Phase 1: Problem Understanding & Industry Analysis

Overview

The first phase establishes a foundation by clearly understanding the problem, identifying stakeholders, analyzing the PlayStation gaming industry, and mapping existing business processes. This helps ensure the CRM solution aligns with real-world needs.

Activities Done

1. **Requirement Gathering**

   o Conducted discussions with hypothetical stakeholders.

   o Identified the following requirements:

      ▪ Centralized gamer profile management (purchase history, subscriptions, preferences).

      ▪ Subscription lifecycle management for PlayStation Plus & Premium.

      ▪ Customer support case management & automated ticket routing.

      ▪ Marketing automation for personalized promotions.

      ▪ Developer/publisher partnership tracking (onboarding, revenue share).

      ▪ Esports and event tracking for community engagement.

2. **Stakeholder Analysis**

   o **Gamers** – End users; need personalized recommendations and faster support.

   o **Customer Support Agents** – Manage cases and improve resolution time.

   o **Marketing Teams** – Run campaigns for new game launches.

   o **Developers & Publishers** – Manage contracts, game releases, and performance analytics.

   o **PlayStation Management** – Require executive dashboards with KPIs on subscriptions, sales, and engagement.

3. **Business Process Mapping**

   o Current: Multiple disconnected systems (payment, support, marketing).

- o Issues: Delays in renewals, fragmented customer view, poor personalization.

- o Future with Salesforce CRM: Single system to unify gamer data, automate renewals, support, and campaigns.

4. **Industry-Specific Use Case Analysis**

- o Benchmarked Xbox Game Pass, Steam, Epic Games.

- o Observed gaps PlayStation can solve: deeper personalization, loyalty tracking, AI-driven insights, and improved developer relations.

5. **AppExchange Exploration**

- o Evaluated relevant tools:

    - Gamification Add-ons → to reward loyalty.

    - Survey Apps → collect gamer feedback.

    - Knowledge Base & Chatbot → reduce support burden.

    - Marketing Enhancements → improve campaign automation.

Phase 2: Org Setup & Configuration

Overview

In this phase, the Salesforce **Developer Edition** org was set up to provide the base environment for the PlayStation Gaming CRM project. The focus was on configuring only the most essential settings to keep the project simple, structured, and ready for development.

Activities Done

1. Salesforce Edition

- Selected **Developer Edition**, which provides essential CRM features such as custom objects, automation, reports, and dashboards.

- Chosen because it is free, easy to use, and suitable for student and training projects.

2. Company Profile Setup

- **Company Name**: Sony PlayStation CRM

- **Currency**: USD and INR

- **Locale/Time Zone**: English (United States), IST (GMT+05:30)

3. Business Hours & Holidays

- **Business Hours**: Configured as 24x7 (to simulate gamer support availability).

- **Holidays Added**: Christmas, New Year, Diwali.

4. Fiscal Year Settings

- Fiscal cycle configured as **April – March** to align with common financial reporting practices.

5. User Setup

- Added the following users for simulation:

  - **System Administrator** – Full access (project owner).

  - **Support Agent** – To handle gamer cases.

  - **Marketing Manager** – For campaigns and promotions.

  - **Publisher/Repair Team** – To manage game publisher/repair data.

- Assigned available licenses (limited in Developer Edition).

6. Profiles & Roles

- **Profiles Created**: Admin, Support, Marketing, Publisher/Repair.

- **Roles Defined**: CEO → Managers → Agents (basic hierarchy).

7. Security Settings

- **OWD (Organization-Wide Defaults)**: Private for sensitive data such as subscriptions.

- **MFA (Multi-Factor Authentication)**: Enabled for login security.

📅 Holiday Detail

Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, also suspend any escalation rules associated with business hours.

Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.

Business Hours [1]

Holiday Detail		Edit Delete	
Holiday Name	Christmas		
Description			
Date and Time	12/25/2025 All Day		
Created By	Himanshu Kumar 9/22/2025, 9:20 AM	Last Modified By	Himanshu Kumar 9/22/2025, 9:20 AM

Edit Delete

Business Hours	Add/Remove	Business Hours Help ❓
Business Hours Name	**Time Zone**	
24x7 Support	(GMT+05:30) India Standard Time (Asia/Kolkata)	

⌃ Back To Top   Always show me ▼ more records per related list

Organization Business Hours

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

		New Business Hours			
Action	**Business Hours Name** ↑	**Active**	**Time Zone**		**Default**
Edit	24x7 Support	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)		✓
Edit	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)		☐
Edit	Gaming CRM	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)		☐

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Setup   Home   Object Manager ∨

🔍 Search Setup

🔍 company in

∨ Company Settings

Company Information

Didn't find what you're looking for?
Try using Global Search.

Company Information
Sony PlayStation CRM

The organization's profile is below.

User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [10+]

Organization Detail		Edit		
Organization Name	Sony PlayStation CRM	Phone	+1-800-555-1234	
Primary Contact	Himanshu	Fax		
Division		Default Locale	English (United States)	
Address		Default Language	English	
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	
Activate Multiple Currencies	☐	Currency Locale	English (United States) - USD	
Enable Data Translation	☐	Used Data Space	384 KB (8%) [View]	
Newsletter	✓	Used File Space	125 KB (1%) [View]	
Admin Newsletter	✓	API Requests, Last 24 Hours	0 (15,000 max)	
Hide Notices About System Maintenance	☐	Streaming API Events, Last 24 Hours	0 (10,000 max)	
Hide Notices About System Downtime	☐	Restricted Logins, Current Month	0 (0 max)	
Locale Formats	ICU	Salesforce.com Organization ID	00DgK000007bzID	
		Organization Edition	Developer Edition	

Phase 3: Data Modeling & Relationships

Overview

After completing Org Setup & Configuration (Phase 2), the focus of this phase was to design and implement the data model for the PlayStation Gaming CRM. The objective was to represent the key entities of the gaming ecosystem—gamers, games, subscriptions, and support cases—through structured objects and meaningful relationships.

This data model ensures that information is well-organized, interconnected, and easy to manage, forming the foundation for future automation, workflows, and reporting.

Activities Completed

1. Standard Objects Utilized

- **Contacts** → Represent gamers.

- **Cases** → Log and track gamer support issues.

- **Campaigns** → Manage PlayStation marketing campaigns and promotions.

2. Custom Objects Created

- **Games** 🎮 → Stores details such as Game Name, Genre, Release Date, and Price.

- **Subscriptions** 🖥 → Tracks gamer subscriptions with fields for Plan Type, Start Date, End Date, and Status.

- **Repairs** 🔧 → Records repair or installation service requests raised by gamers.

3. Relationships Defined

- **Contact → Subscriptions (One-to-Many):** A single gamer can have multiple subscriptions.

- **Contact → Cases (One-to-Many):** A single gamer can raise multiple support issues.

- **Contact ↔ Games (Many-to-Many):** Gamers can play multiple games, and each game can be linked to multiple gamers through a junction object (*Game Participation*).

4. Page Layouts & Compact Layouts

- **Page Layouts:** Customized for Games and Subscriptions to capture detailed data fields.

- **Compact Layouts:** Configured to display key highlights such as Subscription Plan, Status, and End Date at a glance.

Screen 1: Games - Compact Layouts

Search Setup

Setup | Home | Object Manager ⌄

SETUP > OBJECT MANAGER
Games

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

Games Compact Layouts
Compact Layout Assignment
« Back to Games

Help for this Page

Edit Assignment

Primary Compact Layout

The primary compact layout defines the fields that display when this object's records appear as list view items in the mobile app.

Primary Compact Layout: Games Compact Layout

Edit Assignment

Screen 2: Repairs - Page Layouts

Search Setup

Setup | Home | Object Manager ⌄

SETUP > OBJECT MANAGER
Repairs

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

Save ▾ | Quick Save | Preview As... ▾ | Cancel | Undo | Redo | Layout Properties

Quick Find | Field Name

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Section | Last Modified By | Service Type
Blank Space | Owner | Status
Created By | Repairs Name
Gamer | Request Date

Repairs Detail

Standard Buttons: Edit | Delete | Clone | Change Owner | Change Record Type | Printable View | Sharing | Sharing Hierarchy | Edit Labels

Custom Buttons

Information (Header visible on edit only)
Repairs Name GEN-2004-001234   Owner Sample Text

System Information (Header visible on edit only)
Created By Sample Text   Last Modified By Sample Text

Custom Links (Header visible on edit only)

Repair Request Info
Service Type Sample Text
Status Sample Text
Request Date 9/22/2025

Gamer Info
Gamer Sample Text

Mobile Cards (Salesforce mobile only)
Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

Open Activities
New Task | New Event

Subject	Name	Task	Due Date	Status	Priority	Assigned To
Sample Text	Sample Text	✓	9/22/2025, 11:59 AM	Sample Text	Sample Text	Sarah Sample

Screen 3: Subscriptions - Fields & Relationships

Search Setup

Setup | Home | Object Manager ⌄

SETUP > OBJECT MANAGER
Subscriptions

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

Fields & Relationships
10 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact	Contact__c	Lookup(Contact)		✓
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
Gamer	Gamer__c	Lookup(Contact)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Plan Type	Plan_Type__c	Picklist		
Start Date	Start_Date__c	Date		
Status	Status__c	Picklist		
Subscription Name	Name	Auto Number		✓

Phase 4: Process Automation & Business Logic

Overview

After establishing the **Org Setup & Configuration** in Phase 2 and designing the **Data Model & Relationships** in Phase 3, Phase 4 focused on embedding **automation and business logic** into the PlayStation Gaming CRM.

The main objective of this phase was to ensure that the system could automatically handle **repetitive business processes**, enforce **data integrity through validations**, and implement **approval workflows** where managerial intervention is required. This not only reduces manual workload but also improves the **efficiency, accuracy, and reliability** of the CRM.

Automation plays a key role in providing gamers with **timely updates**, ensuring that **support teams respond quickly**, and allowing managers to **maintain control over critical decisions** like discounts and high-cost repairs.

Activities Done

1. Workflow Rules

Workflow rules were used to implement **straightforward, rule-based automations** that run in the background whenever conditions are met.

- **Subscription Expiry Reminder**:
    - Automatically triggers an email notification to the gamer before their subscription expires.
    - Ensures gamers are aware in advance and can renew on time.

- **Repair Update Notification**:
    - Sends an email or in-app notification to gamers when the status of their repair request changes (e.g., *Received → In Progress → Completed*).
    - Keeps gamers informed without manual follow-ups.

---

2. Process Builder

Process Builder allowed us to automate **multi-step logic and updates** beyond simple workflows.

- **Auto Case Assignment**:
    - New support cases raised by gamers are automatically assigned to the *Support Agent* role.

- This eliminates the need for manual routing and ensures faster response times.

- **Auto Field Updates**:

  - Subscription records are automatically updated to *Expired* once the End Date passes.

  - Removes dependency on manual monitoring and ensures accurate reporting.

---

3. Approval Processes

Approval processes introduced **managerial oversight** into business workflows.

- **Discount Approval**:

  - If a gamer requests a subscription discount, the request is routed to the *Marketing Manager* for approval.

  - Prevents unauthorized discounts and maintains consistency.

- **Repair Cost Approval**:

  - Repair requests exceeding a predefined cost limit are sent to the *System Administrator* (Admin) for approval.

  - Ensures budget control and prevents unnecessary expenses.

---

4. Validation Rules

Validation rules were implemented to maintain **data accuracy and completeness**.

- **Mandatory Subscription Dates**:

  - Users cannot save a subscription record unless both the Start Date and End Date are filled.

  - Prevents incomplete records and improves reporting accuracy.

- **Repair Completion Validation**:

  - A repair request cannot be marked as *Completed* unless a valid *Service Date* is entered.

  - Ensures that closed repairs always have complete and reliable information.

---

5. Flows

Flows provided **guided, interactive automation** to help users carry out tasks more efficiently.

- **New Gamer Onboarding Flow**:

  - Step-by-step process for creating a new gamer (Contact), assigning them a subscription, and linking their games.

  - Simplifies onboarding and reduces errors for new records.

- **Repair Logging Flow**:
  - Guides support staff through the repair request creation process by prompting for required details.
  - Ensures all necessary data is captured at the time of logging.

Outcome

At the end of Phase 4, the PlayStation Gaming CRM became **intelligent and automated** rather than just a static data storage system. Key achievements include:

- **Routine tasks automated** → Reduces manual work and ensures efficiency.

- **Business rules enforced** → Approvals and validations guarantee accuracy and accountability.

- **Improved gamer experience** → Gamers receive timely updates on subscriptions and repairs.

- **Operational efficiency increased** → Support and marketing teams can focus on important tasks instead of repetitive manual updates.

This phase successfully transformed the CRM into a **smart system** capable of handling business processes on its own. The environment is now ready for **Phase 5: Reports & Dashboards**, where structured data and automation will be converted into meaningful business insights.

SETUP
Workflow Rules

Workflow Rule
Subscription_Expiry_Reminder

Help for this Page ❓

ℹ️ Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. Tell Me More | Migrate your workflow rules to flows

Workflow Rule Detail
[Edit] [Clone] [Deactivate]

Rule Name	Subscription_Expiry_Reminder	Object	Subscriptions
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Send reminder email 7 days before subscription end date		
Rule Criteria	AND(NOT(ISBLANK(End_Date__c)), End_Date__c >= TODAY())		
Created By	Himanshu Kumar, 9/23/2025, 7:40 AM	Modified By	Himanshu Kumar, 9/23/2025, 7:56 AM

Workflow Actions
[Edit]

Immediate Workflow Actions

No workflow actions have been added.

Time-Dependent Workflow Actions   See an example

📅 7 Days After Subscriptions: End Date

Type	Description
Email Alert	Send expiry email to gamer

⚠️ You cannot add new time triggers to an active rule. Deactivate This Rule

---

SETUP
Email Alerts

Email Alert
Send expiry email to gamer

🖨 Help for this Page ❓

Rules Using This Email Alert [1] | Approval Processes Using This Email Alert [0] | Entitlement Processes Using This Email Alert [0]

Email Alert Detail
[Edit] [Delete] [Clone]

Description	Send expiry email to gamer	Email Template	Subscription_Expiry_Notice
Unique Name	Send_expiry_email_to_gamer	Object	Subscriptions
From Email Address	Current User's email address		
Recipients	User: Himanshu Admin Related Contact: Gamer		
Additional Emails			
Created By	Himanshu Kumar, 9/23/2025, 7:50 AM	Modified By	Himanshu Kumar, 9/23/2025, 7:50 AM

[Edit] [Delete] [Clone]

Rules Using This Email Alert
Rules Using This Email Alert Help ❓

Action	Rule Name	Description	Object	Active
Edit	Deactivate	Subscription_Expiry_Reminder	Send reminder email 7 days before subscription end date	Subscriptions	✓

Approval Processes Using This Email Alert
Approval Processes Using This Email Alert Help ❓

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active

▲ Back To Top

Always show me fewer ▲ / ▼ more records per related list

SETUP
Approval Processes

Approval Processes
Subscriptions

Help for this Page

Try Flow Approval Processes!

Introducing **Flow Approval Processes**, an enhanced alternative to classic Approval Processes.

- **Flexible, User-Friendly Interface:** Create everything your approval process needs in Flow Builder.
- **Record-Change Triggers:** Automate approvals based on specific record updates.
- **Apex Extensibility:** Customize with Apex for advanced functionality.
- **Detailed Logging:** Ensure compliance with comprehensive audit trails.
- **Dynamic Routing:** Route approvals based on data and business rules.

Get started with Flow Approval Processes in the Approval app where you can manage approval submissions, approval work items, and flow approval processes in one location.

[Open Approvals App]

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.
1. Read the help topic
2. View the checklist
3. Create a custom user hierarchical relationship field
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: [Subscriptions ⌄]

A listing of both active and inactive approval processes for **Subscriptions** is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

[Create New Approval Process ▼]

Active Approval Processes
[Reorder]

Action	Process Order	Approval Process Name	Description
Edit | Deactivate	1	Subscription Discount Approval	Approval process for discount requests on Subscriptions

Inactive Approval Processes

SETUP
Approval Processes

Approval Processes
Subscriptions: Subscription Discount Approval

Help for this Page

« Back to Approval Process List

Process Definition Detail

[Edit ▼] [Clone] [Deactivate]

Process Name	Subscription Discount Approval
Unique Name	Subscription_Discount_Approval
Description	Approval process for discount requests on Subscriptions
Entry Criteria	Subscriptions: Discount Requested GREATER THAN 0
Record Editability	Administrator ONLY
Approval Assignment Email Template	
Initial Submitters	Subscriptions Owner
Created By	Himanshu Kumar, 9/23/2025, 11:15 PM

Active	✓
Next Automated Approver Determined By	
Allow Submitters to Recall Approval Requests	
Modified By	Himanshu Kumar, 9/23/2025, 11:31 PM

Initial Submission Actions

[Add Existing] [Add New ▼]

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit | Remove	Field Update	Set Approval Status Pending
Edit | Remove	Email Alert	Notify Marketing Manager of new discount request

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions | Edit	1	Marketing Manager Approval Step	Step for Marketing Manager to approve subscription discount requests.		User: Sarah Marketing	Final Rejection

Final Approval Actions

[Add Existing] [Add New ▼]

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit | Remove	Email Alert	Subscription_Discount_Approved_Alert
Edit | Remove	Field Update	Apply Discount
Edit | Remove	Field Update	Set Status Approved

Final Rejection Actions

[Add Existing] [Add New ▼]

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit | Remove	Field Update	Set Status Rejected
Edit | Remove	Field Update	Reset Discount Requested
Edit | Remove	Email Alert	Subscription_Discount_Rejected_Alert

Recall Actions

[Add Existing] [Add New ▼]

Action	Type	Description
	Record Lock	Unlock the record for editing

« Back To Top

Always show me fewer ▲ / ▼ more records per related list

Validation Rules
1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Mandatory_Dates	Top of Page	Error Detected	✓	Himanshu Kumar, 9/24/2025, 12:59 AM

Subscriptions Validation Rule
Back to Subscriptions

Help for this Page ❓

Validation Rule Detail   [Edit] [Clone]

Rule Name	Mandatory_Dates	Active	✓
Error Condition Formula	OR(ISBLANK(Start_Date__c), ISBLANK(End_Date__c))		
Error Message	Error Detected	Error Location	Top of Page
Description	Prevent saving Subscription unless Start Date and End Date are provided.		
Created By	Himanshu Kumar, 9/24/2025, 12:59 AM	Modified By	Himanshu Kumar, 9/24/2025, 12:59 AM

[Edit] [Clone]

SETUP
Flows

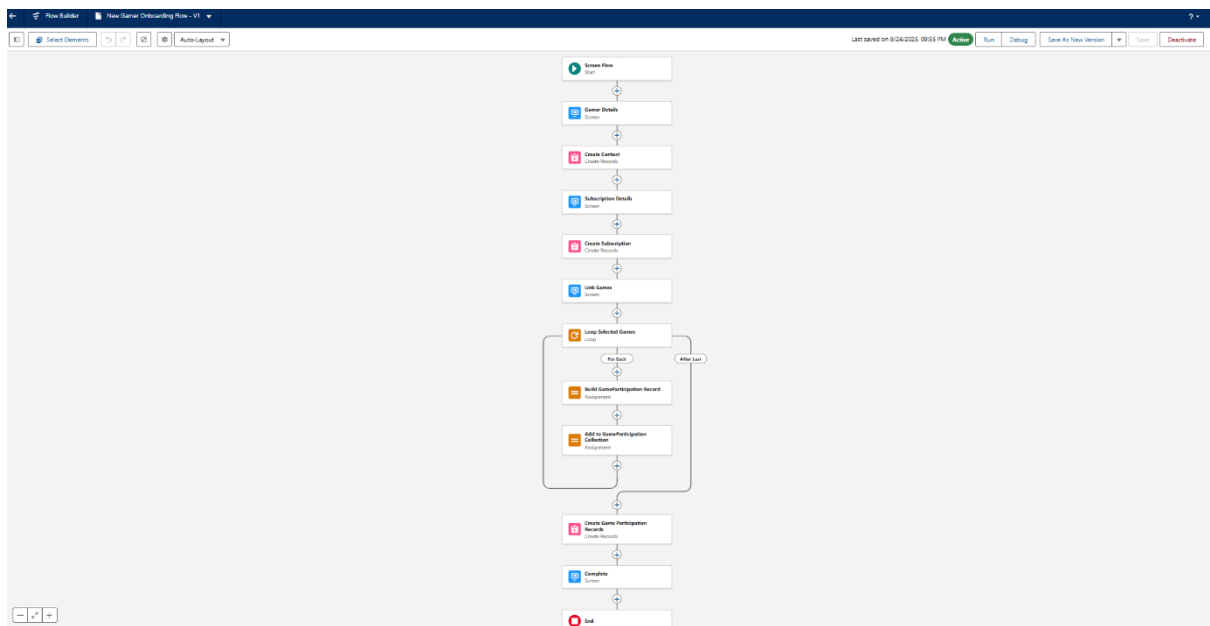Flow Trigger Explorer   New Flow

Flow Definitions
All Flows ▾ 📌

50+ items • Sorted by Last Modified Date • Filtered by All flow definitions • Updated a few seconds ago

Flow Label	Process Type	Active	Template	Package State	Packag...	Last Modified By	Last Modified Date ↓
New Gamer Onboarding Flow	Screen Flow	✓	☐	Unmanaged		Himanshu Kumar	9/24/2025, 9:25 AM
Auto Expire Subscriptions	Autolaunched Flow	✓	☐	Unmanaged		Himanshu Kumar	9/23/2025, 10:55 AM