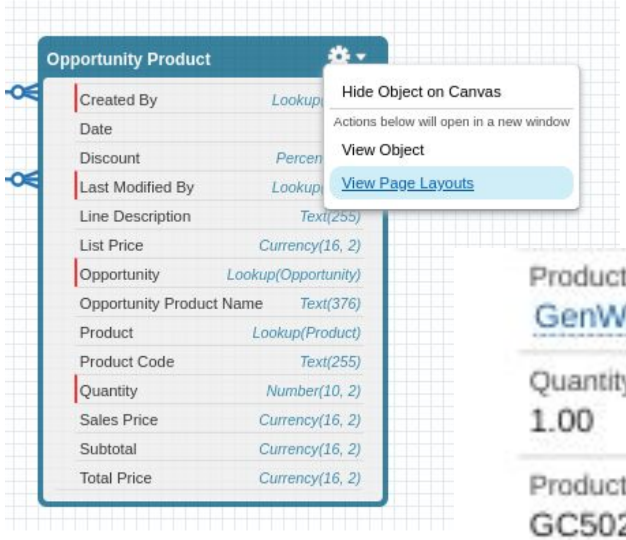
Use Case:

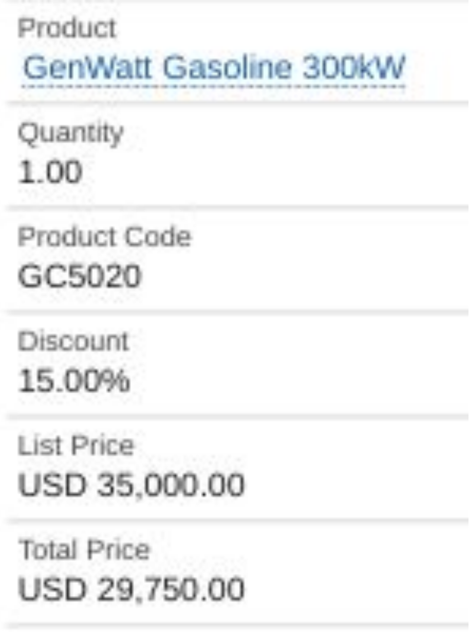
For business records, Owner, Name, Phone Number, Fax, Website and Address are all commonly used fields. United Solar wants them to be displayed in the most convenient place so that they are visible at all times on the record page.

Solution:

Lightning App Builder > Highlights Panel > Compact Layouts

Premier Product Discounts





Use Case:

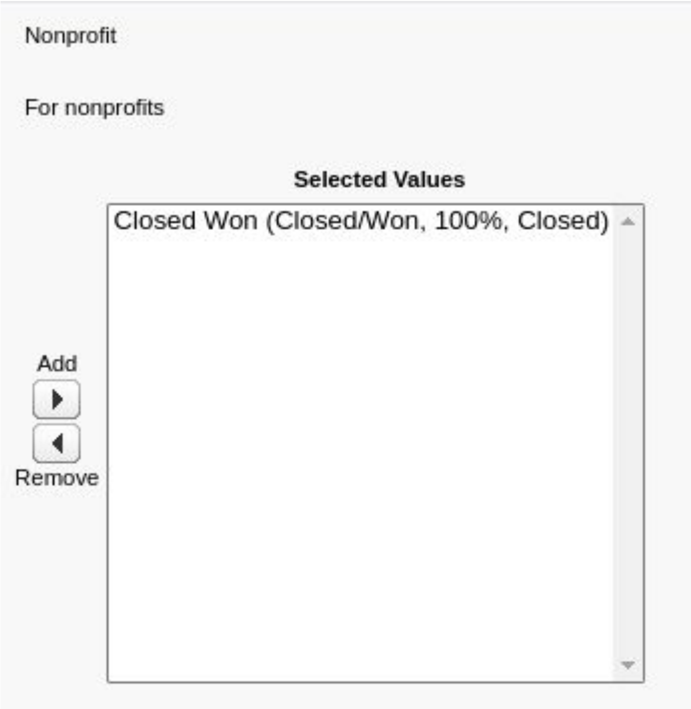
United Solar would like a premier set of prices for their products that are at a 15% discount.

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. Appy FLS to discount field so that only certain profiles have edit access to it.



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

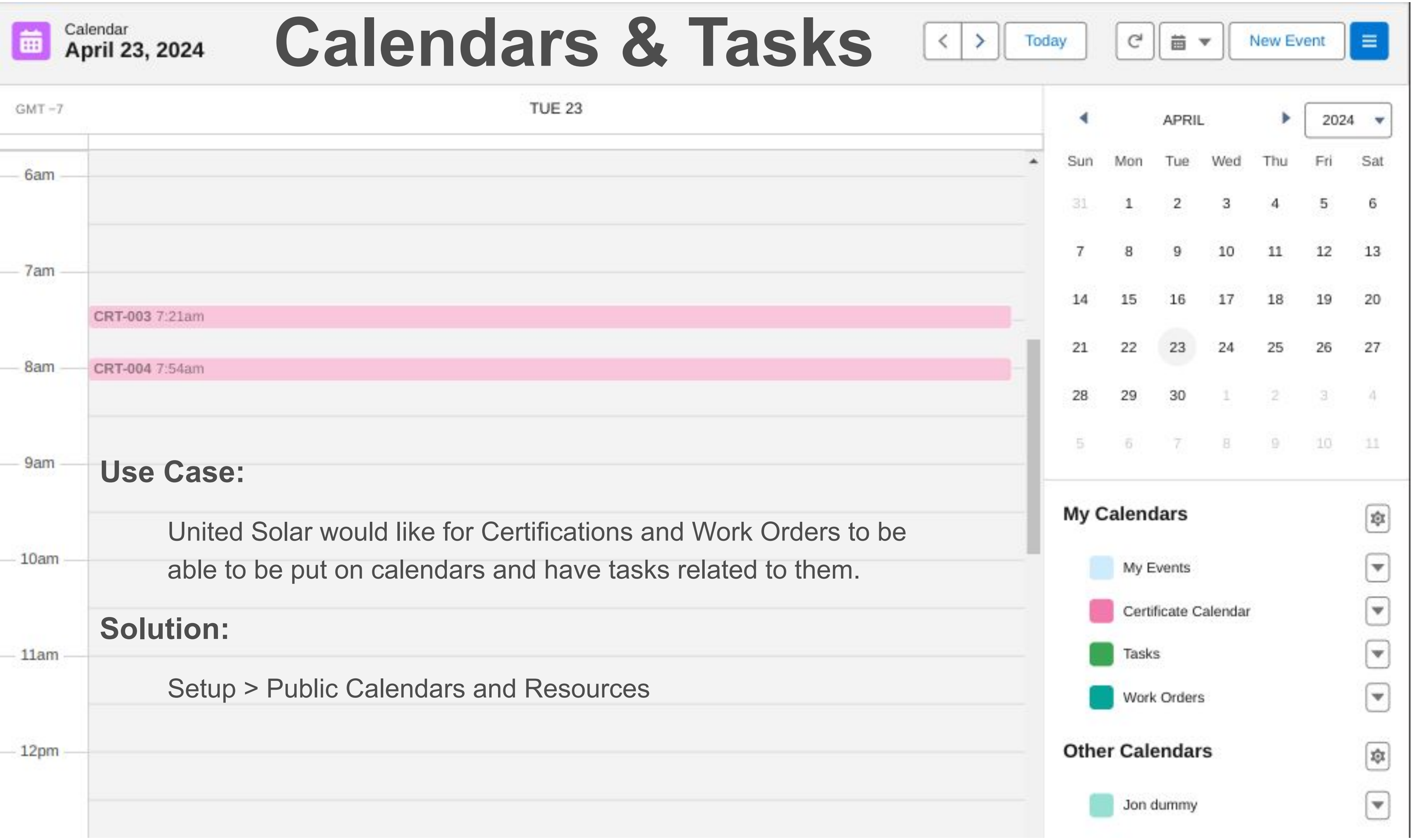
- United Solar does some work for charities for heavily reduced cost. They would like these opportunities tracked using the same process as Salesforce's default, but they would like all forecast categories changed to omitted except for Closed Won, so that they don't contributue to the pipeline until won.

Solution:

Setup > Sales Processes

- Edit Opportunity Path Stages
- Separate Sales Processes

Calendars & Tasks



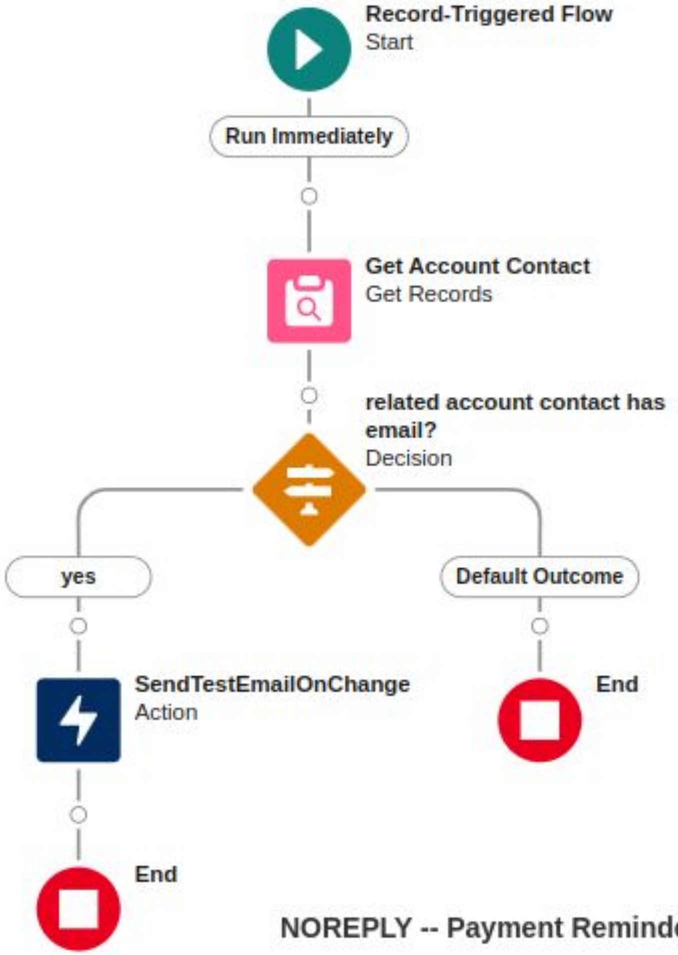
Use Case:

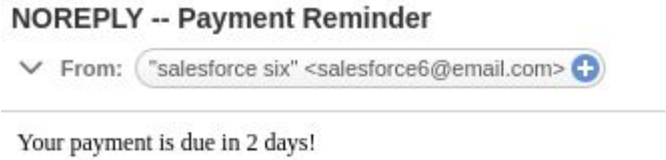
United Solar would like for Certifications and Work Orders to be able to be put on calendars and have tasks related to them.

Solution:

Setup > Public Calendars and Resources

Schedule-Triggered Flows





Use Case:

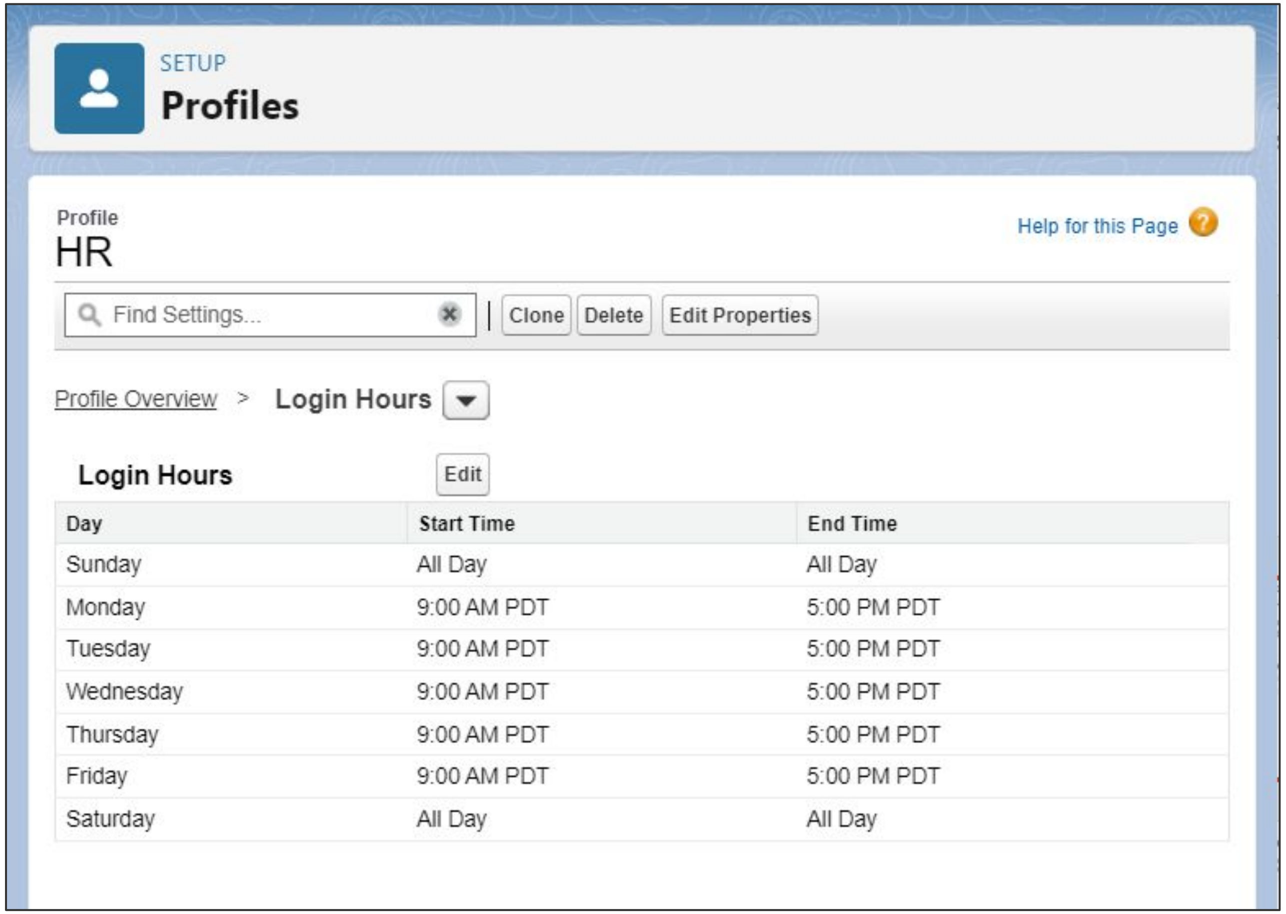
When the Next Payment Due Date is in two days, a contact from the business that made the order should be emailed a reminder

Solution:

Setup a schedule-triggered flow

Anthony Use Cases

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



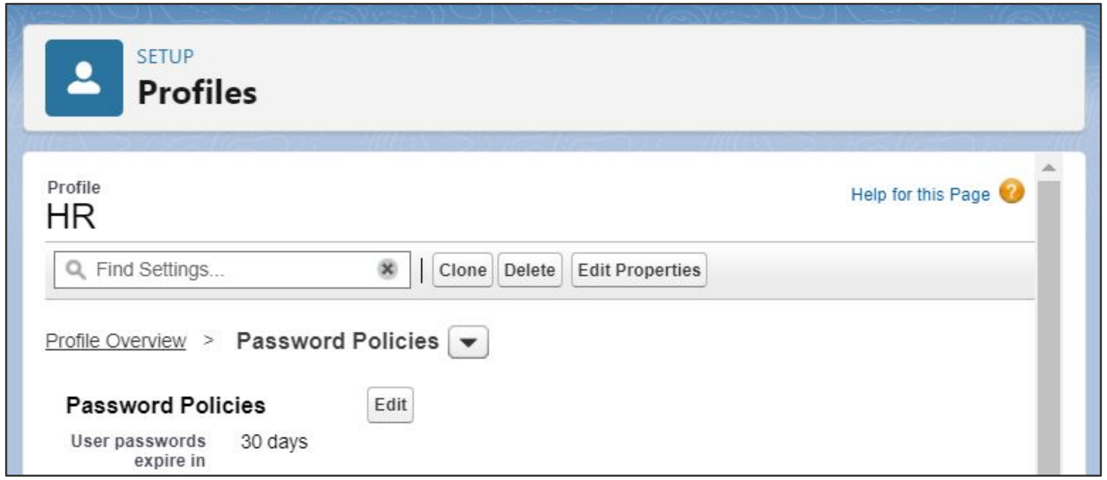
Use Case:

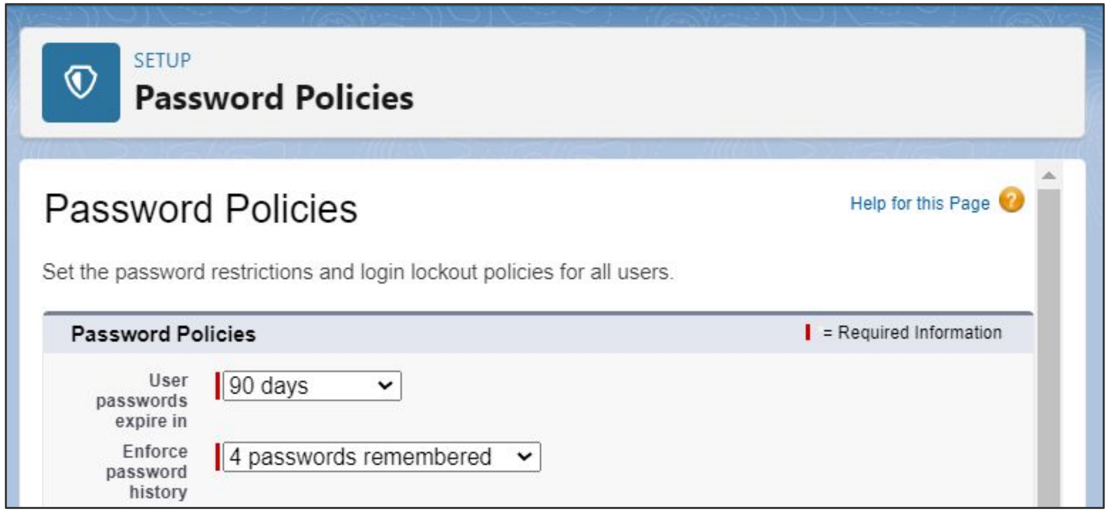
"HR should not be able to log in outside of work hours (9:00am - 5:00pm)."

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:

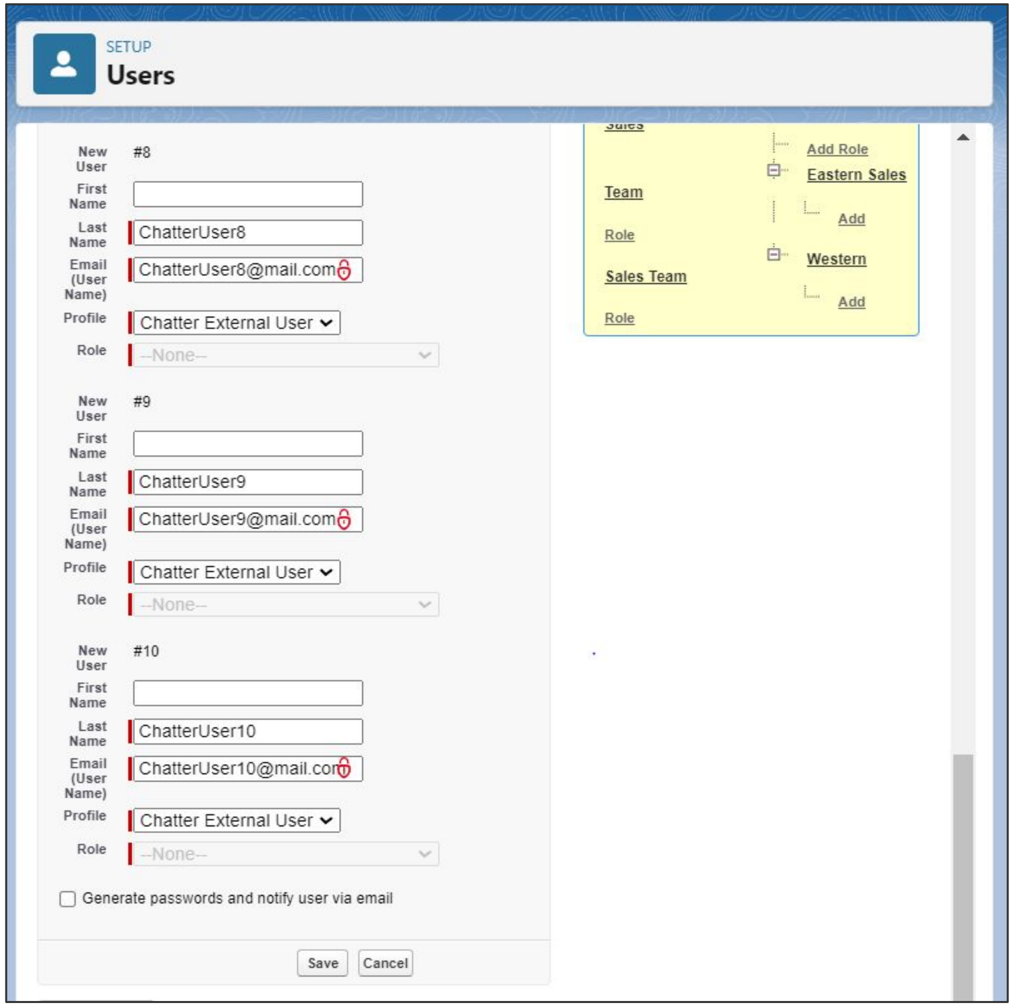
"United Solar wants to make sure the sensitive data accessible by HR representatives remains secure. In order to accomplish this, they request that HR passwords should expire every 30 days. They also want all users to have the last 4 passwords remembered when setting a new password."

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)



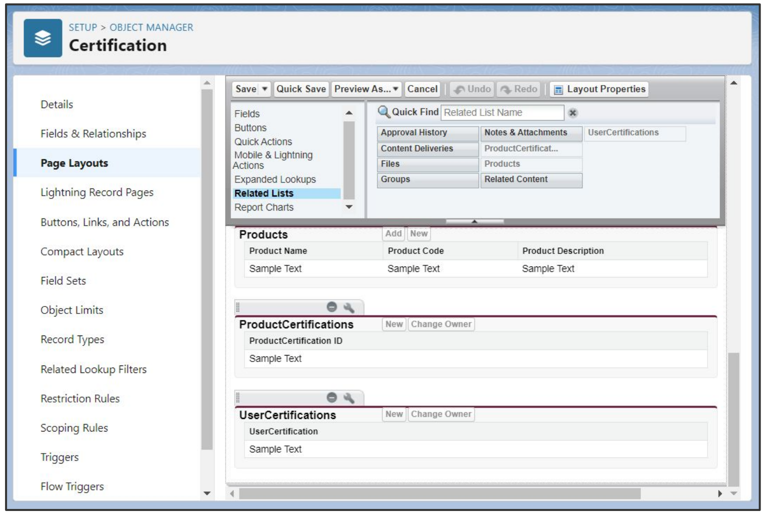
Use Case:

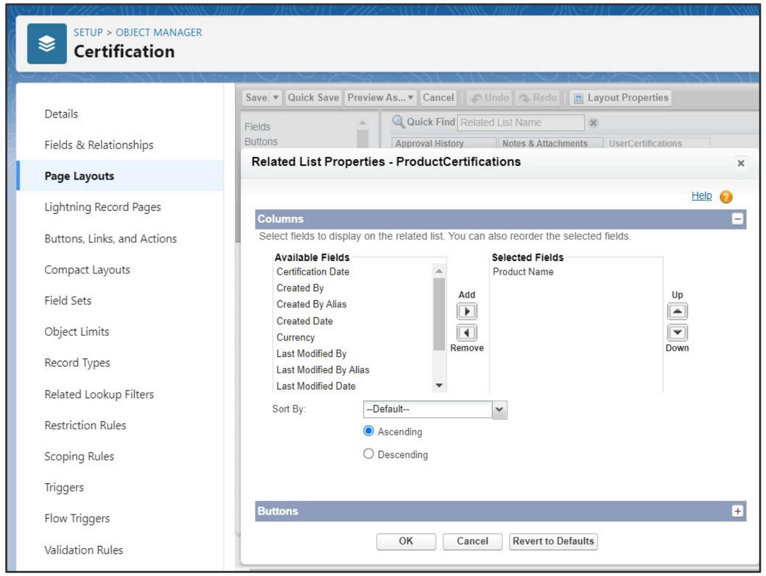
"United Solar wants to have 15 users with the Chatter External license for their partners. However, they do not want them to be able to log in yet, so make sure they don't get sent a password."

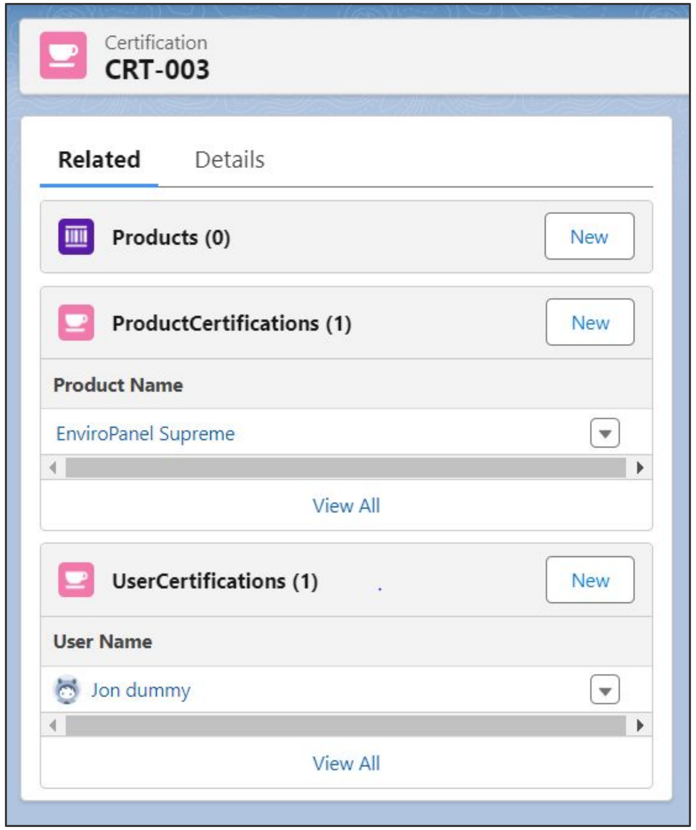
Solution:

(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:

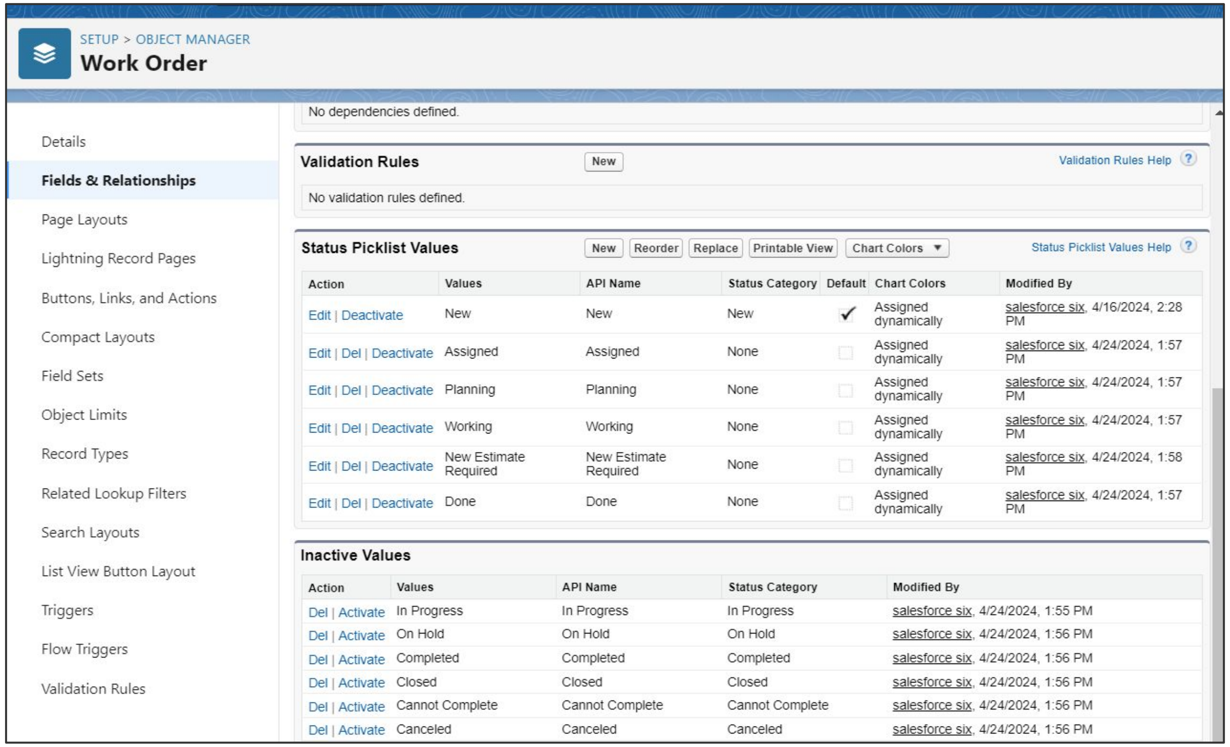
Step 1 (Adding Related Lists to Certification Record Page):

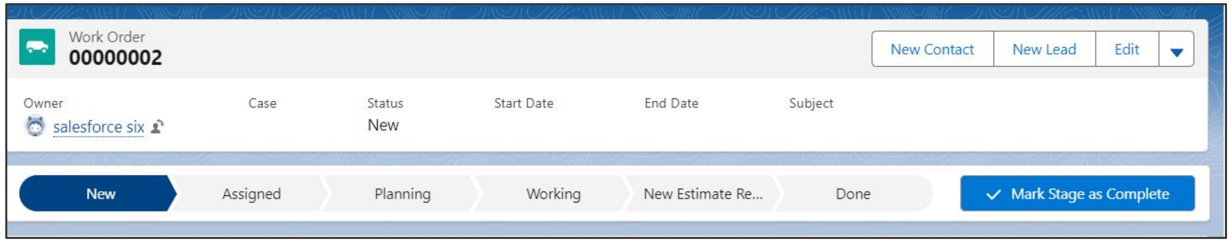
Setup > Object Manager > Certification > Page Layouts > [Select Page Layout] > Related Lists > Add 'UserCertifications' and 'ProductCertifications' > Save

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)





Use Case:

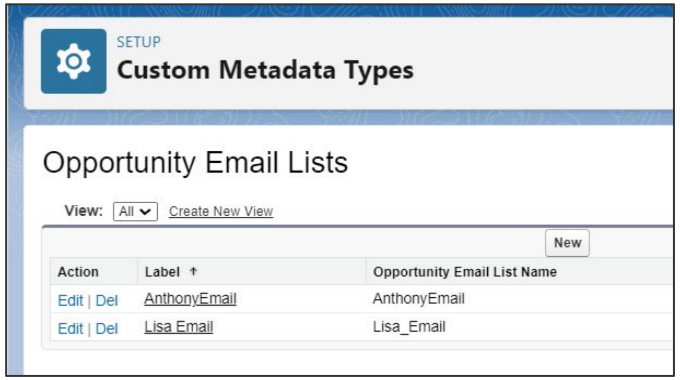
"For work orders, United Solar uses the following process to track progress on them: New > Assigned > Planning > Working > New Estimate Required > Done United Solar wants this process displayed prominently on a work order record page, ideally as some kind of banner."

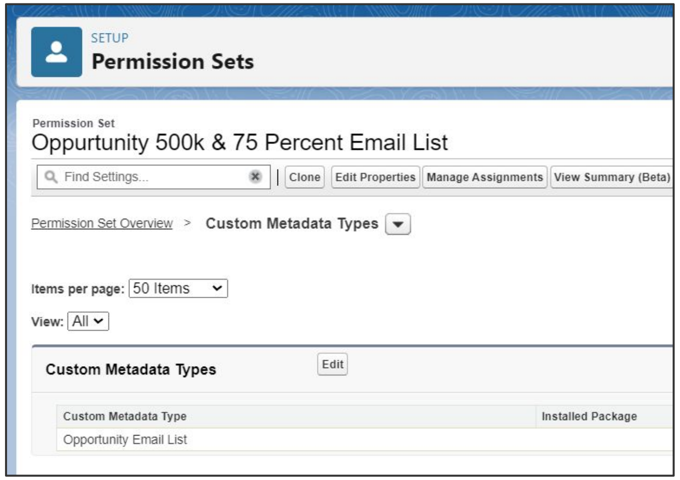
Solution:

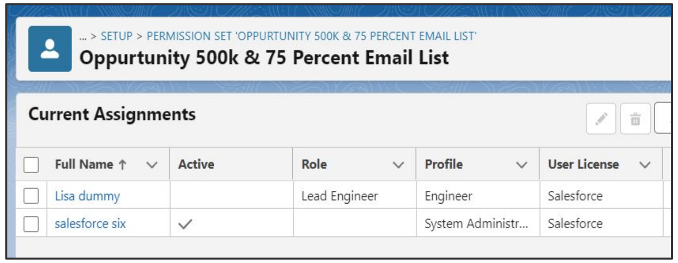
(Customize Work Order Status Field): Setup > Object Manager > Work Order > Fields & Relationships > Status > Edit > Remove default status fields > Add Status Values ('New', 'Assigned', 'Planning', 'Working', 'New Estimate Required', 'Done') > Save.

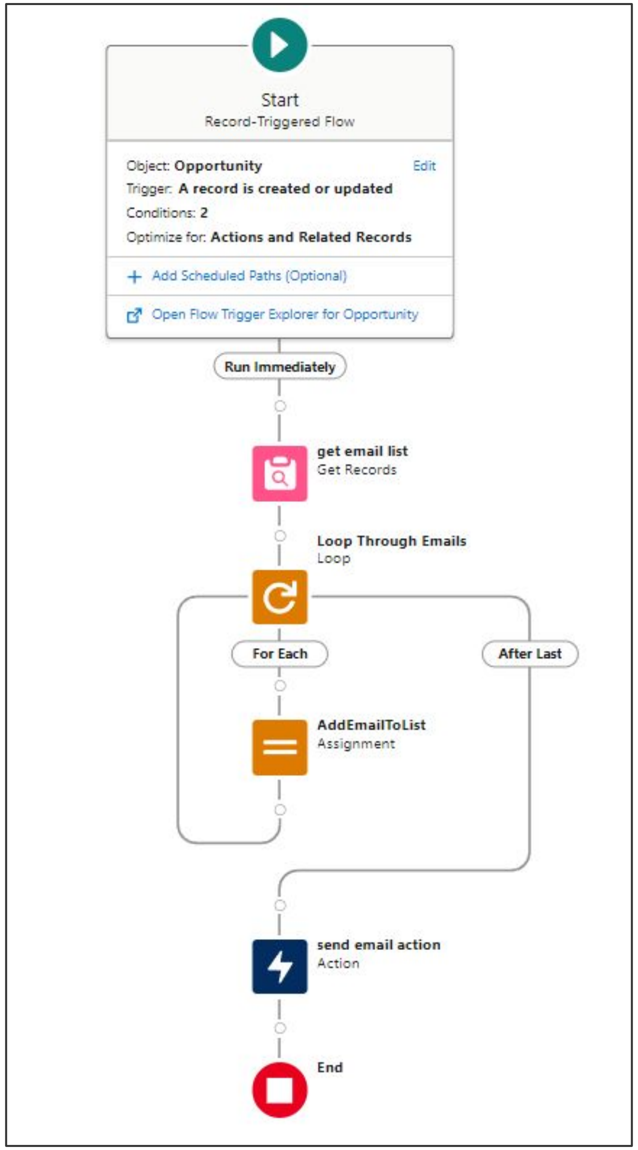
Note: Work Order standard object already comes with a path (banner) for status by default. If it did not, I would have also had to create a path in lighting app builder for this page to make the path (banner) and display it on the page.

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."

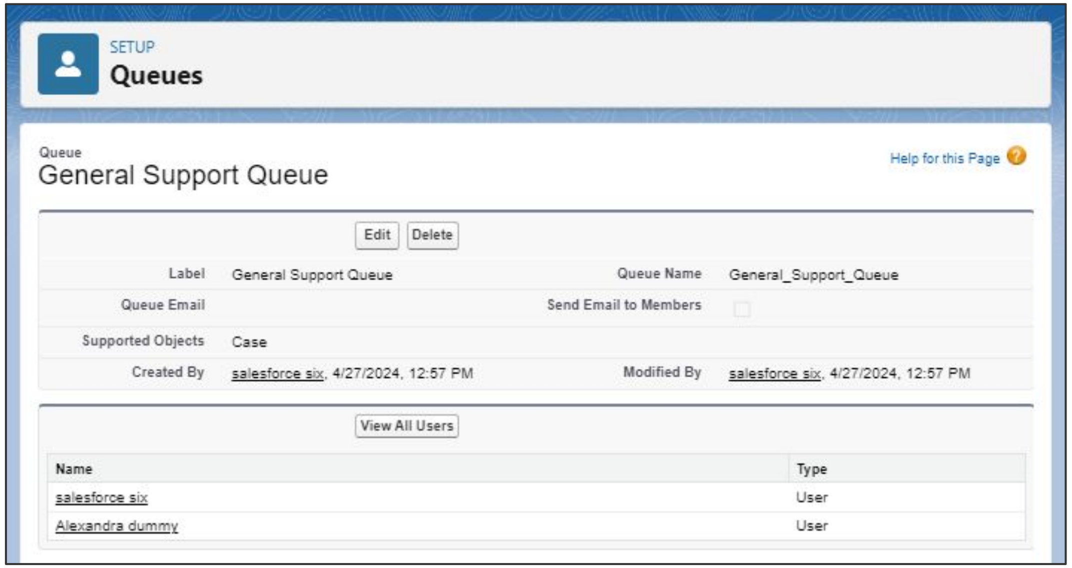
Solution:

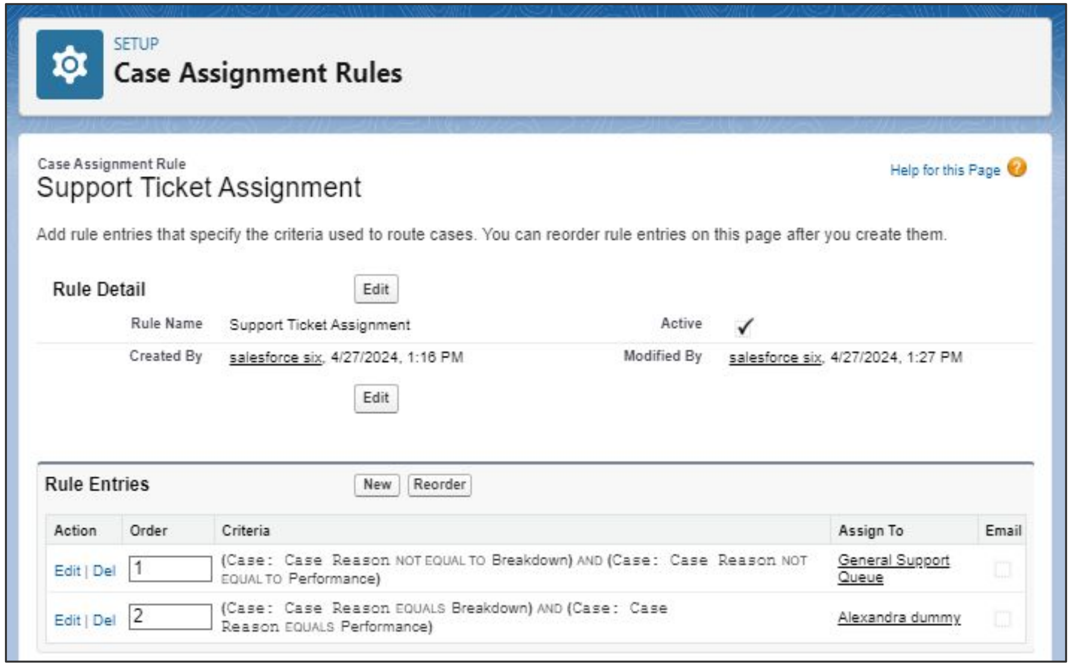
Step 1 (Create and Configure Custom Metadata Type) : Setup > Custom Code > Custom Metadata Types > New Custom Metadata Type > Enter necessary details and Save > Add Custom Fields > New Field > Choose Field Type (e.g., Email) > Enter Field Details and Save > Manage Custom Metadata Type > Add Records >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





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:

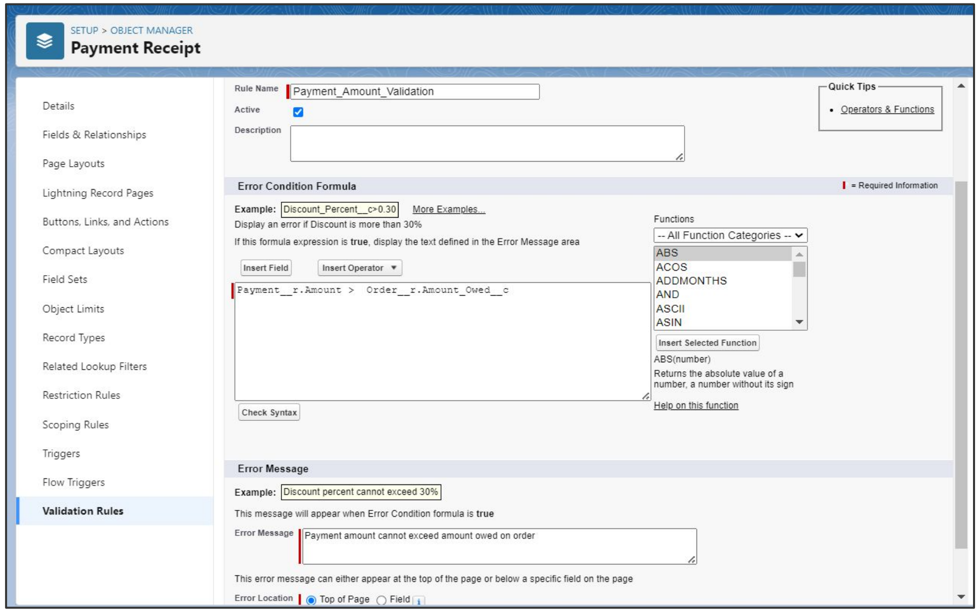
Step 1 (Setup the Queue and its Members):

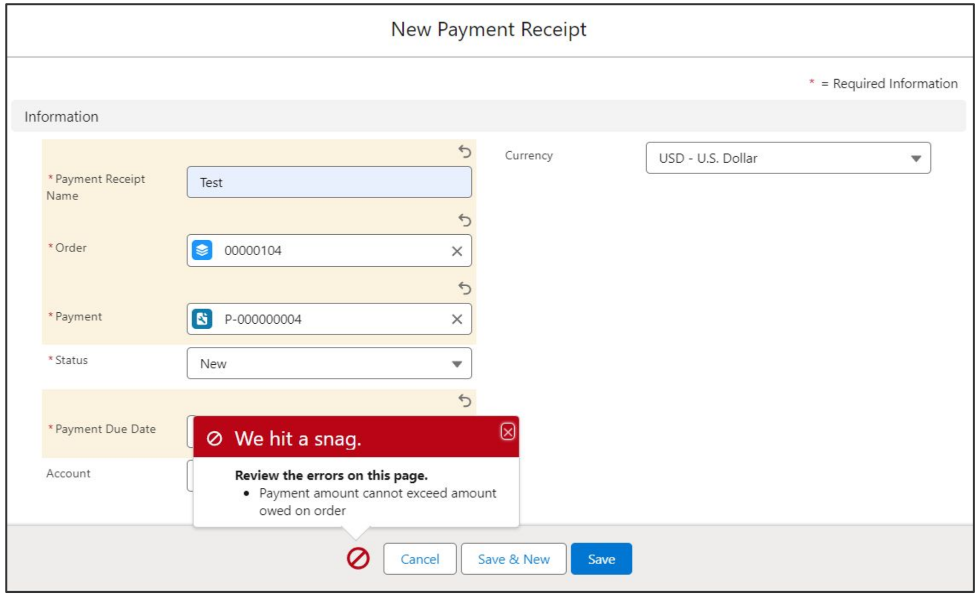
Setup > Users and Access > Queues > New Queue > Queue Name: General Support Queue > Supported Objects: Choose Cases > Queue Members: Add admin, Alexandra > Save

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)





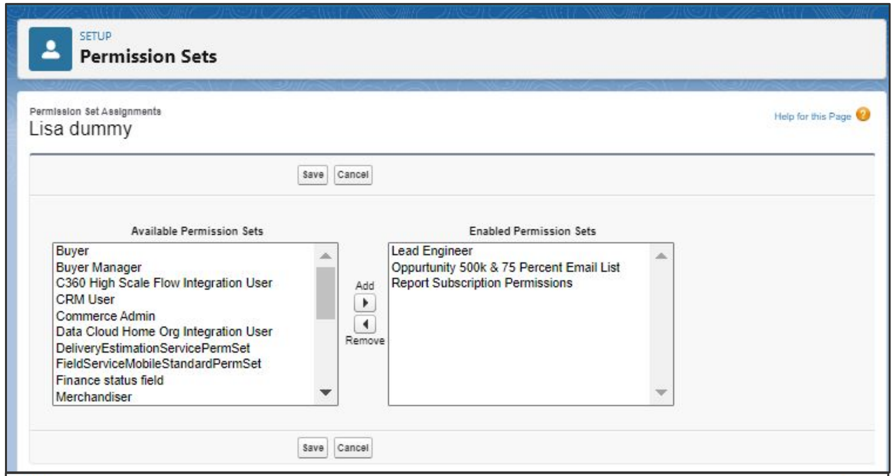
Use Case:

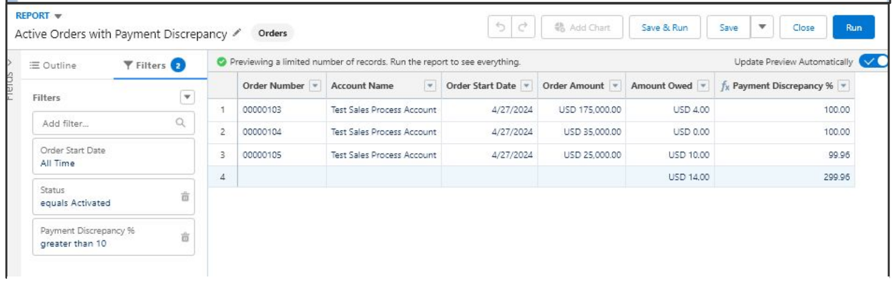
"The Payment Amount on a Payment Receipt should never be more than the remaining amount to be paid on an Order."

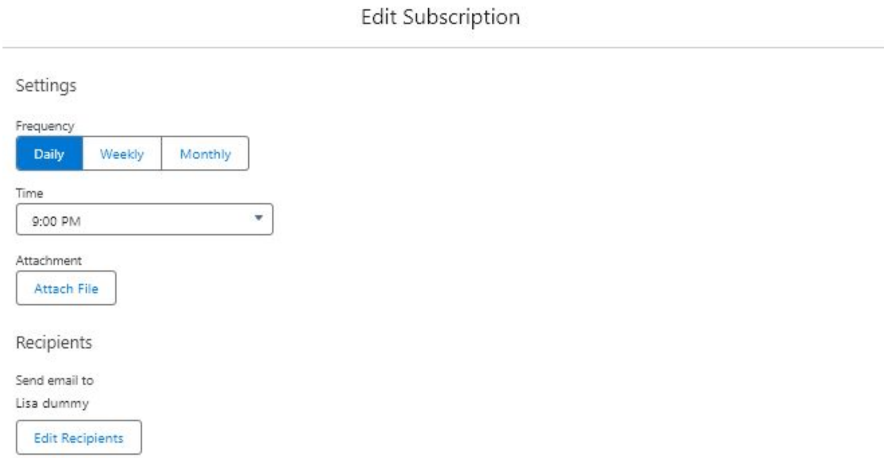
Solution (Create Validation Rule on Payment Receipt Object):

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.

Active Order Monitoring Report Adjustments (3 Points)







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: (ORDER_TOTAL_AMOUNT - Order.Amount_Owed__c) / 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.

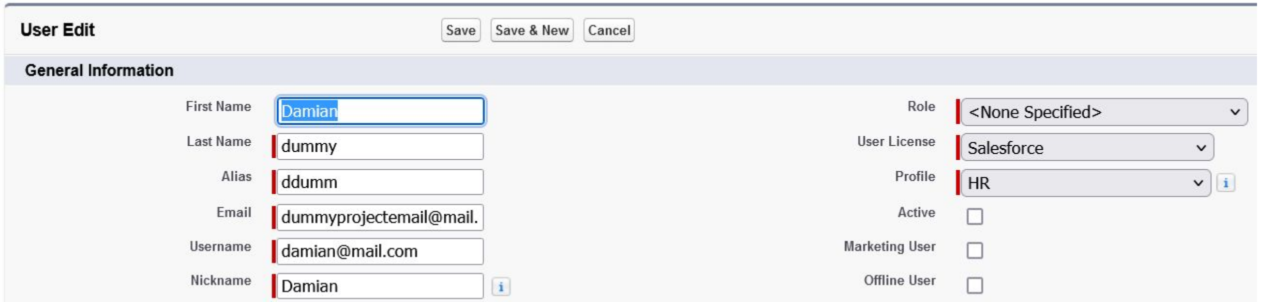
Jason Use Cases

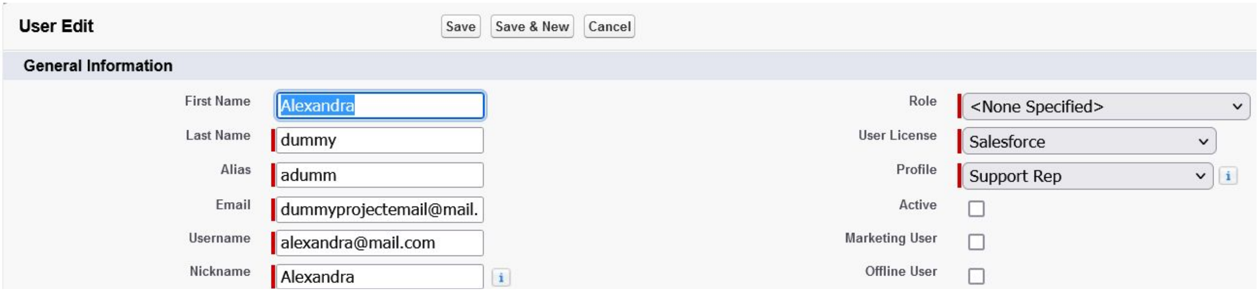
Profiles


mation
= Required 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


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 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 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


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

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	☐	154.290000	2	salesforce six, 4/17/2024, 11:32 AM
Edit | Deactivate	KRW	Korean Won	☐	1,380.900000	2	salesforce six, 4/17/2024, 11:31 AM
Edit | Deactivate	USD	U.S. Dollar	✓	1.000000	2	salesforce six, 4/17/2024, 11:26 AM

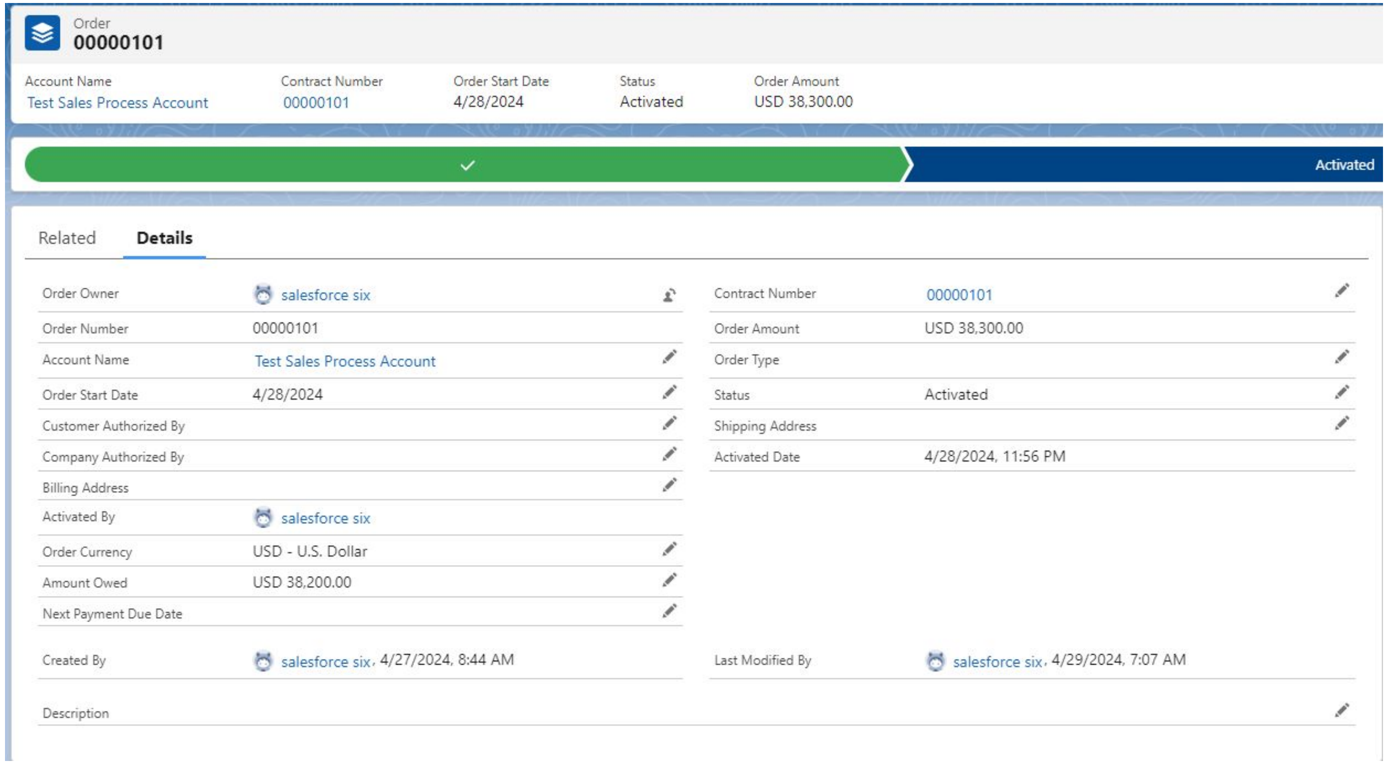
Use Case:

"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)



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."

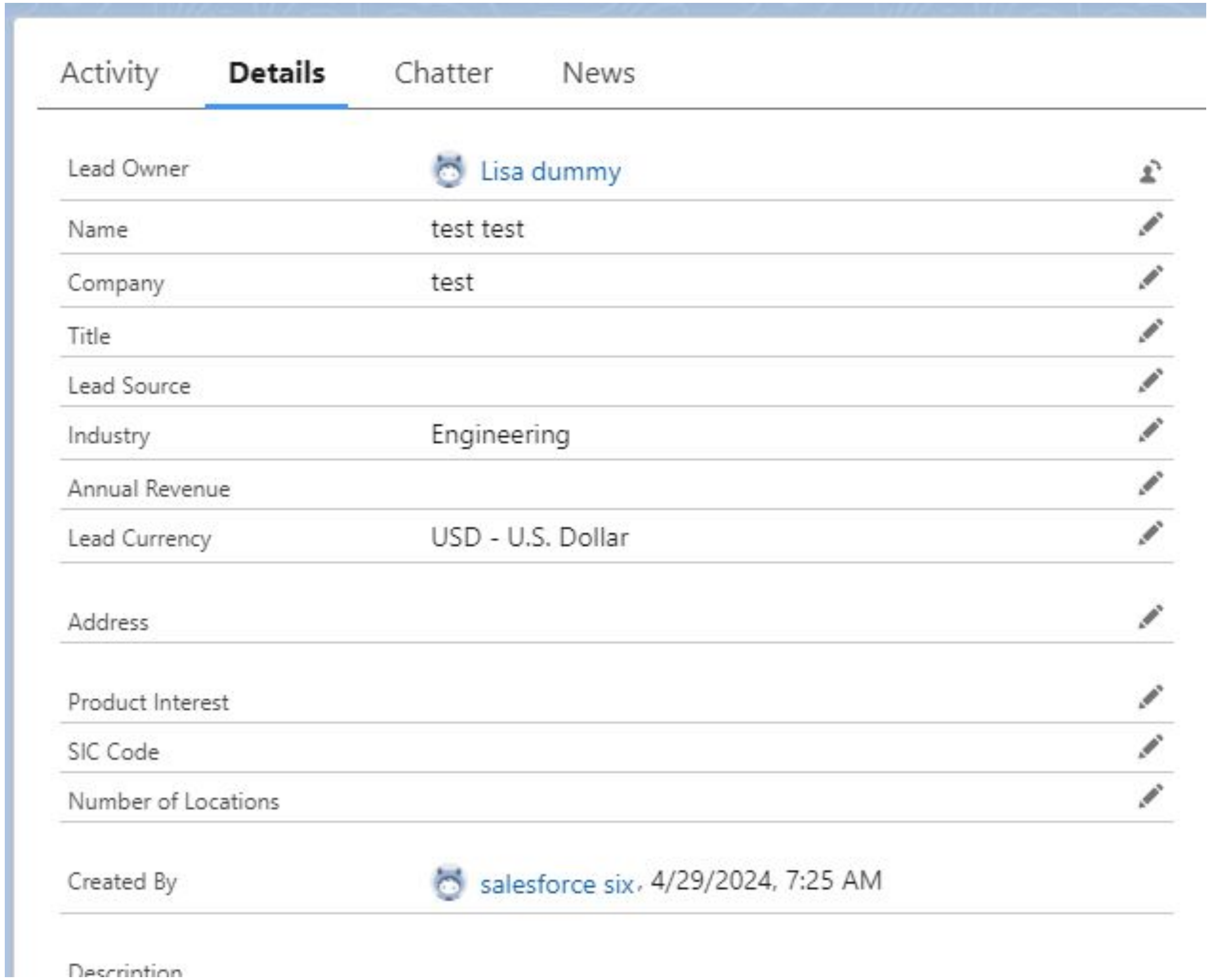
Solution:

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)



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.

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."

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

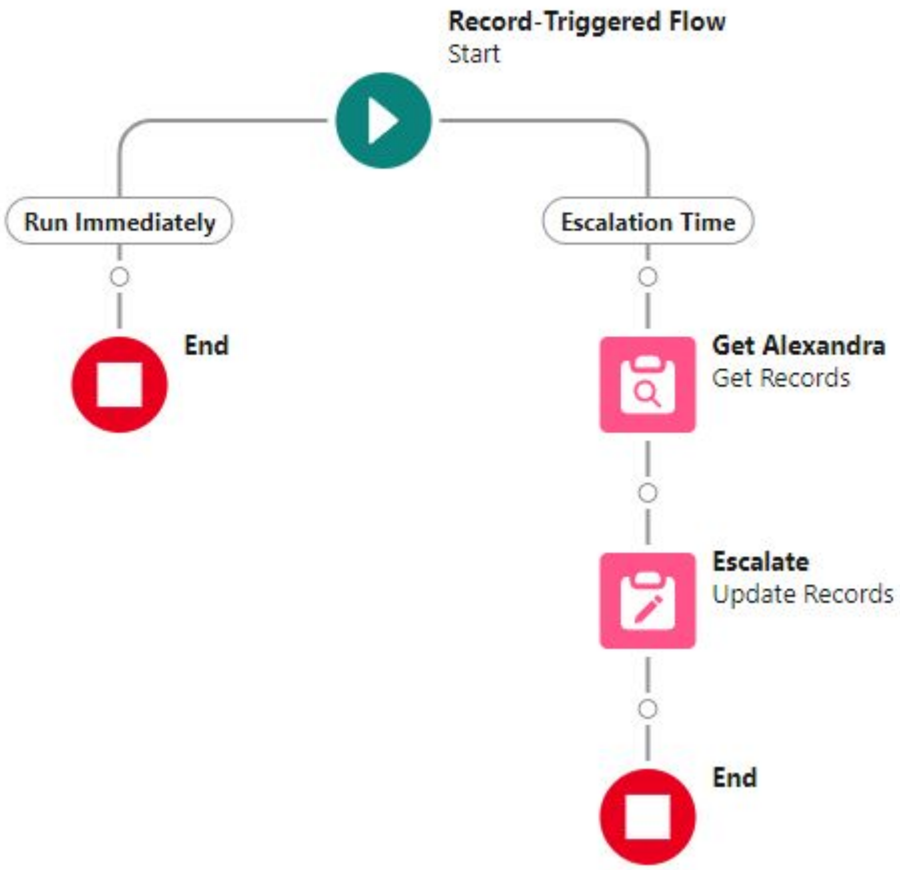
Cons:
- Only works with custom objects and some standard objects
- May not be suitable for large data volumes due to it being limited to exporting up to 50,000 records per report
- Can only be used every 7 days

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

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
Recent
Created by Me
Private Reports

Name	Description	Folder
Show amount owed on active order		Finance Team Reports
Reimbursement amount spent		Finance Team Reports
Hot businesses grouped by country		Finance Team Reports

Report: Orders
Show amount owed on active order

Total Records: 6
Total Amount Owed: 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:

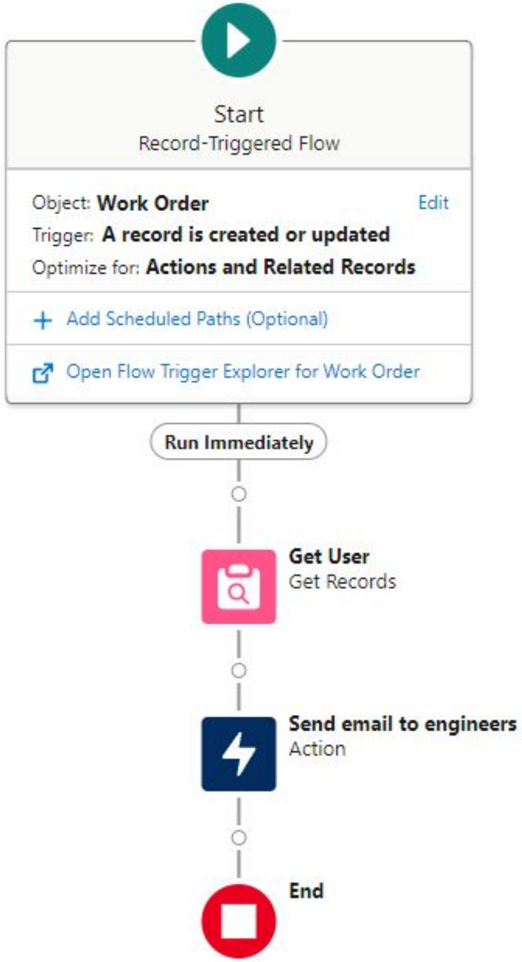
"The Finance team would like to have a place to see several reports easily. Here are the reports that they would like:

- 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:

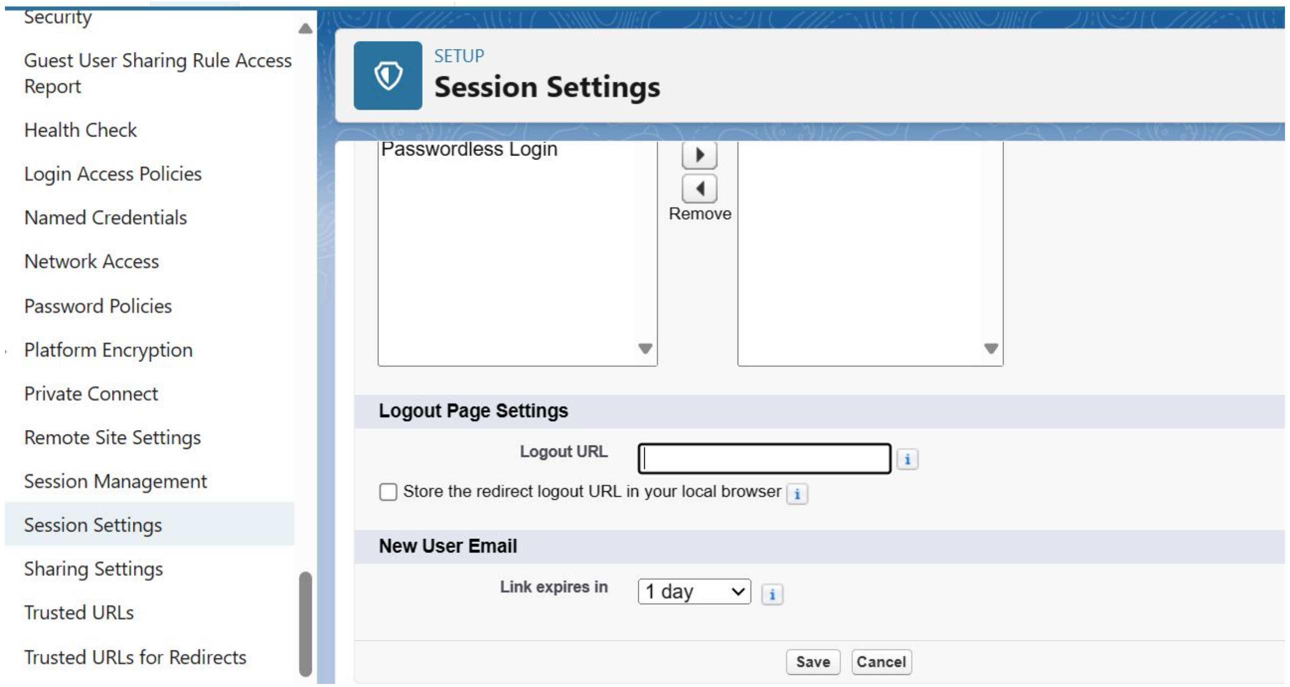
Create a flow triggers on work order on creation and update that grabs the user that is assigned, with a requirement of the user role being engineer, then create an action that sends an email template to the user using their user id.

Abdoul Use Cases

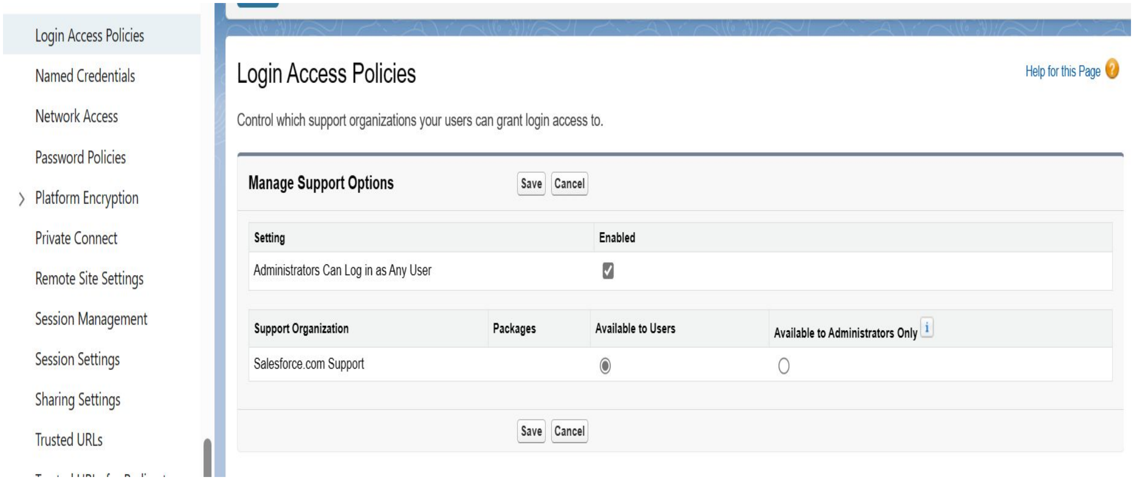
New User Email Link Expiration

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



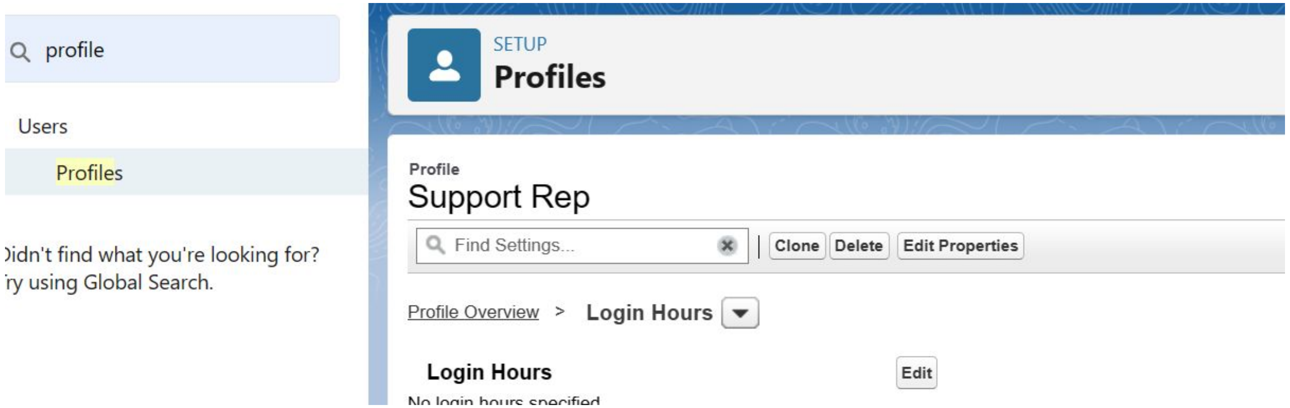
User Login Hours Restriction



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

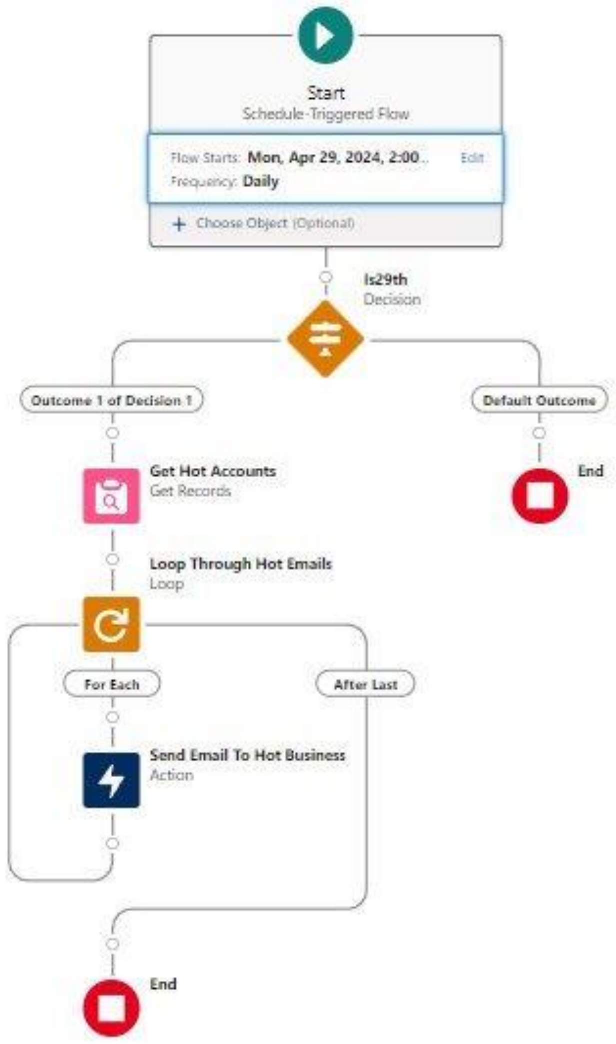
Then you will go to user profile in the System under user profile

Update the data



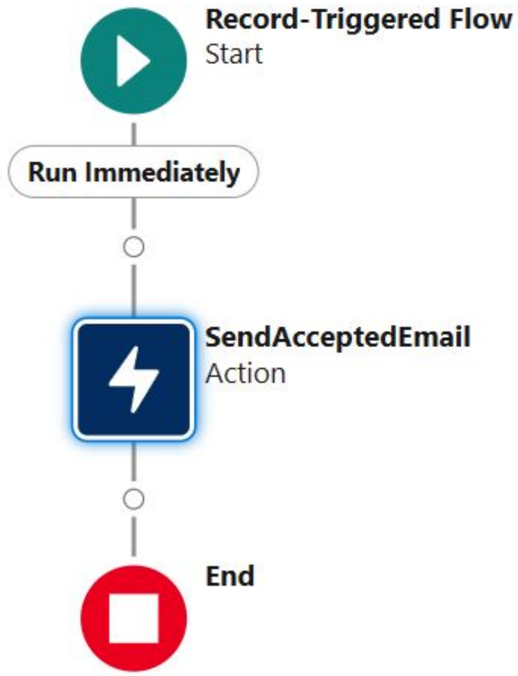
Thank you Email to Hot rating account

- 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