

# SAIGAN Pvt. Ltd.

(PVC PIPES SUPPLIER)

Proposed by

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**Abstract:**

Saigan Pvt. Ltd. is PVC pipelines suppliers which produces quality pipes to the customer with good number of customers. Now, it is using salesforce to expand its business and its profits. Implementing salesforce in company to store huge records and it also makes people easy to order pipes and by providing convenience to customer to not wait in store for hours. Rather, they can simply order those pipes through online.

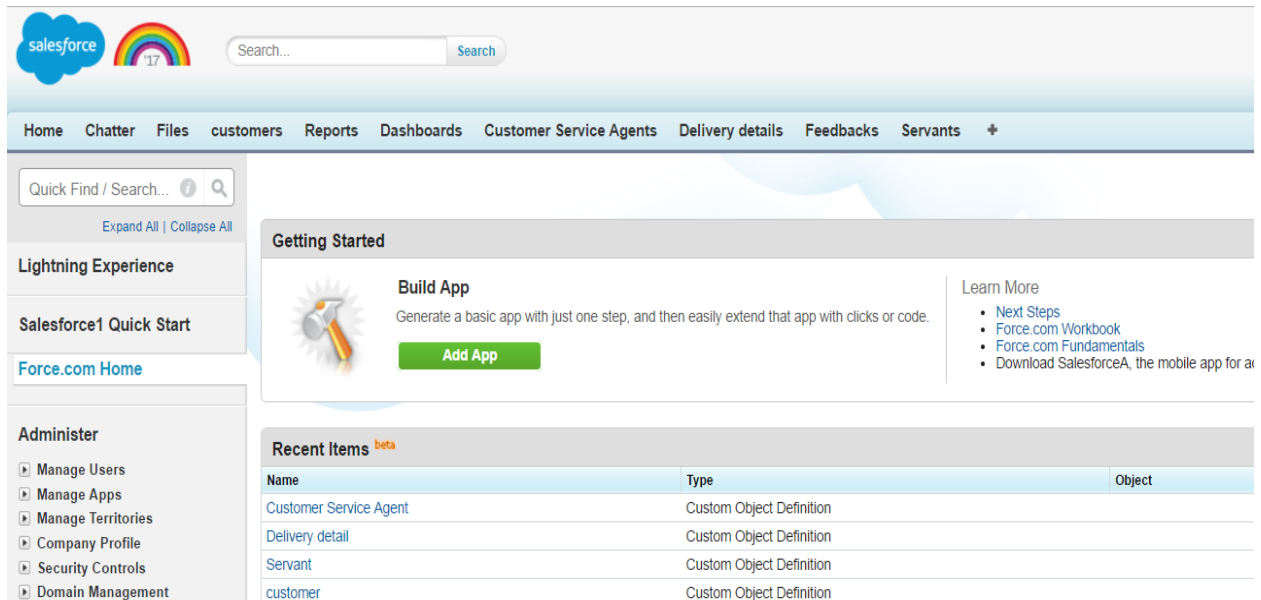
**Salesforce:**

Salesforce is a platform which provides best customer relation management which brings all the customer related data together from all the fields such as sales, Orders, Marketing etc. Since, Customer relation management is main promoter in getting success of company, it can be achieved by using salesforce where we can get entire vision of business which helps in understanding the company in better way. Salesforce can be easily implemented in business due to its simplicity, it does not require any installation software.

The Implementation of salesforce in our company has been done by creating account in salesforce. In salesforce, I created multiple tabs such as . It undergoes multiple process such as

- Architecture Description
- Process control features Description
- Description about integration and user interfaces
- Reports
- How datasets were built
- Steps taken while building a system
- How system is used
- Benefits

## 1.Architecture:



The architecture contains multiple tabs such as customer, customer service agent, Delivery Details, Servants and Feedbacks.

### Customers:

It stores all the customer's information coming to Saigen Pvt. Ltd. such as Name, gender, address, Mobile no and email of customer.

### Customer Service Agent:

Customer Service Agent is employee who serves the customer in organization. This tab consists of Employee id, Mobile no, Name, Address and Gender of employee.

### Delivery Details:

It contains details of Bill price of customer, delivery date and Address of customers where products have to be delivered.

### Servants:

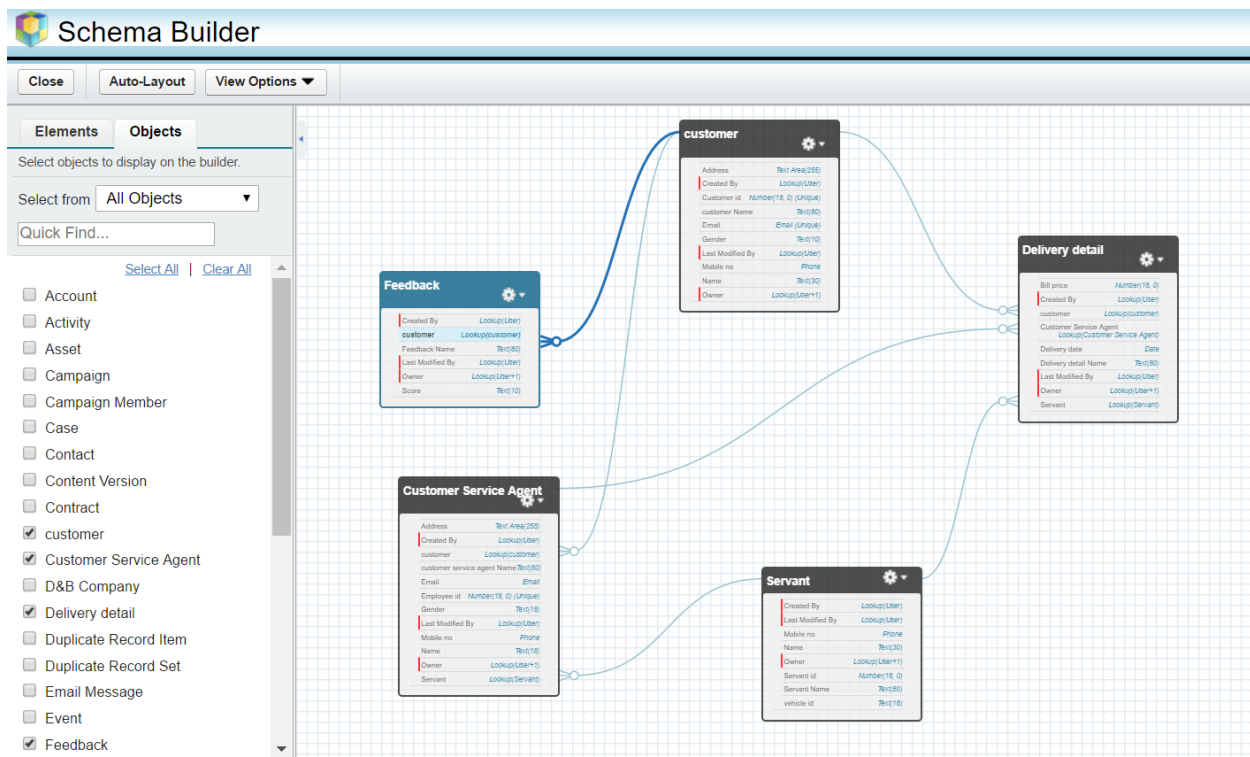
This tab includes the servants details such Servant name, Servant mobile no, servant id, vehicle id (which is using by particular servant).

## Feedbacks:

Feedback taken from customers is stored in this tab. It will be stored in form of Customer id, and score given by that customer.

## 2.Process Control:

The process flows from customer where customer triggers the process. Here, Customer enters in to website and requests the order through online. Customer service agent receives the request in web case and he will notify the customer regarding their delivery. Then, customer service agent will notify the servant about the details of customer and servant will deliver the order to the customer. Finally servant takes feedback from the customer and updates in portal.



The lookups are used to link one object to another object which is shown in above screenshot. The relations between objects are done with lookups.

### 3.Integration and User interface:

By using Web to case option in build section, I created a web page for customers where customers can order through online. When customers request for an order, it will create a new case in salesforce where customer service agent will look at the case and initiates servant to deliver the order.

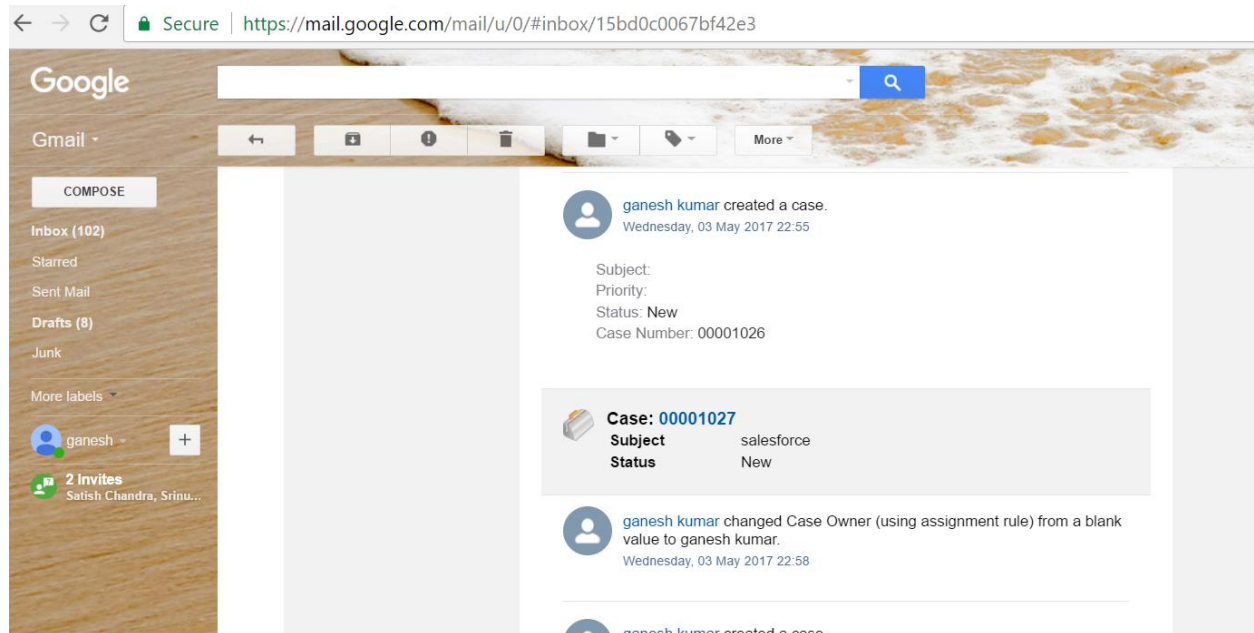
#### Work Flow Rules:

The customer web form has given below where it contains necessary fields which had to be filled by customer.



A screenshot of a web form for creating a case in Salesforce. The form includes the following fields: Contact Name\*, Email\*, Phone\*, Subject\*, Priority\* (with a dropdown menu showing 'None'), Service\* (with a dropdown menu showing 'None'), and Description\*. There is a 'Submit' button at the bottom.

Whenever customer enters the details it will create a new case in salesforce and an email will be sent to customer regarding the case no and details.



The above web page which is created by using html generator in salesforce. It will help in capturing the case information from website and that data will be shown in cases tab

Home Chatter Files customers Reports Dashboards Customer Service Agents Delivery details Feedbacks Servants +

Quick Find / Search... Expand All | Collapse All

Lightning Experience

Salesforce1 Quick Start

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration

### Capturing Case Information from Your Website

Using pre-existing pages on your company's website, you can capture contact and case information from users and automatically create new cases in salesforce.com, en real-time to customer requests.

#### Capture Cases

Copy and paste the sample HTML below and send it to your webmaster.

```
<input type="hidden" name="captcha_settings"
value="{"keyname":"Customer_6072","fallback":"true","orgId":"00D580000011fHP","ts":""}"}>
<input type="hidden" name="orgId" value="00D580000011fHP">
<input type="hidden" name="retURL" value="http://">

<!-- NOTE: These fields are optional debugging elements. Please uncomment -->
<!-- these lines if you wish to test in debug mode. -->
<!-- <input type="hidden" name="debug" value=1> -->
<!-- <input type="hidden" name="debugEmail" -->
<!-- value="ganeshkumarchimakurthi@gmail.com"> -->
<!-- ----- -->

<label for="name">Contact Name</label><input id="name" maxlength="80" name="name" size="20"
type="text" /><br>

<label for="email">Email</label><input id="email" maxlength="80" name="email" size="20"
type="text" /><br>
```

The following screenshot shows the new case which has been created. Whenever customer orders in website, the new case will be created like this in cases tab. Customer service agent will receives those cases and process his orders.

Home Chatter Files customers Reports Dashboards Customer Service Agents Delivery details Feedbacks Servants +

Create New... All Open Cases Edit | Delete | Create New View

List Feed

Recent Items

- a055800000CmMZY
- Agata
- a045800000KF5Qk
- Almeda
- a055800000CmMz
- Ceciley
- a055800000CmMZY
- Demott
- a045800000KF5Qs

Recycle Bin

Action	Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner Alias
Edit   Del	00001002	Pavlova, Stella	Seeking guidance on el...	New	Low	09/02/2017 11:24	gkuma
Edit   Del	00001016	Frank, Edna	Maintenance guidelines...	New	Low	09/02/2017 11:24	gkuma
Edit   Del	00001024	Boyle, Lauren	Design issue with mech...	New	Low	09/02/2017 11:24	gkuma
Edit   Del	00001026	-	-	New	-	03/05/2017 22:55	gkuma
Edit   Del	00001027	-	salesforce	New	-	03/05/2017 22:58	gkuma

## 4.Reports and Dashboards:

Reports and dashboards are given below which helps in analyzing the business.

[Home](#) [Chatter](#) [Files](#) [customers](#) **Reports** [Dashboards](#) [Customer Service Agents](#) [Delivery details](#) [Feedbacks](#) [Servants](#) [+](#)

### Reports & Dashboards

New Report... New Dashboard...

**Folders**

Find a folder...

**All Folders**

- Unfiled Public Reports
- My Personal Custom Reports
- My Personal Dashboards
- Account and Contact Reports
- Opportunity Reports
- Sales Reports
- Lead Reports
- Support Reports

**All Folders**

Find reports and dashboards...

Action	Name	Folder	Created By
▼	address	My Personal C...	kumar_ganesh
▼	feedback rating	My Personal C...	kumar_ganesh
▼	Gender	My Personal C...	kumar_ganesh

## Reports:

Reports are created for the by clicking New Report under Reports tab and by selecting required objects.

### Customer Reports:

[Save](#) [Save As](#) [Close](#) [Report Properties](#) [Add Report Type](#) [Run Report](#)

**Fields**

Quick Find

Drag and drop to add fields to the report.

**Bucket Fields**

- Add Bucket Field
- customer: Info
  - customer: ID
  - customer: customer Name
  - Address
  - Customer id
  - Email
  - Gender
  - Mobile no
  - Name
  - customer: Owner Name
  - customer: Owner Alias
  - customer: Owner Role
  - customer: Created By
  - customer: Created Alias
  - customer: Created Date
  - customer: Last Modified By
  - customer: Last Modified Alias
  - customer: Last Modified Date
  - customer: Last Activity Date

**Filters** [Add](#)

**Show** My customers

**Date Field** customer: Created Di Range All Time From

To add filters, click [Add](#).

**Preview** [Tabular Format](#) [Show](#) [Remove All Columns](#)

customer: customer Name	Gender
Hillier	Male
Verge	Male
Lissy	Female
Brice	Male
Dwight	Male
Blanca	Female
Ceciley	Female
Rice	Male
Dolley	Female
Carlen	Female
Clea	Female
Taylor	Male
Jarrett	Male

## Feedback report:

It contains customer name and score.

**Fields** All #

Quick Find

Drag and drop to add fields to the report.

- Bucket Fields
  - Add Bucket Field
- Feedback: Info
  - Feedback: ID
  - Feedback: Feedback Name
  - customer
  - Score
  - Feedback: Owner Name
  - Feedback: Owner Alias
  - Feedback: Owner Role
  - Feedback: Created By
  - Feedback: Created Alias
  - Feedback: Created Date
  - Feedback: Last Modified By
  - Feedback: Last Modified Alias

**Filters** Add

Show My feedbacks

Date Field Feedback: Created D Range All Time From

To add filters, click Add.

**Preview** Tabular Format Show Remove All Columns

Feedback: Feedback Name	Score
a045800000KF5R8	1
a045800000KF5R9	5
a045800000KF5QN	3
a045800000KF5QO	9
a045800000KF5QP	3
a045800000KF5QQ	9

## Address report:

**Fields** All #

Quick Find

Drag and drop to add fields to the report.

- Bucket Fields
  - Add Bucket Field
- customer: Info
  - customer: ID
  - customer: customer Name
  - Address
  - Customer id
  - Email
  - Gender
  - Mobile no
  - Name
  - customer: Owner Name
  - customer: Owner Alias
  - customer: Owner Role
  - customer: Created By

**Filters** Add

Show My customers

Date Field customer: Created D Range All Time From

To add filters, click Add.

**Preview** Tabular Format Show Remove All Columns

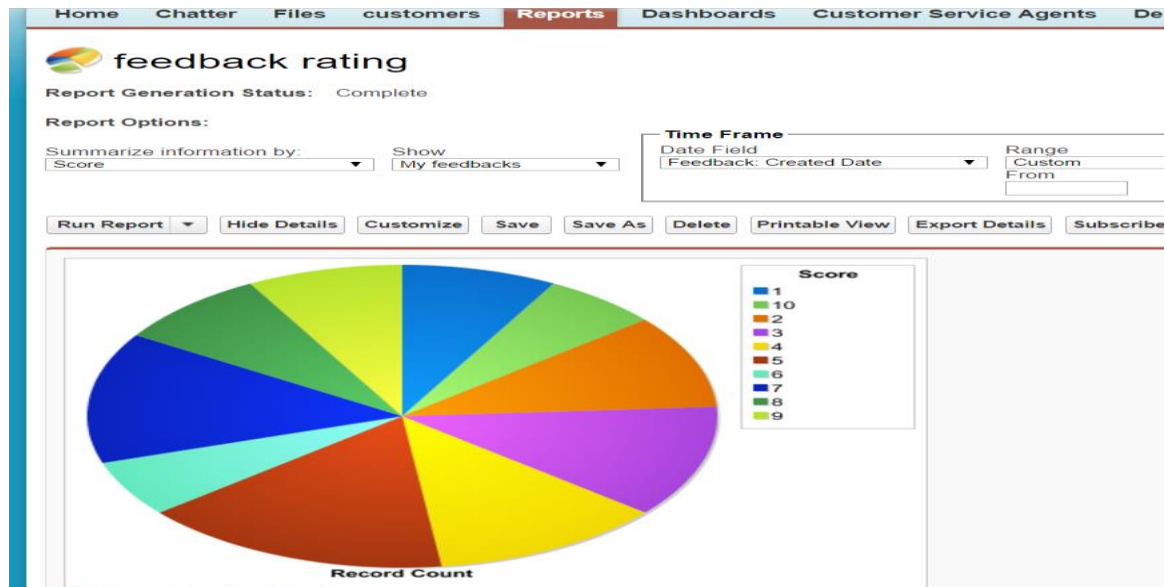
customer: customer Name	Address
Hillier	48 Bayside Place
Verge	657 Fair Oaks Point
Lissy	7 Manley Alley
Brice	79095 Hansons Terrace
Dwight	94 Bluestem Drive
Blanca	57 Anniversary Place

It contains Customer name and address of customer



## Dashboards:

## Feedback rating:



From the report generation, we can say that most of customers are giving scores between 4 and 8. It says that there are most of the sectors has to be developed.

## Gender:



It says that Male and females are almost same in number those who are visiting our organization. But males are bit more comparatively to females.

## Address Dashboard:

### Report Options:

Summarize information by:

Address

Show

My customers

### Time Frame

Date Field

customer: Created Date

Range

Custom

From

Run Report

Hide Details

Customize

Save

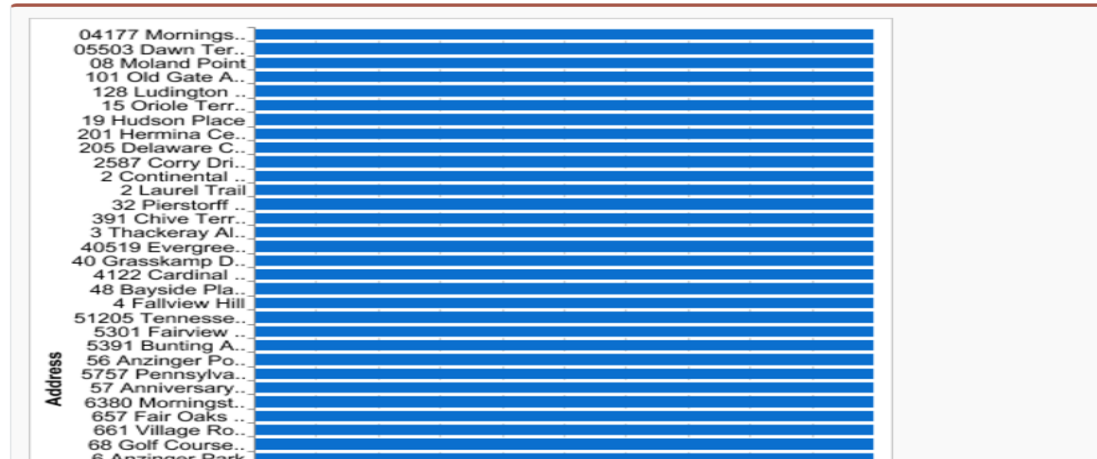
Save As

Delete

Printable View

Export Details

Subscri



It says about different customers coming from different addresses. From this, we can analyze which area customers are mostly likely to visit our organization.

## 5. Building Datasets:

I created dummy dataset by using website [www.mockaroo.com](http://www.mockaroo.com) where datasets are created according to object fields. Finally, the datasets were loaded into salesforce by using Import custom objects in Data present in Quick Links.

Security Controls

Domain Management

Communication Templates

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Lightning for Outlook

Lightning for Gmail BETA

Lightning Sync

Email Administration

Google Apps

Data.com Administration

Build

Customize

Create

Develop

Schema Builder

Lightning App Builder

Canvas App Previewer

Installed Packages

AppExchange Marketplace

Critical Updates

Servant	Custom Object Definition	
customer	Custom Object Definition	
Feedback	Custom Object Definition	
Bill price	Custom Field Definition	Delivery detail
customer	Custom Field Definition	Delivery detail
Servant	Custom Field Definition	Customer Service Agent
customer	Custom Field Definition	Customer Service Agent
Score	Custom Field Definition	Feedback

Quick Links

Tools

App Quick Start

Schema Builder

New custom object

Users

New user

Add multiple users

Reset users' passwords

App

Manage apps

Manage profiles

Enable Chatter feeds

Security

New profile

New permission set

Add roles

Data

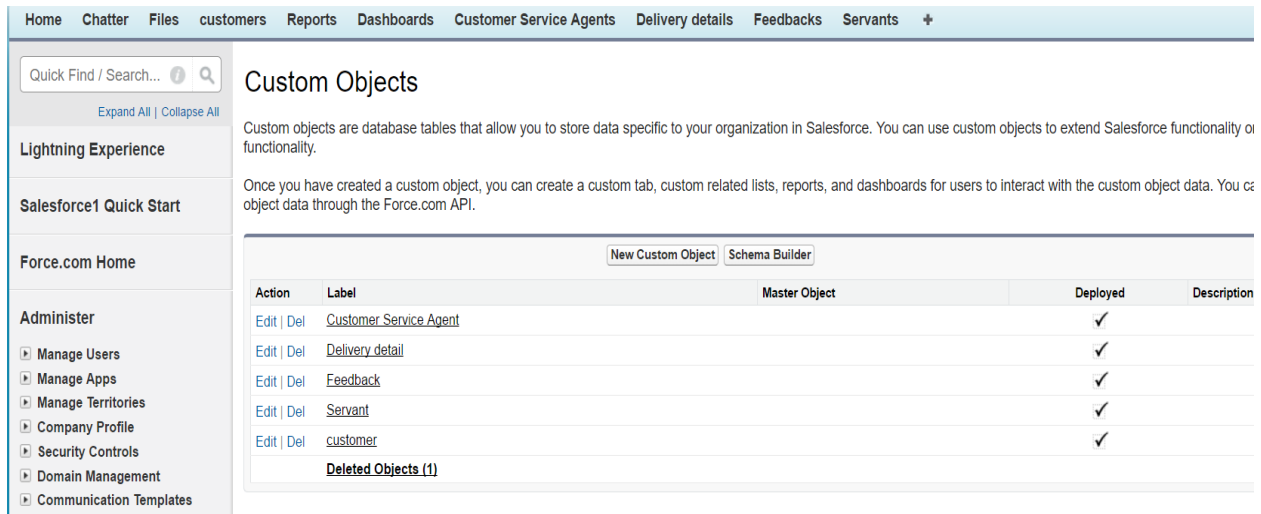
Import accounts & contacts

Import custom objects

Mass delete records

## 6.Steps while building a system:

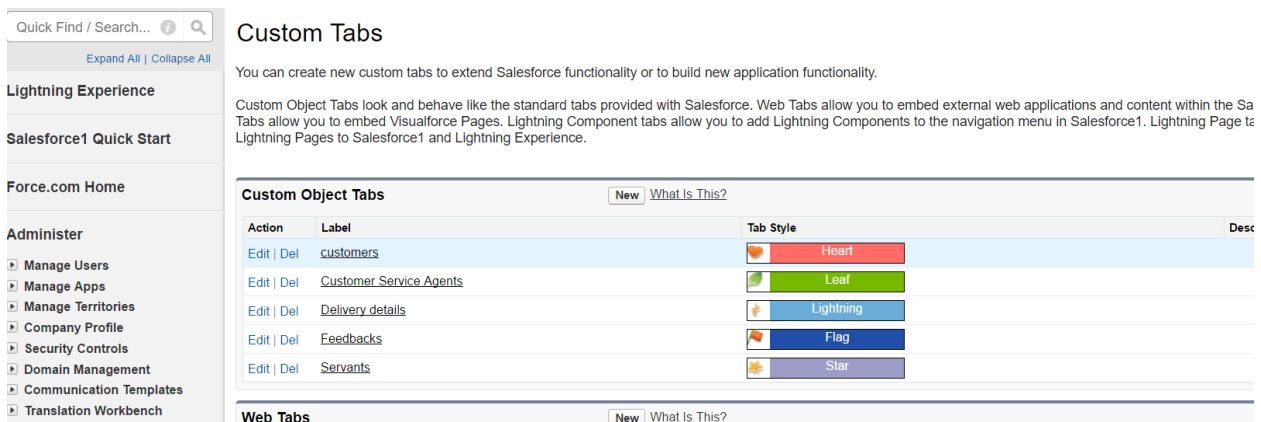
To create objects in salesforce, click the setup and go to objects under the build option and click on create. It will create new objects. Similarly, the following screenshot shows list of custom objects.



The screenshot shows the Salesforce 'Custom Objects' page. The left sidebar contains navigation links: Home, Chatter, Files, customers, Reports, Dashboards, Customer Service Agents, Delivery details, Feedbacks, Servants, and a plus icon. Below these are sections for Lightning Experience, Salesforce1 Quick Start, Force.com Home, and Administer (with sub-links like Manage Users, Manage Apps, etc.). The main content area is titled 'Custom Objects' and includes a description: 'Custom objects are database tables that allow you to store data specific to your organization in Salesforce. You can use custom objects to extend Salesforce functionality or functionality.' Below the description is a table of custom objects.

Action	Label	Master Object	Deployed	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Customer Service Agent</a>		✓	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Delivery detail</a>		✓	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Feedback</a>		✓	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Servant</a>		✓	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">customer</a>		✓	
<b>Deleted Objects (1)</b>				

Below screenshot shows the custom tabs of objects. It has been shown by selecting Tab in create option.



The screenshot shows the Salesforce 'Custom Tabs' page. The left sidebar is identical to the previous screenshot. The main content area is titled 'Custom Tabs' and includes a description: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' Below the description is a table of custom object tabs.

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">customers</a>	Heart	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Customer Service Agents</a>	Leaf	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Delivery details</a>	Lightning	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Feedbacks</a>	Flag	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Servants</a>	Star	

Now the objects with their respective fields are shown below. The relationship between different objects are indicated by using lookups between different objects.

## Customer service agent tab fields:

woone Administration

Desktop Administration

Lightning for Outlook

Lightning for Gmail **BETA**

Lightning Sync

Email Administration

Google Apps

Data.com Administration

Build

Customize

Create

Apps

Custom Labels

Interaction Log Layouts

Objects

Picklist Value Sets

Packages

Report Types

Tabs

Service Cloud Launch Pad

Action Link Templates

Global Actions

Workflow & Approvals

Develop

Schema Builder

Lightning App Builder

Canvas App Previewer

Installed Packages

Standard Fields

Standard Fields Help ?

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	<u>Created By</u>	CreatedBy	Lookup(User)		
Edit	customer service agent Name	Name	Text(80)		✓
	<u>Last Modified By</u>	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(User.Queue)		✓

Custom Fields & Relationships

New

Field Dependencies

Custom Fields & Relationships Help ?

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	Address	Address__c	Text Area(255)			ganesh kumar, 03/05/2017 17:22
Edit   Del	customer	Customer_id__c	Lookup(customer)	✓		ganesh kumar, 03/05/2017 12:31
Edit   Del	Email	Email__c	Email			ganesh kumar, 03/05/2017 12:32
Edit   Del	Employee id	Employee_id__c	Number(18, 0) (Unique)	✓		ganesh kumar, 03/05/2017 12:34
Edit   Del	Gender	Gender__c	Text(18)			ganesh kumar, 03/05/2017 12:36
Edit   Del	Mobile no	Mobile_no__c	Phone			ganesh kumar, 03/05/2017 12:36
Edit   Del	Name	Name__c	Text(18)			ganesh kumar, 03/05/2017 12:35
Edit   Del	Servant	Servant_id__c	Lookup(Servant)	✓		ganesh kumar, 03/05/2017 12:32
Deleted Fields (2)						

Related Lookup Filters

No related lookup filters defined.

Validation Rules

New

Validation Rules Help ?

No validation rules defined.

## Delivery details tab fields:

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Lightning for Outlook

Lightning for Gmail **BETA**

Lightning Sync

Email Administration

Google Apps

Data.com Administration

Build

Customize

Create

Apps

Custom Labels

Interaction Log Layouts

Objects

Picklist Value Sets

Packages

Report Types

Tabs

Service Cloud Launch Pad

Action Link Templates

Global Actions

Workflow & Approvals

Created By ganesh kumar, 03/05/2017 11:35

Modified By ganesh kumar, 03/05/2017 17:23

Standard Fields

Standard Fields Help ?

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	<u>Created By</u>	CreatedBy	Lookup(User)		
Edit	Delivery detail Name	Name	Text(80)		✓
	<u>Last Modified By</u>	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(User.Queue)		✓

Custom Fields & Relationships

New

Field Dependencies

Custom Fields & Relationships Help ?

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	Bill price	Bill_price__c	Number(18, 0)			ganesh kumar, 03/05/2017 17:23
Edit   Del	customer	Customer_id__c	Lookup(customer)	✓		ganesh kumar, 03/05/2017 12:51
Edit   Del	Customer Service Agent	Employee_id__c	Lookup(Customer Service Agent)	✓		ganesh kumar, 03/05/2017 12:52
Edit   Del	Delivery date	Delivery_date__c	Date			ganesh kumar, 03/05/2017 12:57
Edit   Del	Servant	Servant_id__c	Lookup(Servant)	✓		ganesh kumar, 03/05/2017 12:55

Related Lookup Filters

No related lookup filters defined.

Validation Rules

New

Validation Rules Help ?

No validation rules defined.

## Feedback tab fields:

Lightning for Outlook

Lightning for Gmail **BETA**

Lightning Sync

Email Administration

Google Apps

Data.com Administration

Build

Customize

Create

Apps

Custom Labels

Interaction Log Layouts

Objects

Picklist Value Sets

Packages

Report Types

Tabs

Service Cloud Launch Pad

Action Link Templates

Global Actions

Workflow & Approvals

Develop

Schema Builder

Lightning App Builder

Action	Field Label	Field Name	Data Type	Indexed	Controlling Field	Modified By
	Created By	CreatedBy	Lookup(User)			
Edit   Del	Feedback Name	Name	Text(80)			
	Last Modified By	LastModifiedBy	Lookup(User)			
Edit	Owner	Owner	Lookup(User,Queue)			

Custom Fields & Relationships

NewField Dependencies

Custom Fields & Relationships Help ?

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	customer	Customer_id__c	Lookup(customer)	✓		ganesh kumar, 03/05/2017 12:42
Edit   Del	Score	Score__c	Text(10)			ganesh kumar, 03/05/2017 13:32

Deleted Fields (1)

Related Lookup Filters

No related lookup filters defined.

Validation Rules

New

Validation Rules Help ?

No validation rules defined.

Triggers

New

Triggers Help ?

No triggers defined.

Page Layouts

NewPage Layout Assignment

Page Layouts Help ?

## Servant tab fields:

Mobile Administration

Desktop Administration

Lightning for Outlook

Lightning for Gmail **BETA**

Lightning Sync

Email Administration

Google Apps

Data.com Administration

Build

Customize

Create

Apps

Custom Labels

Interaction Log Layouts

Objects

Picklist Value Sets

Packages

Report Types

Tabs

Service Cloud Launch Pad

Action Link Templates

Global Actions

Workflow & Approvals

Develop

Schema Builder

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(User,Queue)		✓
Edit	Servant Name	Name	Text(80)		✓

Custom Fields & Relationships

NewField Dependencies

Custom Fields & Relationships Help ?

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	Mobile no	Mobile_no__c	Phone			ganesh kumar, 03/05/2017 12:17
Edit   Del	Name	Name__c	Text(30)			ganesh kumar, 03/05/2017 12:16
Edit   Del	Servant id	Servant_id__c	Number(18, 0)			ganesh kumar, 03/05/2017 12:16
Edit   Del	vehicle id	vehicle_id__c	Text(18)			ganesh kumar, 03/05/2017 15:43

Related Lookup Filters

No related lookup filters defined.

Validation Rules

New

Validation Rules Help ?

No validation rules defined.

Triggers

New

Triggers Help ?

No triggers defined.

## Customer tab fields:

Desktop Administration

Lightning for Outlook

Lightning for Gmail **BETA**

Lightning Sync

Email Administration

Google Apps

Data.com Administration

Build

Customize

Create

Apps

Custom Labels

Interaction Log Layouts

Objects

Picklist Value Sets

Packages

Report Types

Tabs

Service Cloud Launch Pad

Action Link Templates

Global Actions

Workflow & Approvals

Develop

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
Edit	customer Name	Name	Text(80)		✓
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(User,Queue)		✓

Custom Fields & Relationships

NewField Dependencies

Custom Fields & Relationships Help ?

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	Address	Address__c	Text Area(255)			ganesh kumar, 03/05/2017 17:21
Edit   Del	Customer id	Customer_id__c	Number(18, 0) (Unique)	✓		ganesh kumar, 03/05/2017 12:04
Edit   Del	Email	Email__c	Email (Unique)	✓		ganesh kumar, 03/05/2017 12:04
Edit   Del	Gender	Gender__c	Text(10)			ganesh kumar, 03/05/2017 12:06
Edit   Del	Mobile no	Mobile_no__c	Phone			ganesh kumar, 03/05/2017 12:08
Edit   Del	Name	Name__c	Text(30)			ganesh kumar, 03/05/2017 12:06

Related Lookup Filters

No related lookup filters defined.

Validation Rules

New

Validation Rules Help ?

No validation rules defined.

Screenshots after data is loaded in each object are given below,

### Data loaded into Customer:

The screenshot shows the 'customers' page with a navigation bar at the top containing 'Home', 'Chatter', 'Files', 'customers' (highlighted), 'Reports', 'Dashboards', 'Customer Service Agents', and 'Delivery'. Below the navigation bar is a 'Create New...' button and a heart icon. The main content area features a 'Recent Items' sidebar on the left with a list of items: 'a055800000CrM2Y', 'Agata', 'a045800000KF5Qk', 'Almeda', 'a055800000CrMAz', 'Ceciley', 'a055800000CrM2X', 'Demott', and 'a045800000KF5Qs'. Below the sidebar is a 'Recycle Bin' button. The main list of customers is displayed in a table with columns 'Action' and 'customer Name'. The table contains 15 rows of customer data, each with an 'Edit | Del' link and a heart icon. The 'customer Name' column lists: Agata, Alina, Ari, Bernardo, Blanca, Brice, Carlen, Ceciley, Clea, Conn, Demott, Dolley, Dwight, Edd, Eria, Erma, and Fleming.

Action	customer Name
Edit   Del	Agata
Edit   Del	Alina
Edit   Del	Ari
Edit   Del	Bernardo
Edit   Del	Blanca
Edit   Del	Brice
Edit   Del	Carlen
Edit   Del	Ceciley
Edit   Del	Clea
Edit   Del	Conn
Edit   Del	Demott
Edit   Del	Dolley
Edit   Del	Dwight
Edit   Del	Edd
Edit   Del	Eria
Edit   Del	Erma
Edit   Del	Fleming

The screenshot shows the 'New customer' form in the 'customers' page. The navigation bar at the top is the same as the previous screenshot. The 'Recent Items' sidebar is also present. The main content area is titled 'New customer' and contains a form with the following fields: 'customer Name', 'Customer id', 'Email', 'Name', 'Gender', 'Address', and 'Mobile no'. The form has 'Save', 'Save & New', and 'Cancel' buttons at the top and bottom.

customer Name

Customer id

Email

Name

Gender

Address

Mobile no

## Data loaded into Customer Service Agents:

Home Chatter Files customers Reports Dashboards **Customer Service Agents** D

Create New... All Edit | Delete | Create New View

**Recent Items**

- a055800000CrM2Y
- Agata
- a045800000KF5Qk
- Almeda
- a055800000CrMAz
- Ceciley
- a055800000CrM2X
- Demott
- a045800000KF5Qs

**Recycle Bin**

**New Customer Service Agent** Change Owner

Action	cust	New Customer Service Agent
Edit   Del	Alasdair	
Edit   Del	Ange	
Edit   Del	Any	
Edit   Del	Bail	
Edit   Del	Barb	
Edit   Del	Benyamin	
Edit   Del	Bethena	
Edit   Del	Brina	
Edit   Del	Cathrine	
Edit   Del	Christiano	
Edit   Del	Corny	
Edit   Del	Dolf	
Edit   Del	Donelle	
Edit   Del	Drud	
Edit   Del	Electra	
Edit   Del	Ellis	
Edit   Del	Emanuele	
Edit   Del	Emmalee	

Home Chatter Files customers Reports Dashboards **Customer Service Agents** Delivery details Feedbacks Servants +

Create New...

**Recent Items**

- a055800000CrM2Y
- Agata
- a045800000KF5Qk
- Almeda
- a055800000CrMAz
- Ceciley
- a055800000CrM2X
- Demott
- a045800000KF5Qs

**Recycle Bin**

Customer Service Agent Edit

### New Customer Service Agent

**Customer Service Agent Edit** Save Save & New Cancel

**Information**

customer service agent Name

customer

Servant

Email

Employee id

Name

Gender

Mobile no

Address

customer Lookup (New Window)

Customer lookup is used to retrieve data from other object.

## Data loaded into Delivery details:

[Home](#) [Chatter](#) [Files](#) [customers](#) [Reports](#) [Dashboards](#) [Customer Service Agents](#) **Delivery details** [Feedbacks](#) [Servants](#) [+](#)

[Create New...](#)

**All** [Edit](#) [Delete](#) [Create New View](#)

**Recent Items**

- [a055800000CrM2Y](#)
- [Agata](#)
- [a045800000KF5Qk](#)
- [Almeda](#)
- [a055800000CrMAz](#)
- [Ceciley](#)
- [a055800000CrM2X](#)
- [Demott](#)
- [a045800000KF5Qs](#)

**Recycle Bin**

**New Delivery detail** **Change Owner**

[A](#) [B](#) [C](#) [D](#) [I](#)

<input type="checkbox"/>	Action	Delivery detail Name ↑
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrM2X</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrM2Y</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMAx</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMAy</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMAz</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMB0</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMB1</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMB2</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMB3</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMB4</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMB5</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMB6</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMB7</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMB8</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">a055800000CrMB9</a>

[Home](#) [Chatter](#) [Files](#) [customers](#) [Reports](#) [Dashboards](#) [Customer Service Agents](#) **Delivery details** [Feedbacks](#) [Servants](#) [+](#)

[Create New...](#)

**Delivery detail Edit**  
**New Delivery detail**

**Delivery detail Edit** **Save** **Save & New** **Cancel**

**Information**

Delivery detail Name

Owner ganesh kumar

customer

Customer Service Agent

Servant

Bill price

Delivery date  [ 04/05/2017 ]

**Save** **Save & New** **Cancel**



Data loaded into Feedback:

HomeChatterFilescustomersReportsDashboardsCustomer Service AgentsDelivery detailsFeedbacksServants+

Create New...

All

Edit | Delete | Create New View

Recent Items

a055800000CrM2Y

Agata

a045800000KF5Qk

Almeda

a055800000CrMAz

Ceciley

a055800000CrM2X

Demott

a045800000KF5Qs

Recycle Bin

New FeedbackChange Owner

A | B | C | D | E | F | G | H | I | J

Action	Feedback Name
<input type="checkbox"/> Edit   Del	1
<input type="checkbox"/> Edit   Del	10
<input type="checkbox"/> Edit   Del	11
<input type="checkbox"/> Edit   Del	12
<input type="checkbox"/> Edit   Del	13
<input type="checkbox"/> Edit   Del	14
<input type="checkbox"/> Edit   Del	15
<input type="checkbox"/> Edit   Del	16
<input type="checkbox"/> Edit   Del	17
<input type="checkbox"/> Edit   Del	18
<input type="checkbox"/> Edit   Del	19
<input type="checkbox"/> Edit   Del	2
<input type="checkbox"/> Edit   Del	20
<input type="checkbox"/> Edit   Del	21
<input type="checkbox"/> Edit   Del	22
<input type="checkbox"/> Edit   Del	23
<input type="checkbox"/> Edit   Del	24
<input type="checkbox"/> Edit   Del	25
<input type="checkbox"/> Edit   Del	26

HomeChatterFilescustomersReportsDashboardsCustomer Service AgentsDelivery detailsFeedbacksServants+

Create New...

Feedback Edit

New Feedback

Recent Items

a055800000CrM2Y

Agata

a045800000KF5Qk

Almeda

a055800000CrMAz

Ceciley

a055800000CrM2X

Demott

a045800000KF5Qs

Feedback Edit

SaveSave & NewCancel

Information

Feedback Name

customer

Score

Owner ganesh kumar

SaveSave & NewCancel

## Data loaded into Servant tab:

This screenshot shows the 'Servants' tab in a Salesforce application. The top navigation bar includes links for Home, Chatter, Files, customers, Reports, Dashboards, Customer Service Agents, Delivery details, Feedbacks, and Servants. Below the navigation bar, there is a 'Create New...' button and a star icon next to 'All' with links for 'Edit', 'Delete', and 'Create New View'. On the left sidebar, there is a 'Recent Items' list with entries like 'a055800000CrM2Y', 'Agata', 'a045800000KF5Qk', 'Almeda', 'a055800000CrMAz', 'Ceciley', 'a055800000CrM2X', 'Demott', and 'a045800000KF5Qs', along with a 'Recycle Bin' button. The main content area displays a table of servants with columns for 'Action' and 'Servant Name'. The table lists 15 servants: Adolt, Alissa, Almeda, Andrew, Arden, Bartholomeus, Beverie, Carola, Cristian, Currey, Daveen, Debera, Emmaline, Eyde, and Farrell. Each row has an 'Edit | Del' link. A 'New Servant' button and a 'Change Owner' button are at the top of the table. A dropdown menu is open for the 'Change Owner' button, showing 'Change Owner' as the selected option.

Action	Servant Name
Edit   Del	Adolt
Edit   Del	Alissa
Edit   Del	Almeda
Edit   Del	Andrew
Edit   Del	Arden
Edit   Del	Bartholomeus
Edit   Del	Beverie
Edit   Del	Carola
Edit   Del	Cristian
Edit   Del	Currey
Edit   Del	Daveen
Edit   Del	Debera
Edit   Del	Emmaline
Edit   Del	Eyde
Edit   Del	Farrell

This screenshot shows the 'Servant Edit' page in a Salesforce application. The top navigation bar is the same as the previous screenshot. Below the navigation bar, there is a 'Create New...' button and a star icon next to 'New Servant'. On the left sidebar, there is a 'Recent Items' list with the same entries as the previous screenshot, along with a 'Recycle Bin' button. The main content area displays a form titled 'Servant Edit' with buttons for 'Save', 'Save & New', and 'Cancel'. The form has a section for 'Information' with fields for 'Servant Name', 'Servant id', 'Name', 'Mobile no', and 'vehicle id'. The 'Servant Name' field is currently empty. The 'Owner' field is also empty.

Information	
Servant Name	
Servant id	
Name	
Mobile no	
vehicle id	

These are the screenshots after loading data in to salesforce.

## Process of loading data into salesforce:

The below screenshots shows how data is loaded in to objects. At first I am retrieving data from servant.csv file in to servant object.

### Step1:

Selecting Import custom objects in Data in Quick links.

The screenshot shows the Salesforce Admin console interface. On the left is a navigation menu with sections: Administer, Build, and Monitor. The 'Recent Items' section displays a table of recent actions. The 'Quick Links' section provides shortcuts for various tasks.

Name	Type	Object
Customer Service Agent	Custom Object Definition	
customer	Custom Object Definition	
Servant	Custom Object Definition	
Feedback	Custom Object Definition	
Delivery detail	Custom Object Definition	
Bill price	Custom Field Definition	Delivery detail
customer	Custom Field Definition	Delivery detail
Servant	Custom Field Definition	Customer Service Agent
customer	Custom Field Definition	Customer Service Agent
Score	Custom Field Definition	Feedback

**Quick Links**

- Tools**
  - App Quick Start
  - Schema Builder
  - New custom object
- Users**
  - New user
  - Add multiple users
  - Reset users' passwords
- App**
  - Manage apps
  - Manage profiles
  - Enable Chatter feeds
- Security**
  - New profile
  - New permission set
- Data**
  - Import accounts & contacts
  - Import custom objects

### Step 2:

Selecting launch wizard

The screenshot shows the 'Before you import your data' wizard screen. It includes a sidebar with navigation options, a warning box about import limits, and a 4-step process flow for importing data.

**Before you import your data . . .**

unmapped fields is not imported. [View a list of Salesforce data fields.](#)

**Don't import too many records at once**  
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

**Import your data in 3 easy steps!**  
Launch the Data Import Wizard to import your data.

**Pre-step: Prepare your data for import** → **Choose data to import** → **Edit field mapping** → **Review and start import**

**Launch Wizard!**

### Step 3:

Selecting custom objects and selecting the particular CSV file.

Choose data

Edit mapping

Start import

### Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing? [?](#)

Standard objects

Custom objects

Delivery details

Feedbacks

Servants

customers

What do you want to do? [?](#)

Add new records

Match by: [?](#)  
--None--

Which User field in your file designates record owners? [?](#)  
--None--

Trigger workflow rules and processes? [?](#)  
☐ Trigger workflow rules and processes for new and updated records

Where is your data located? [?](#)

Drag CSV file here to upload

CSV

File

Choose file

servant.csv

Character Code [?](#)

ISO-8859-1 (General US & Western European, ISO-LATIN-1)

### Step 4:

Columns in Objects are mapped into columns in CSV file.

Choose data

Edit mapping

Start import

### Edit Field Mapping: Servants

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
<a href="#">Change</a>	Mobile no	Mobile no	63-(867)293-3	380-(698)252	359-(432)900-8423
<a href="#">Change</a>	Servant Name	Name	Ly	Farrell	Sher
<a href="#">Change</a>	Servant id	Servant id	1	2	3
<a href="#">Change</a>	vehicle id	vehicle id	1	2	3

### Step 5:

After mapping, data is loaded in salesforce which is shown below

Salesforce1 Quick Start

Force.com Home

Administer

Manage Users

Manage Apps

Manage Territories

Company Profile

Security Controls

Domain Management

Communication Templates

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Lightning for Outlook

Lightning for Gmail BETA

Lightning Sync

Email Administration

Google Apps

Data.com Administration

Build

Customize

Bulk Data Load Job Detail

Reload

Job ID	75058000006r52N	Status	Closed	Total Processing Time (ms)	344
Submitted By	ganesh.kumar	Operation	Insert	API Active Processing Time (ms)	293
Start Time	04/05/2017 03:45 GMT	Queued Batches	0	Apex Processing Time (ms)	0
End Time	04/05/2017 03:45 GMT	In Progress Batches	0		
Time to Complete (hh:mm:ss)	00:00	Completed Batches	1		
Object	Servant	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	50		
Concurrency Mode	Parallel	Records Failed	0		
API Version	39.0	Retries	0		
<div>Reload</div>					

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
<a href="#">View Request</a>	<a href="#">View Result</a>	75158000007zT1N	04/05/2017 03:45	04/05/2017 03:45	344	293	0	50	0	0		Completed

## 7. How system is used:

- Lots of data can be stored in structured format.
- Analyzing of organization can be done by using multiple reports and dashboards.
- Different tools are available to organization in salesforce which helps to increase expansion of business.
- Using salesforce, it is easy to serve the customer in all aspects.
- Salesforce is combination of all entities so that everyone can communicate with each other.
- Automatic Emails are helpful to customer in tracking the order which is done by salesforce.

## 8. Benefits:

- Inviting New customers
- Updates of data can be done easily.
- Growth of organization
- Ease of use

- Fast in service
- Monitoring of each task by Customer Service Agent

**Conclusion:**

Salesforce implementation in business is highly acceptable due to its advantages to customers and organization.