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Day 8 – Assignment 2

Objective: Understand Sales and Service Cloud features, build reports and dashboards, and configure security settings for data protection.

Tasks:

1. Enable Sales Cloud and configure key features:

* Lead, Opportunity, and Contact Management
* Configure Sales Path or Sales Process

1. Enable Service Cloud and set up and simple Case Management Process:

* Create Case Record Types and assignment rules

1. Build 2 custom reports and combine them into a dashboard:

* Leads by Source
* Case by priority and Status

1. Apply Salesforce Security Settings:

* Field-level security for sensitive fields (Ex: Revenue)
* Objects-level permissions for Service Agents
* Enable Login IP restrictions for added security

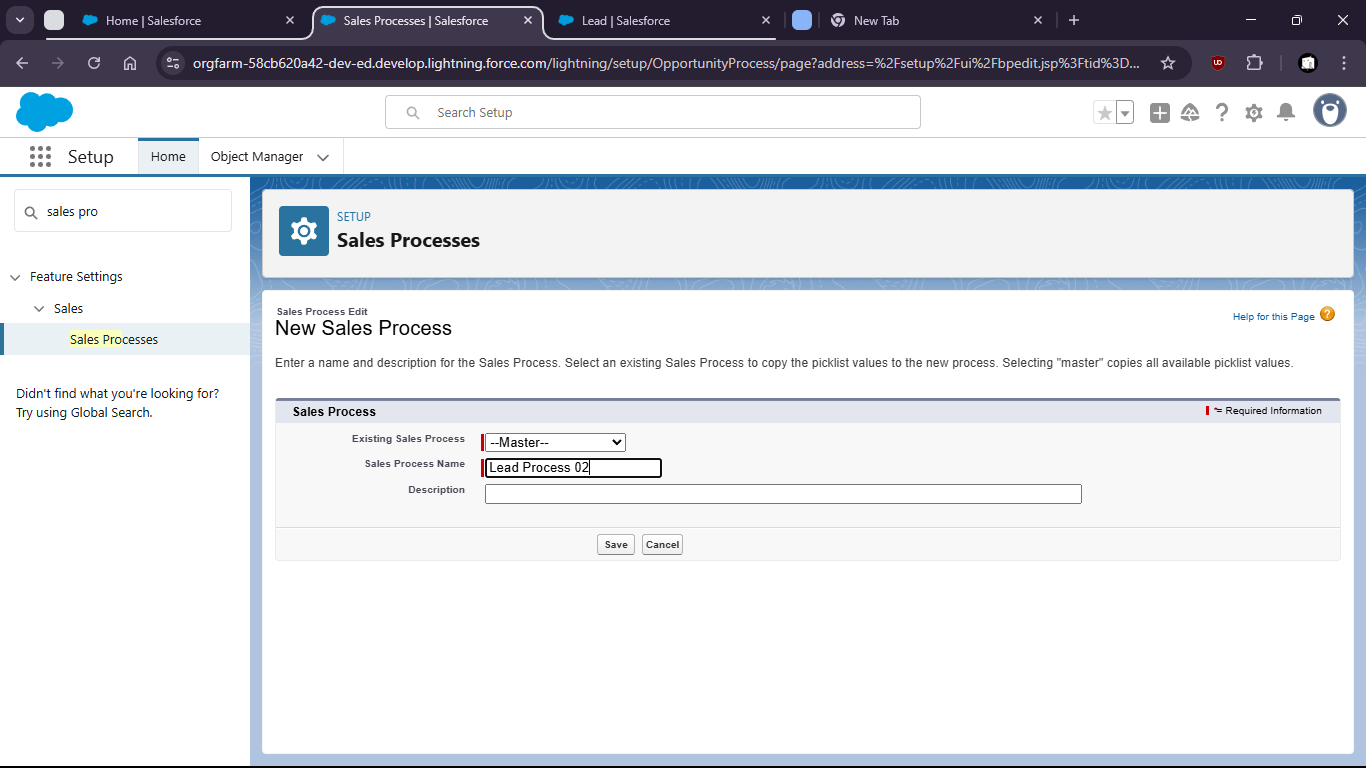
Deliverables:

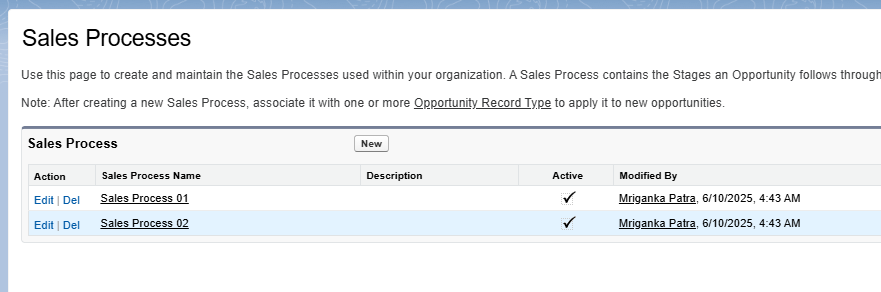
* Screenshots/config steps for Sales & Service Cloud features
* Dashboard visual and reports
* Security configuration documentation

Task 1: Enable Sales Cloud and configure key features:

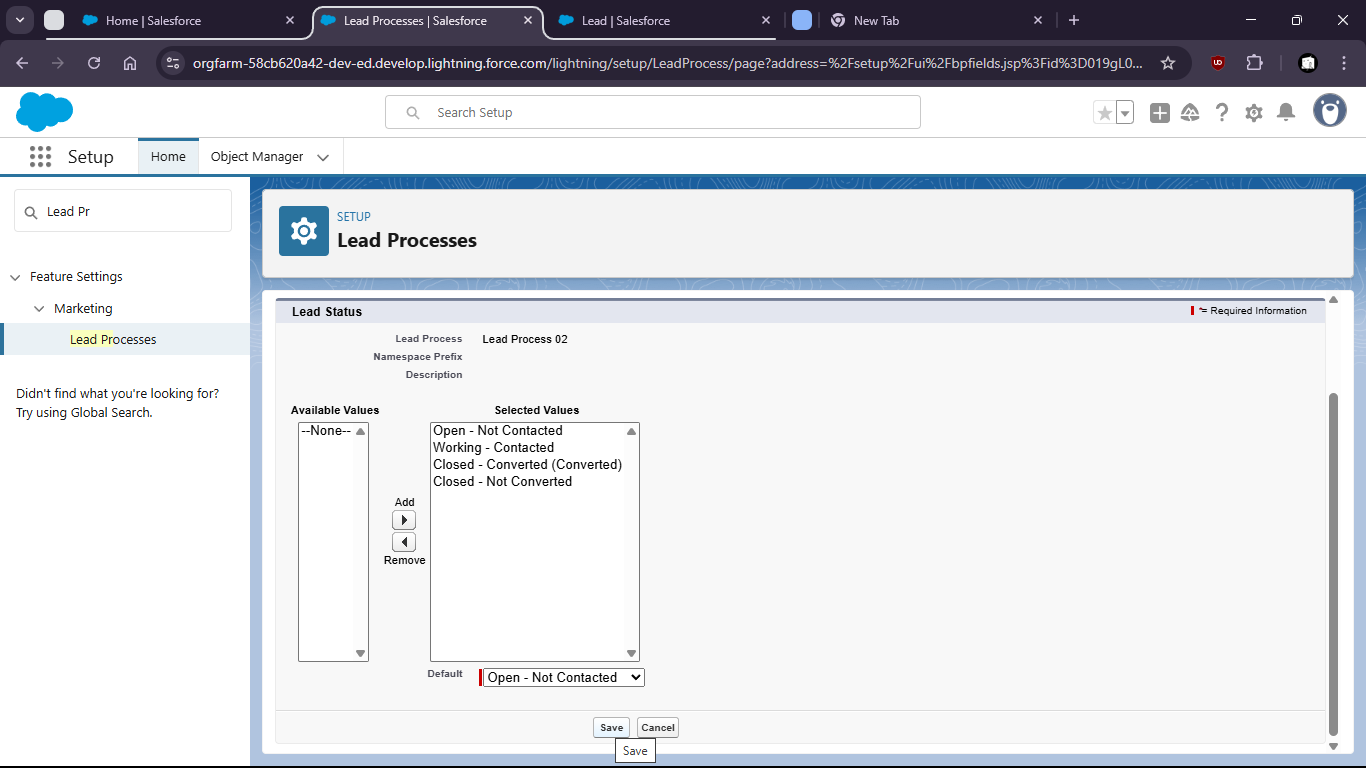
* Lead, Opportunity, and Contact Management
* Configure Sales Path or Sales Process

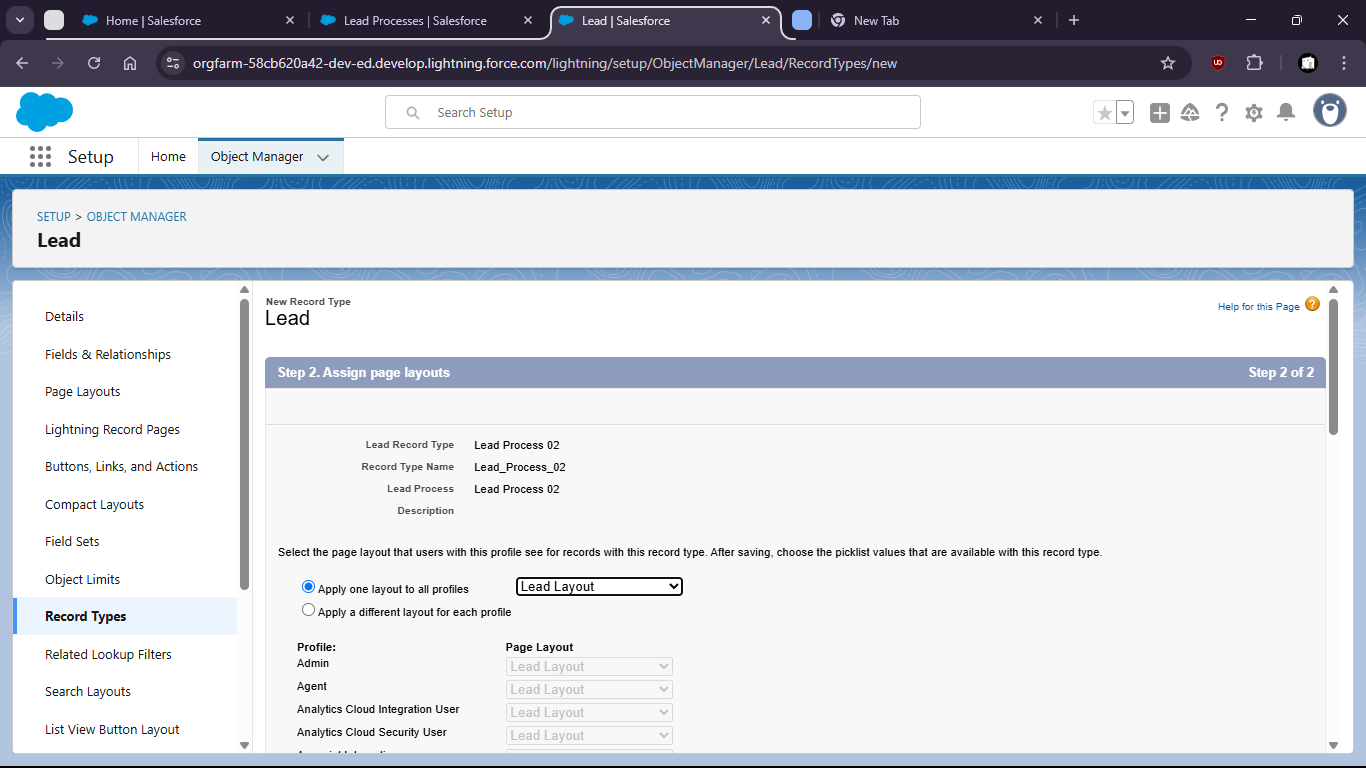
Sales Process :



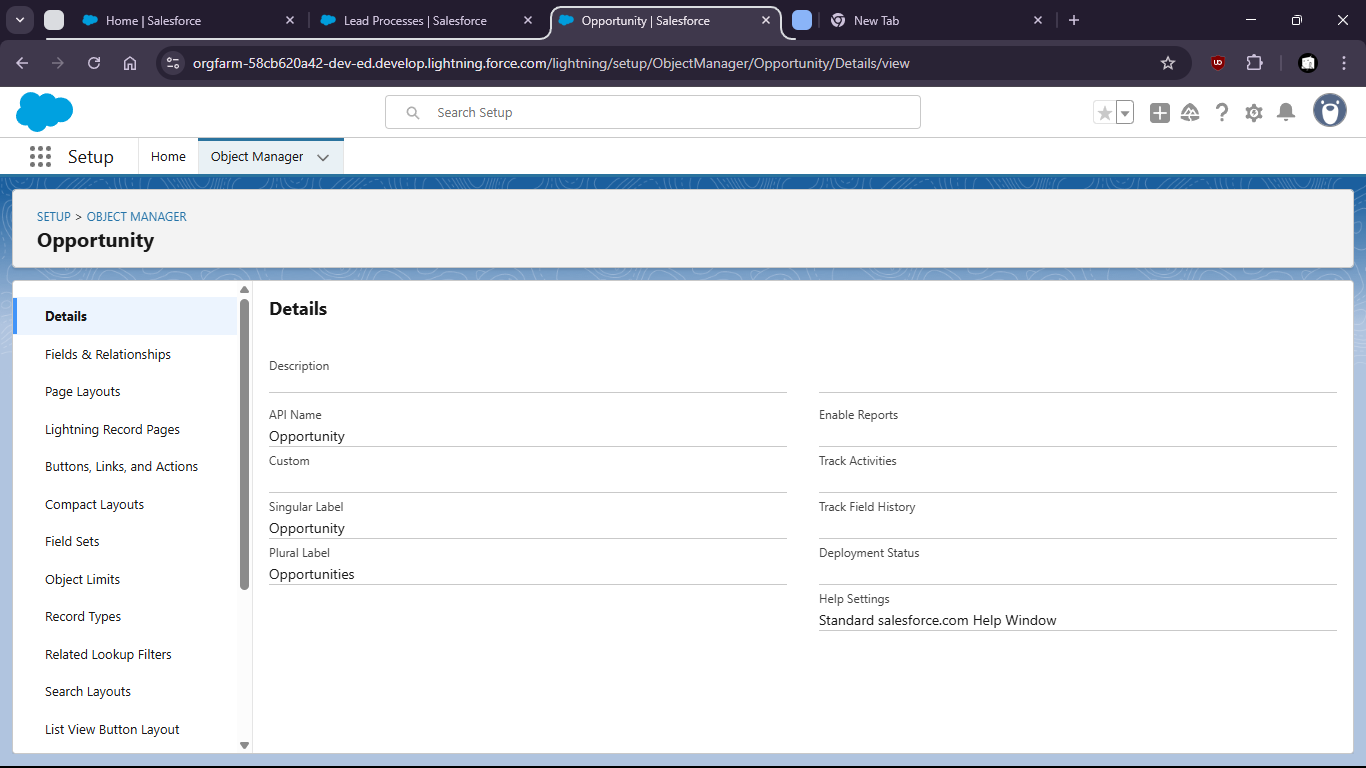


Lead Process:

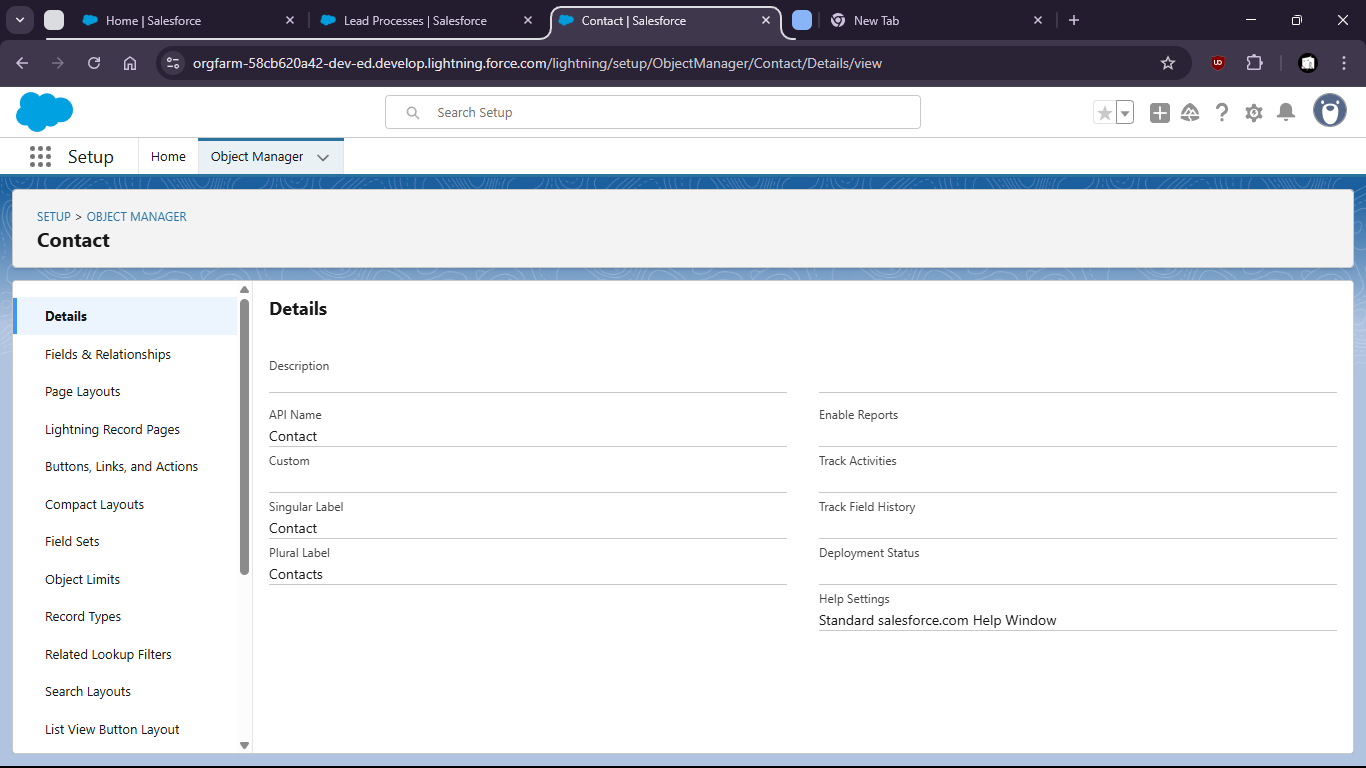


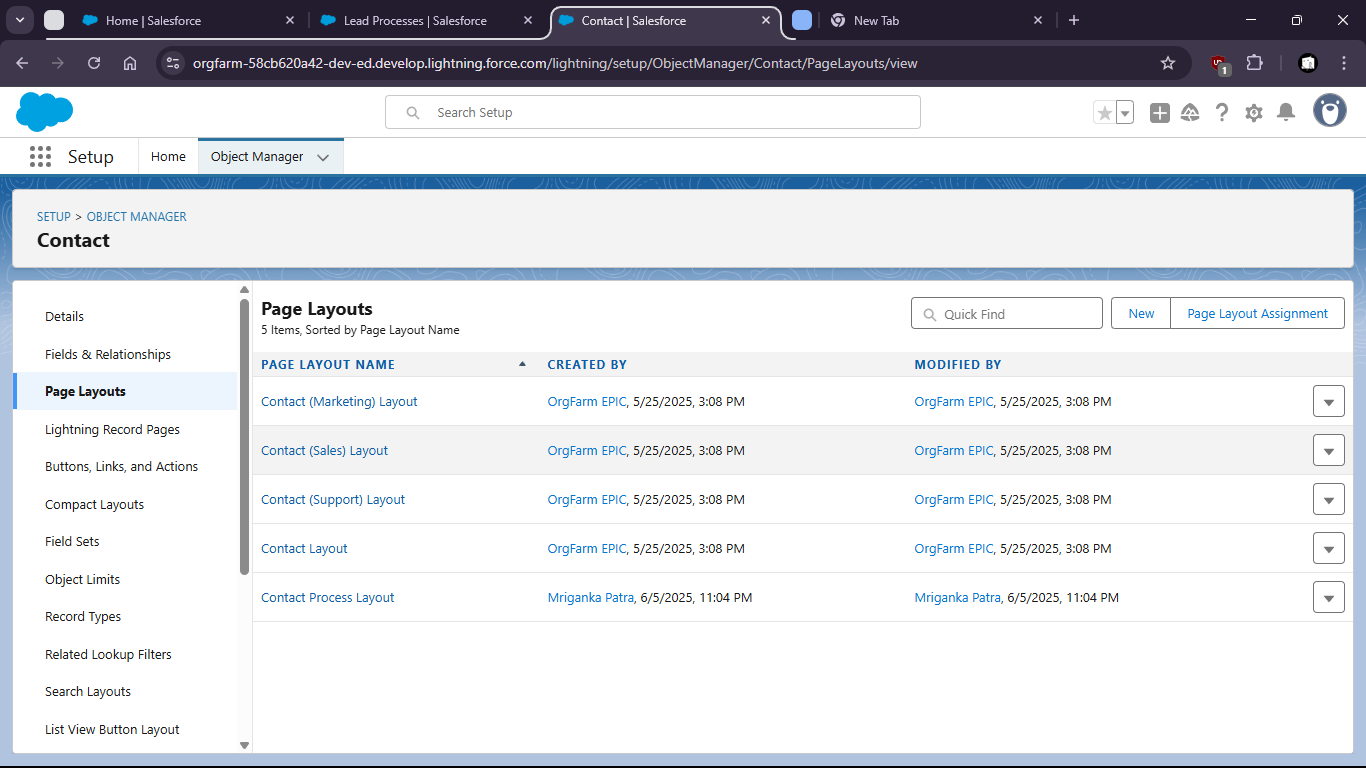


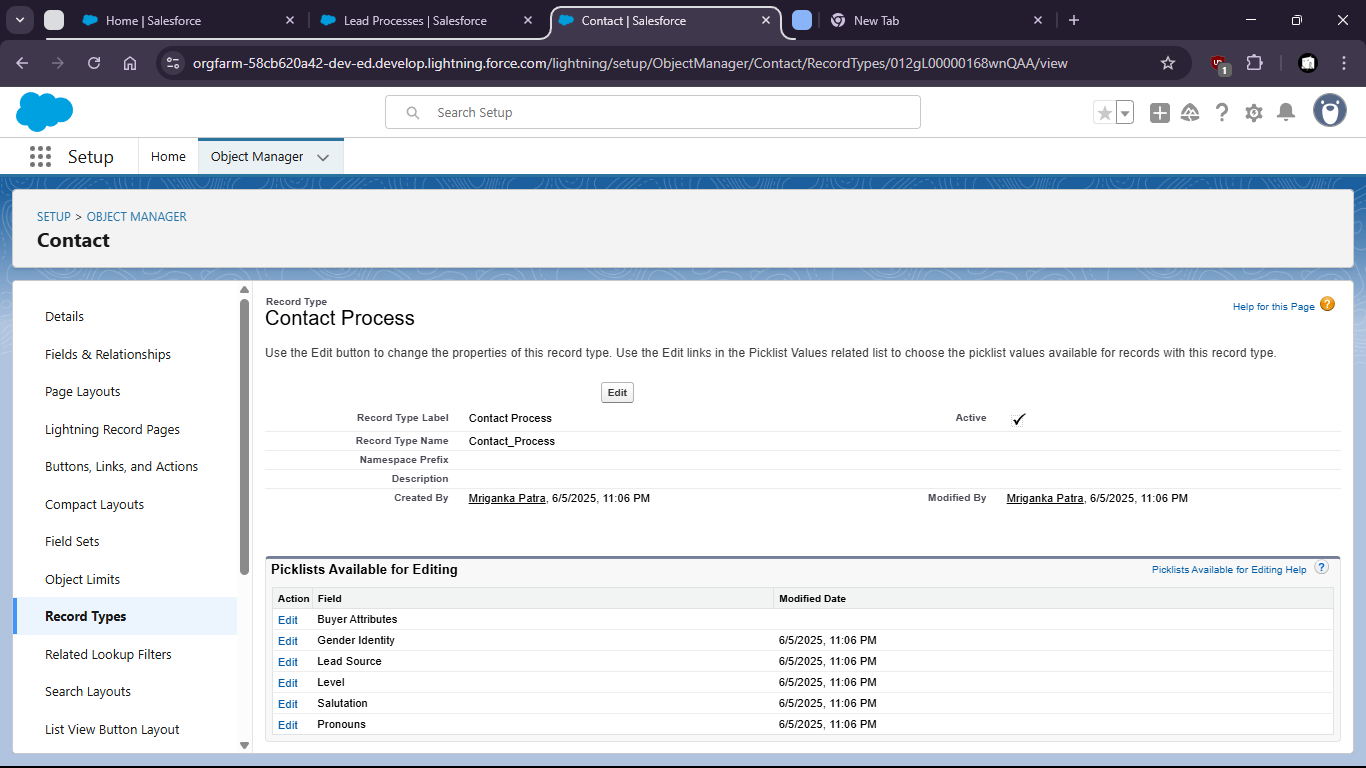
Oppurtunity:



Contact:

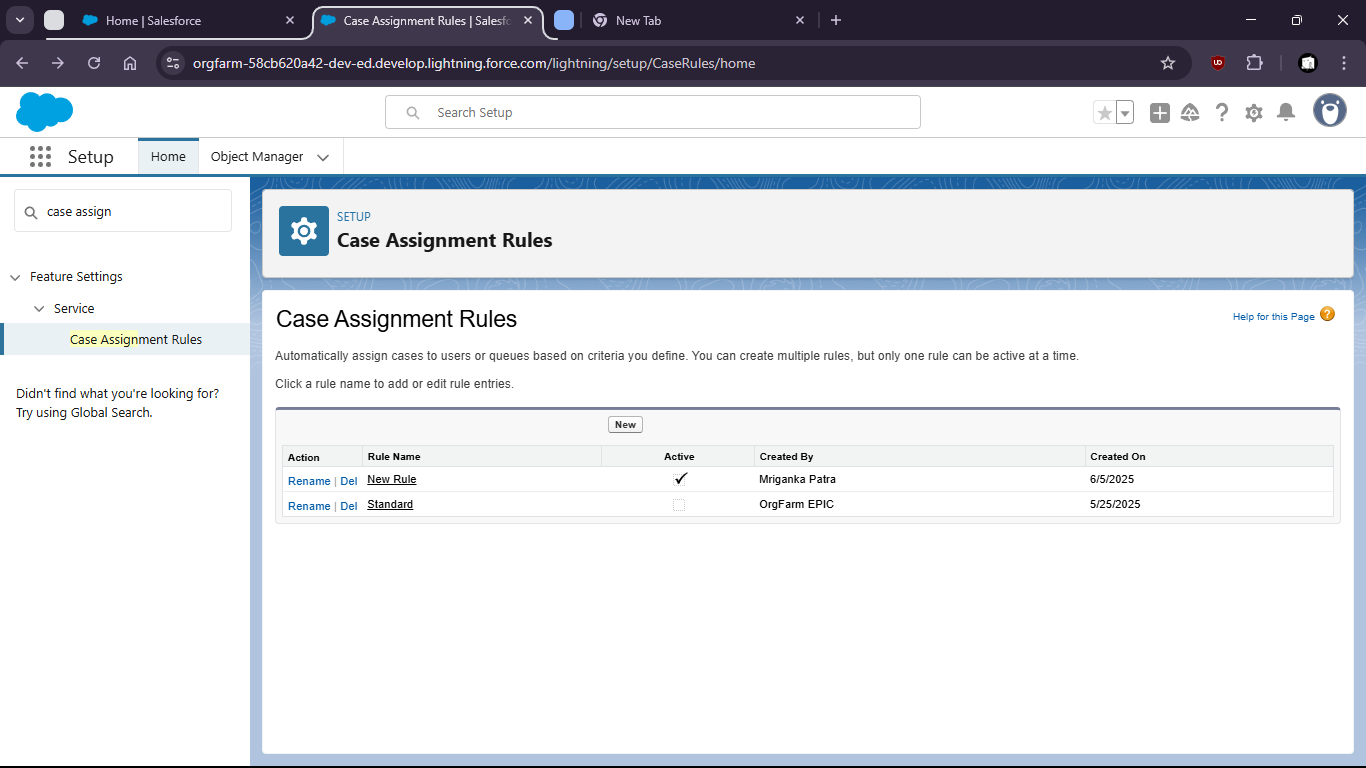


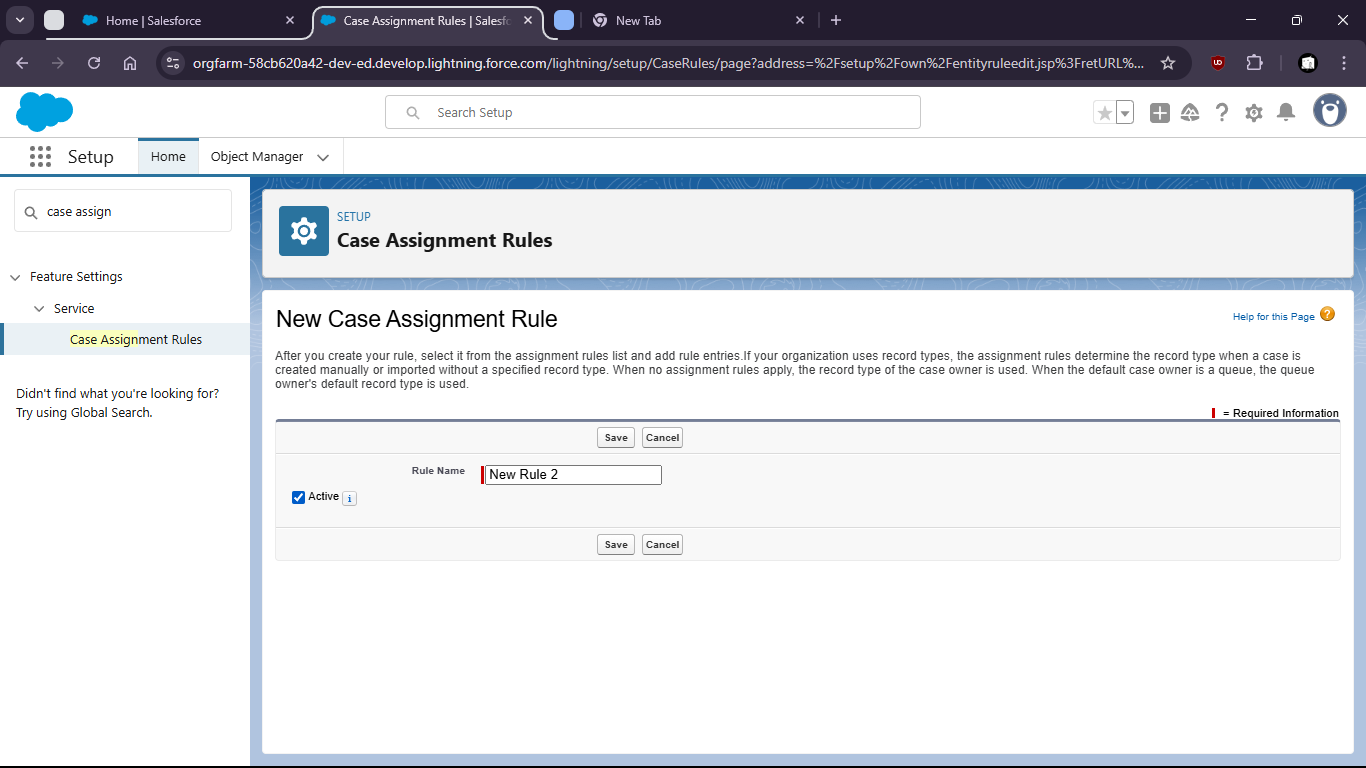


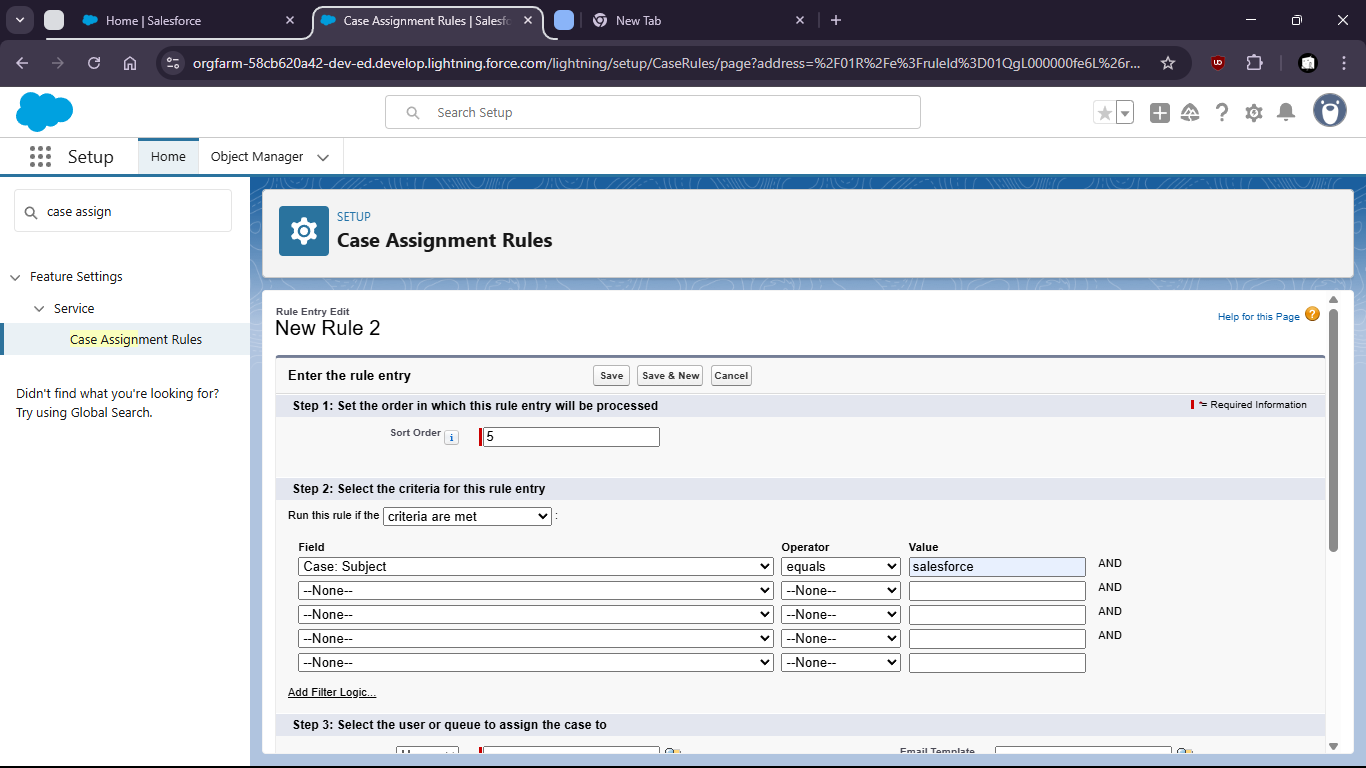


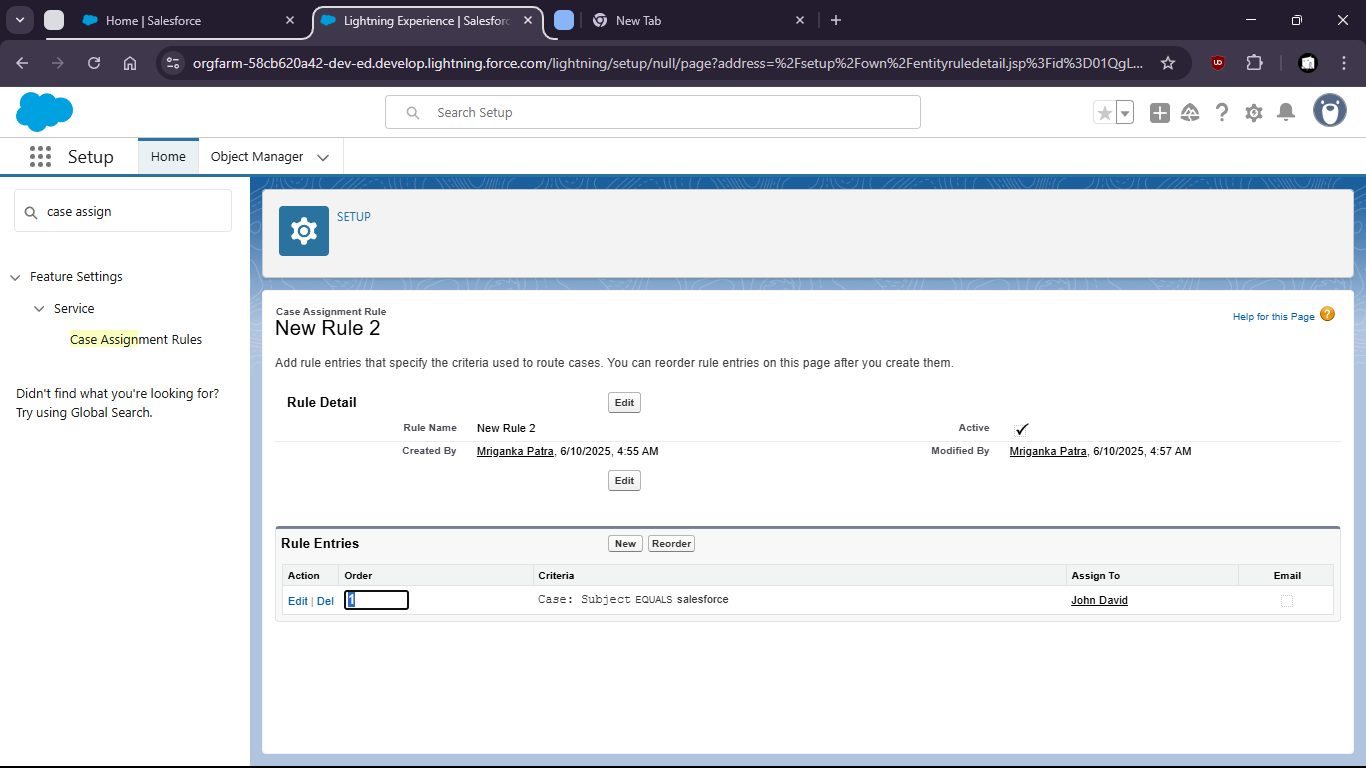
Task 2: Enable Service Cloud and set up and simple Case Management Process:

* Create Case Record Types and assignment rules



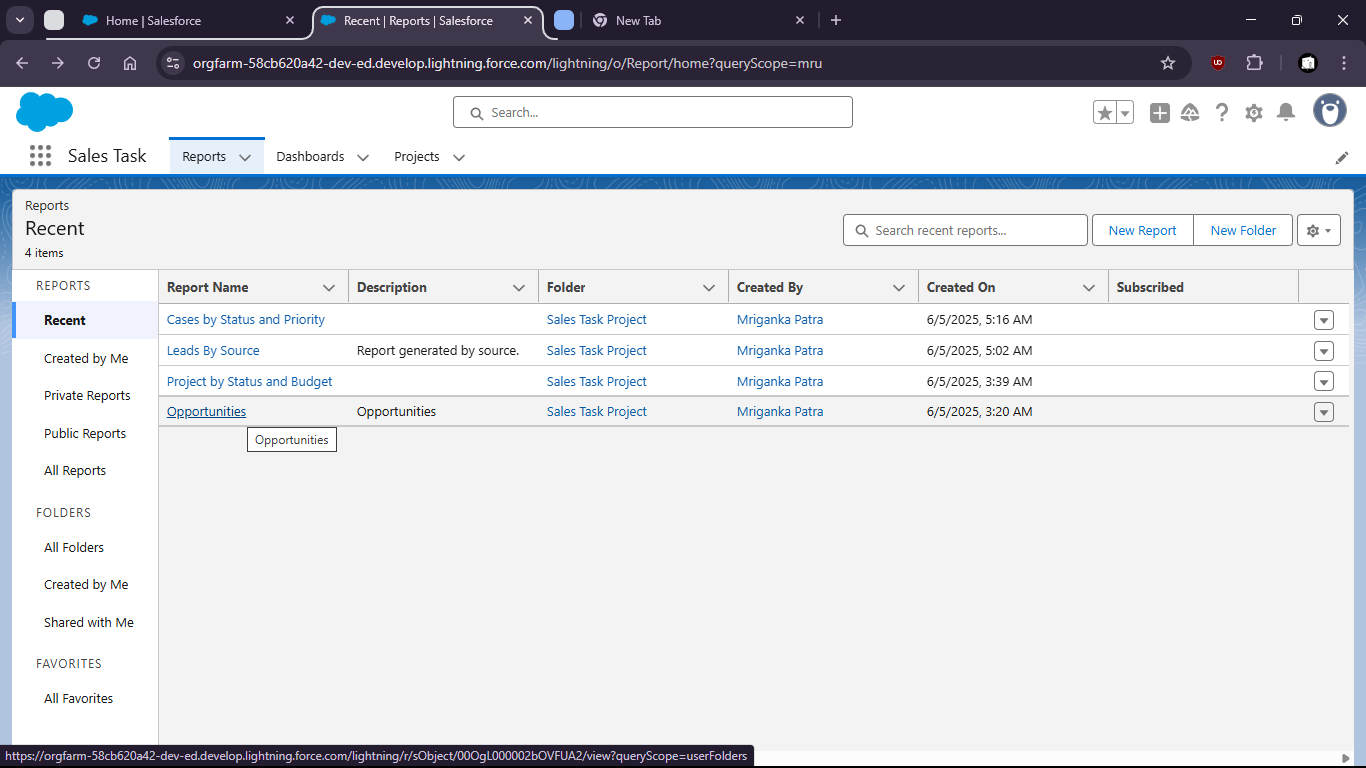


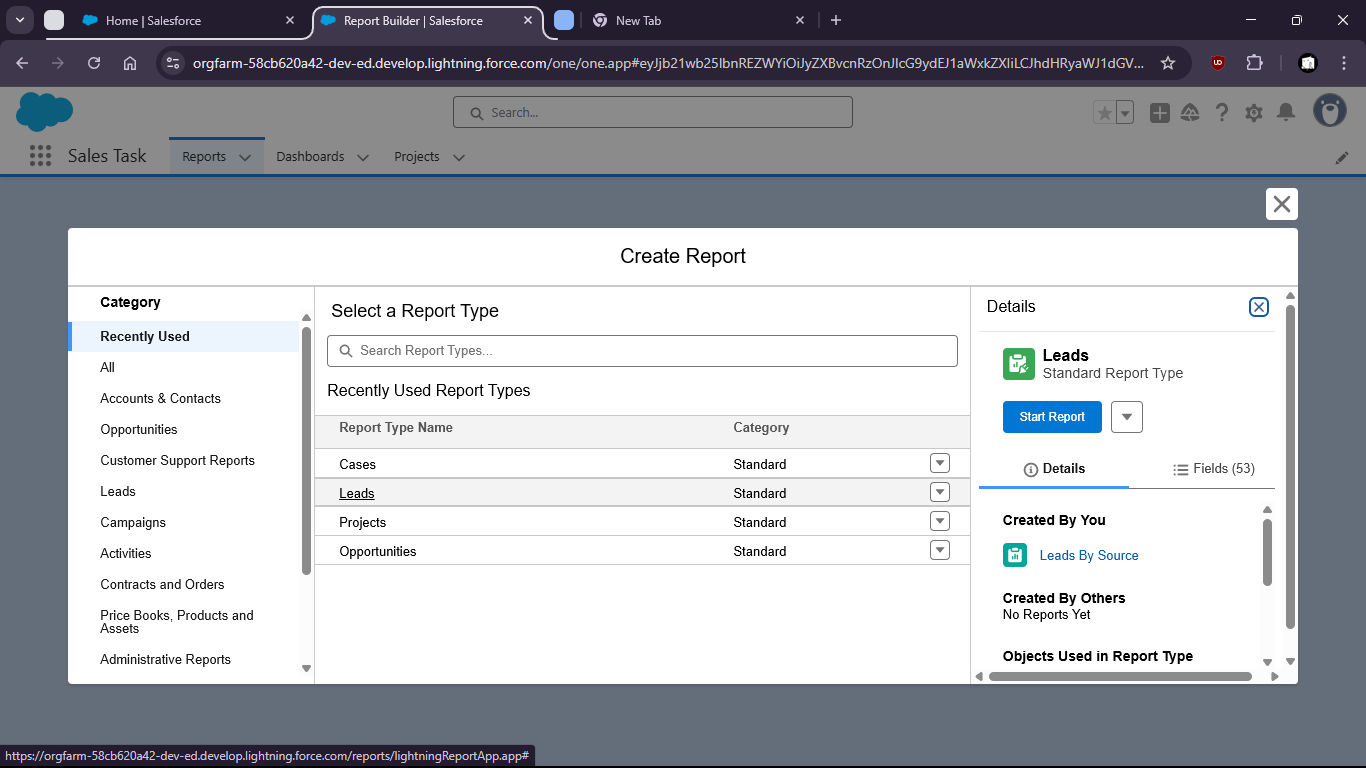


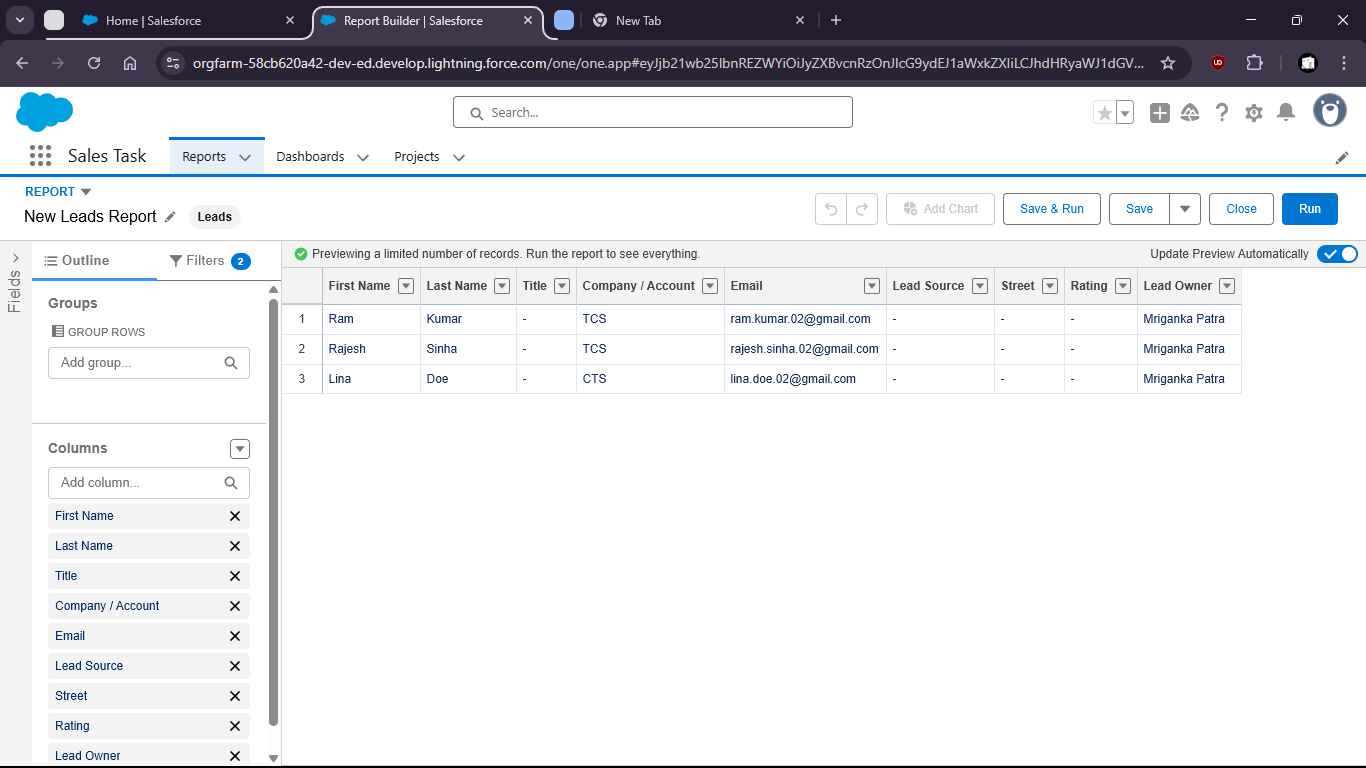


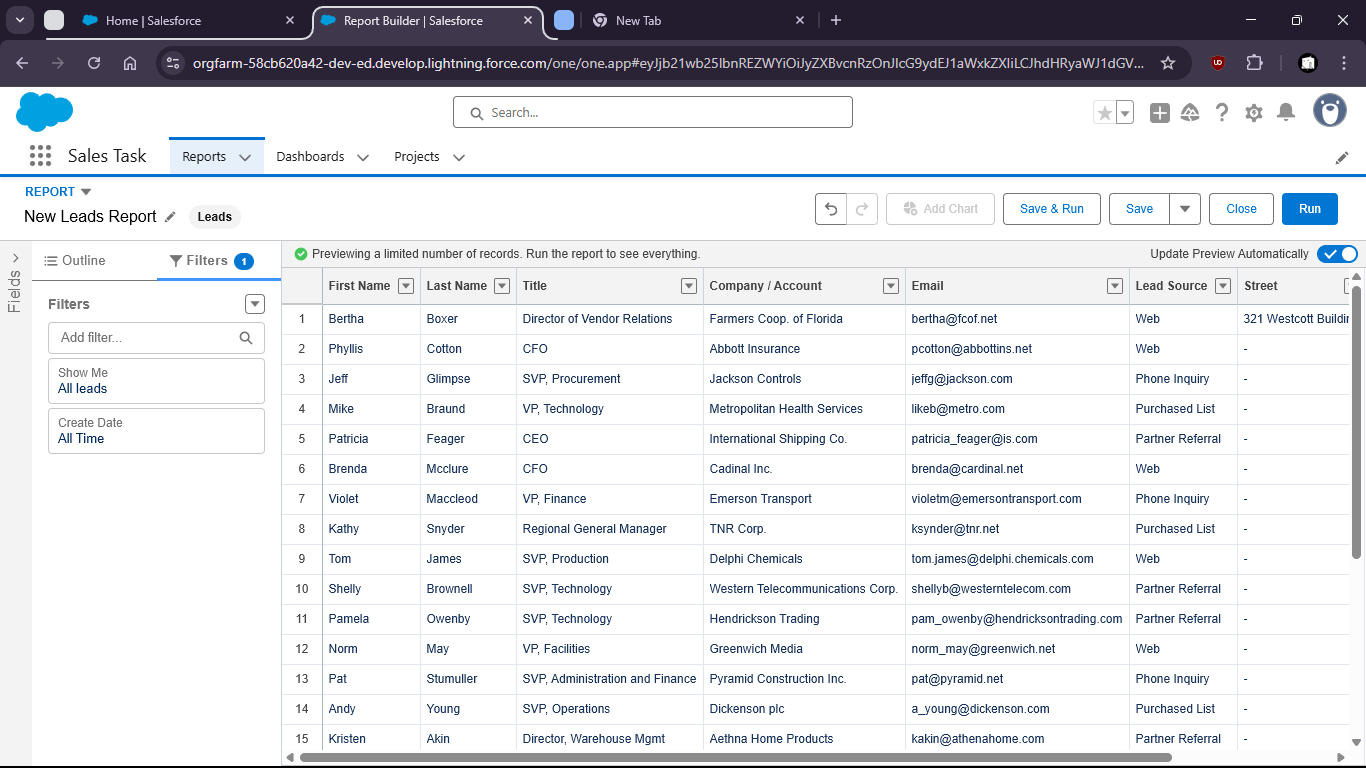
Task 3: Build 2 custom reports and combine them into a dashboard:

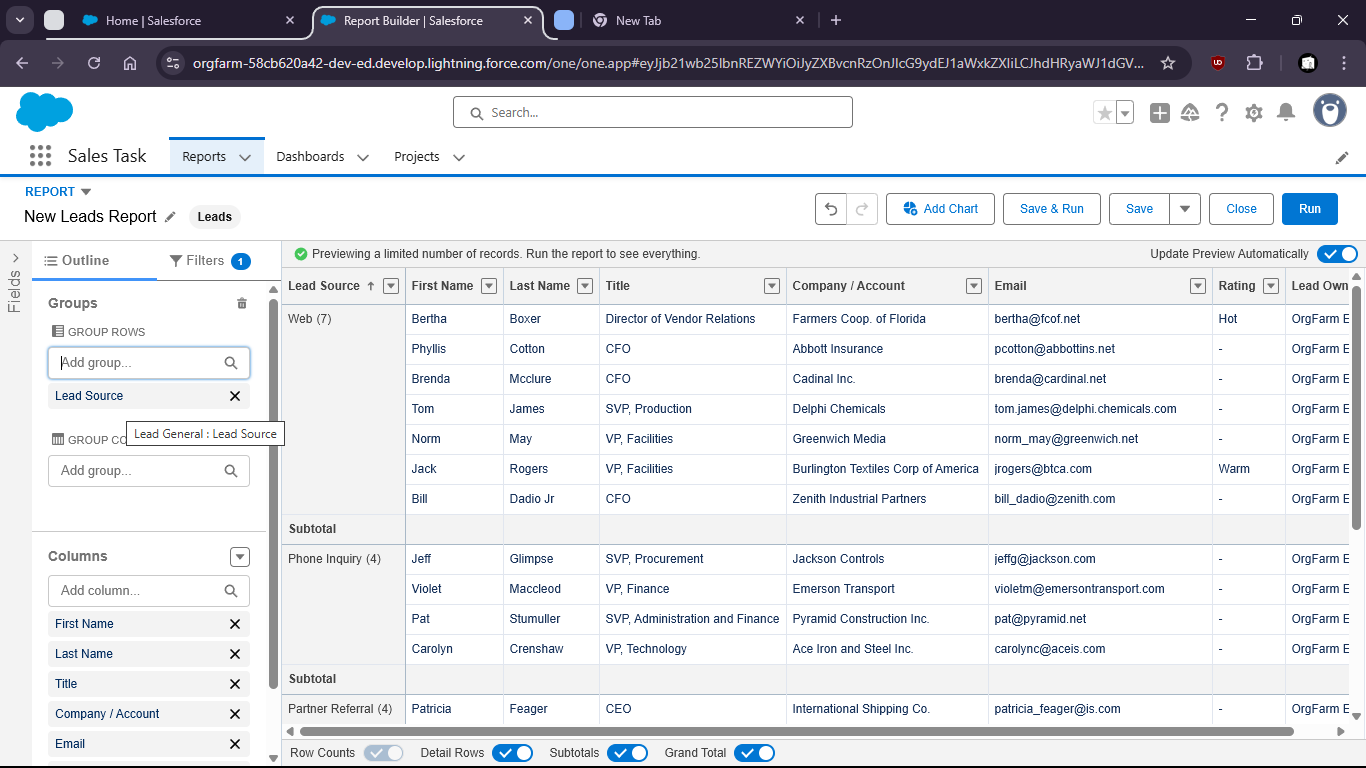
* Leads by Source
* Case by priority and Status

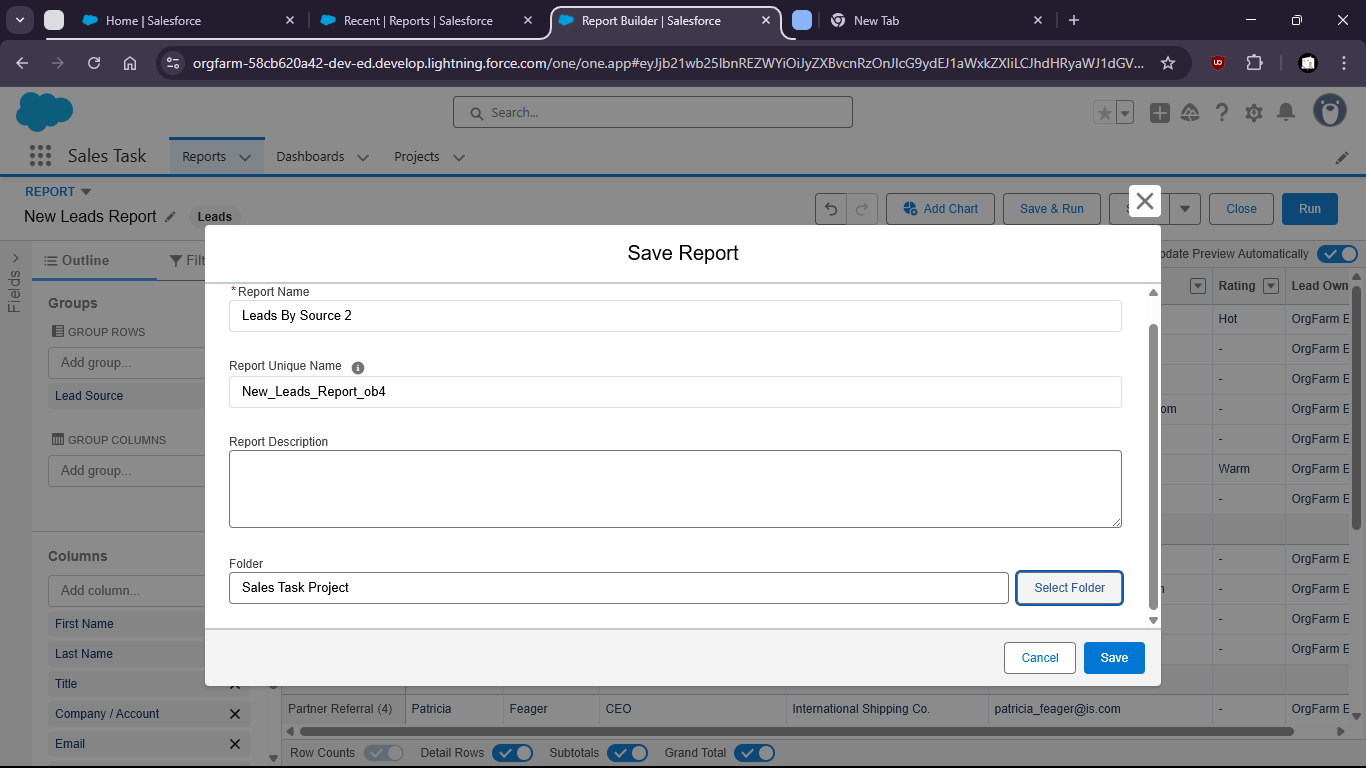


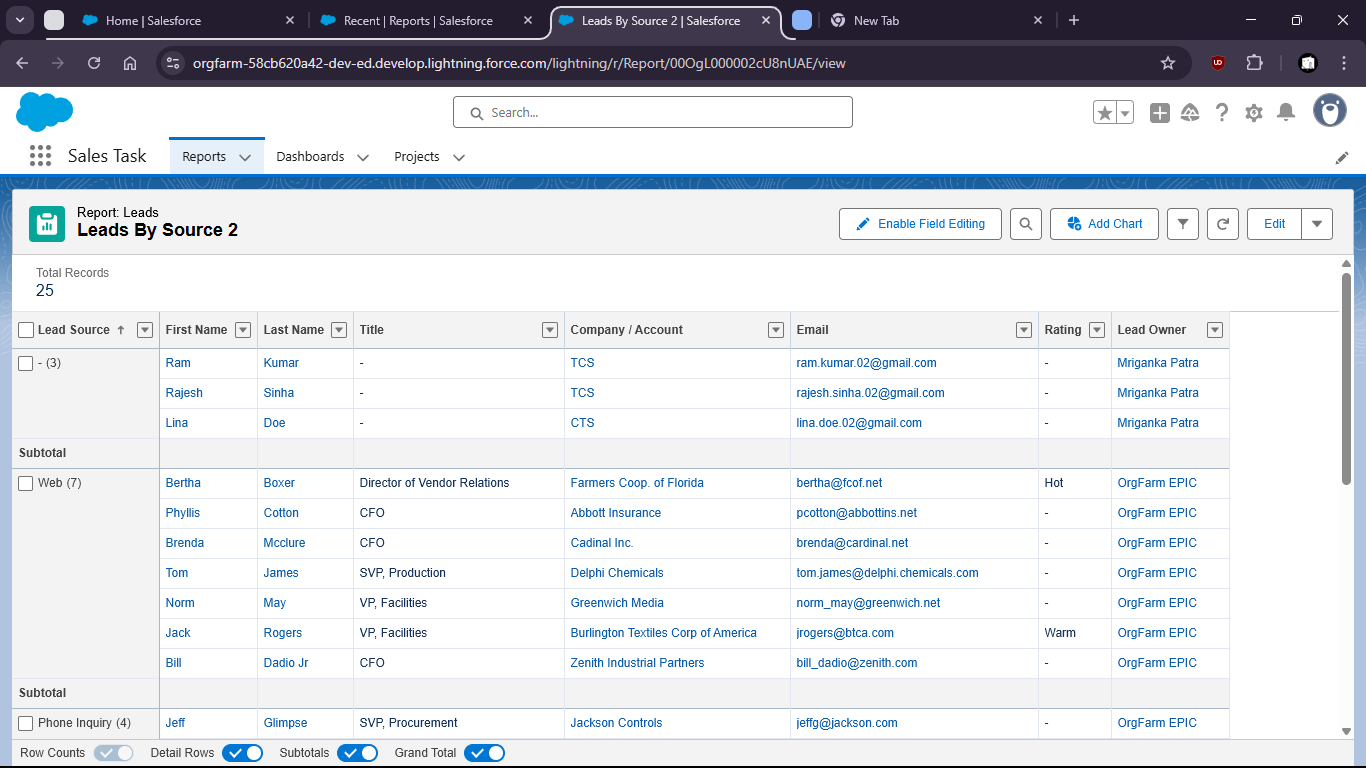




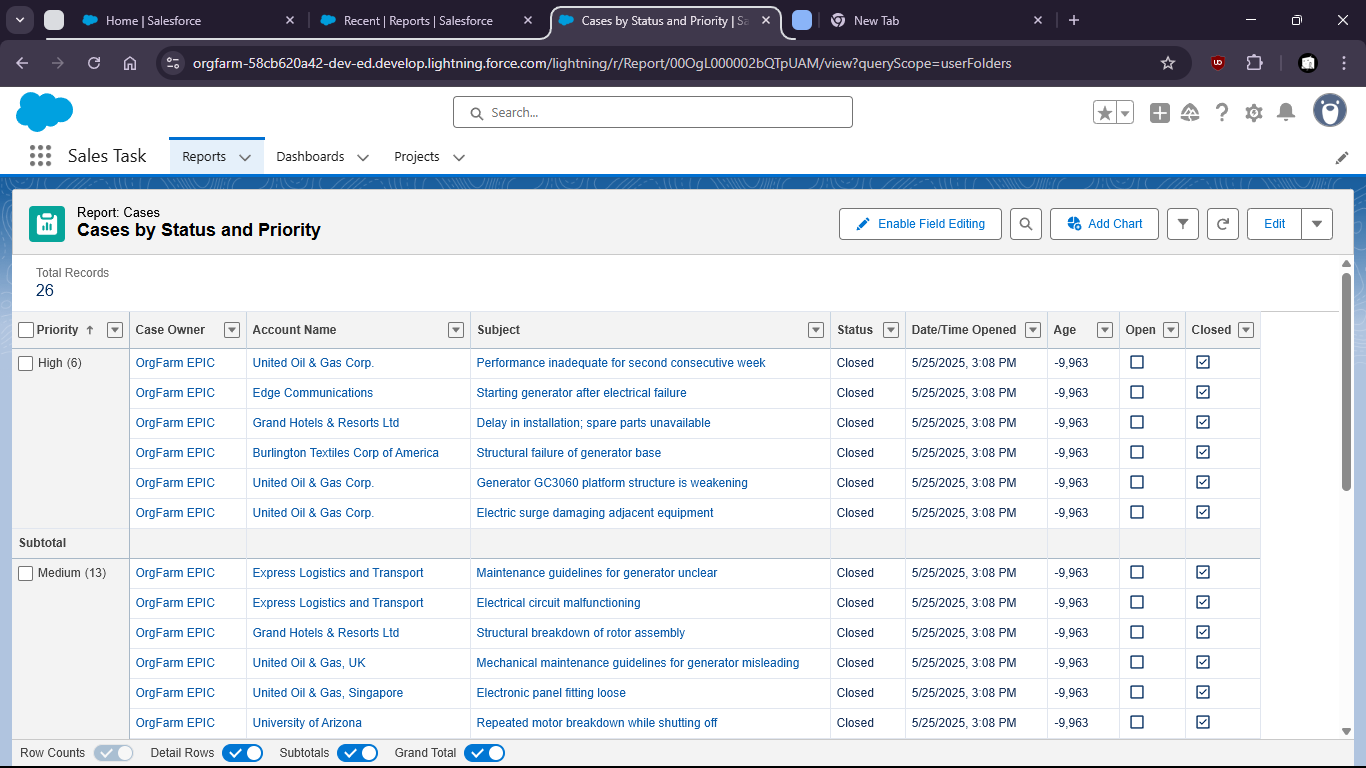




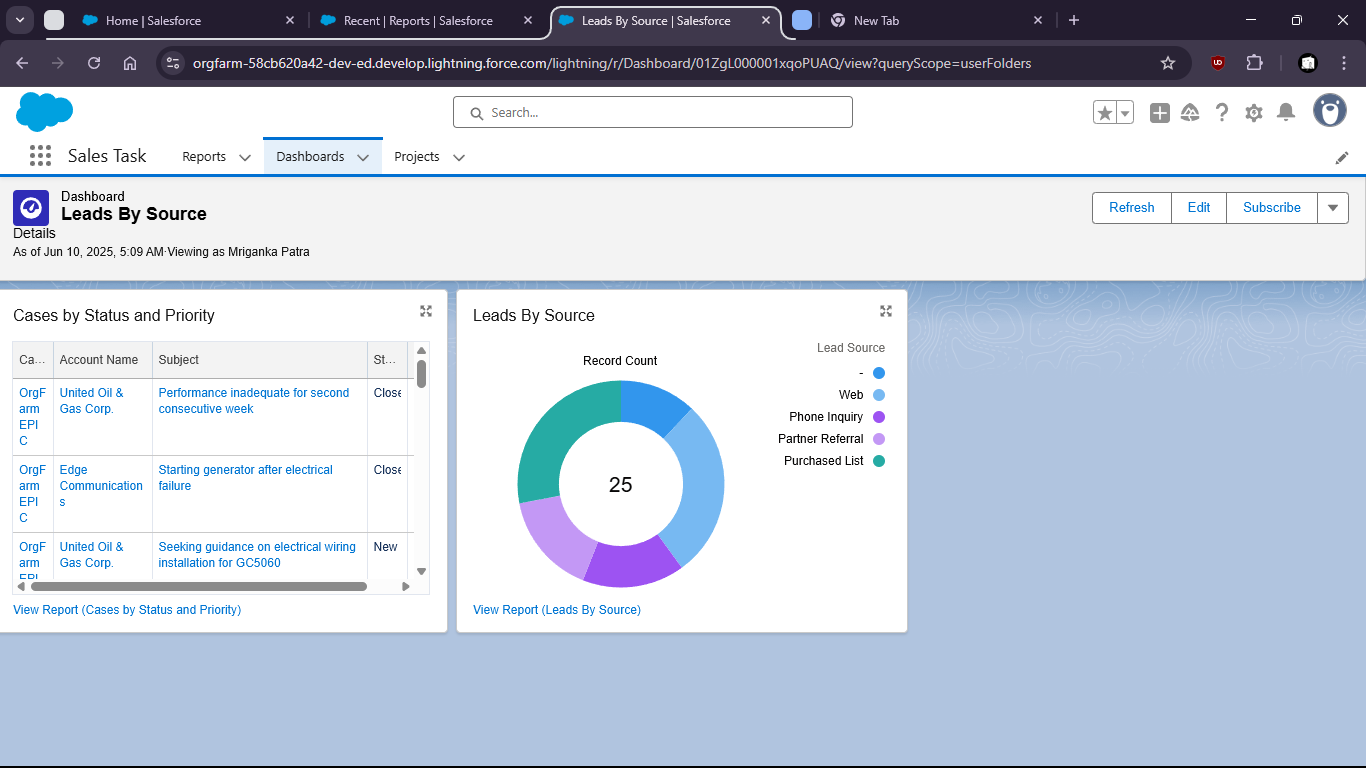




Cases By Priority and Status:

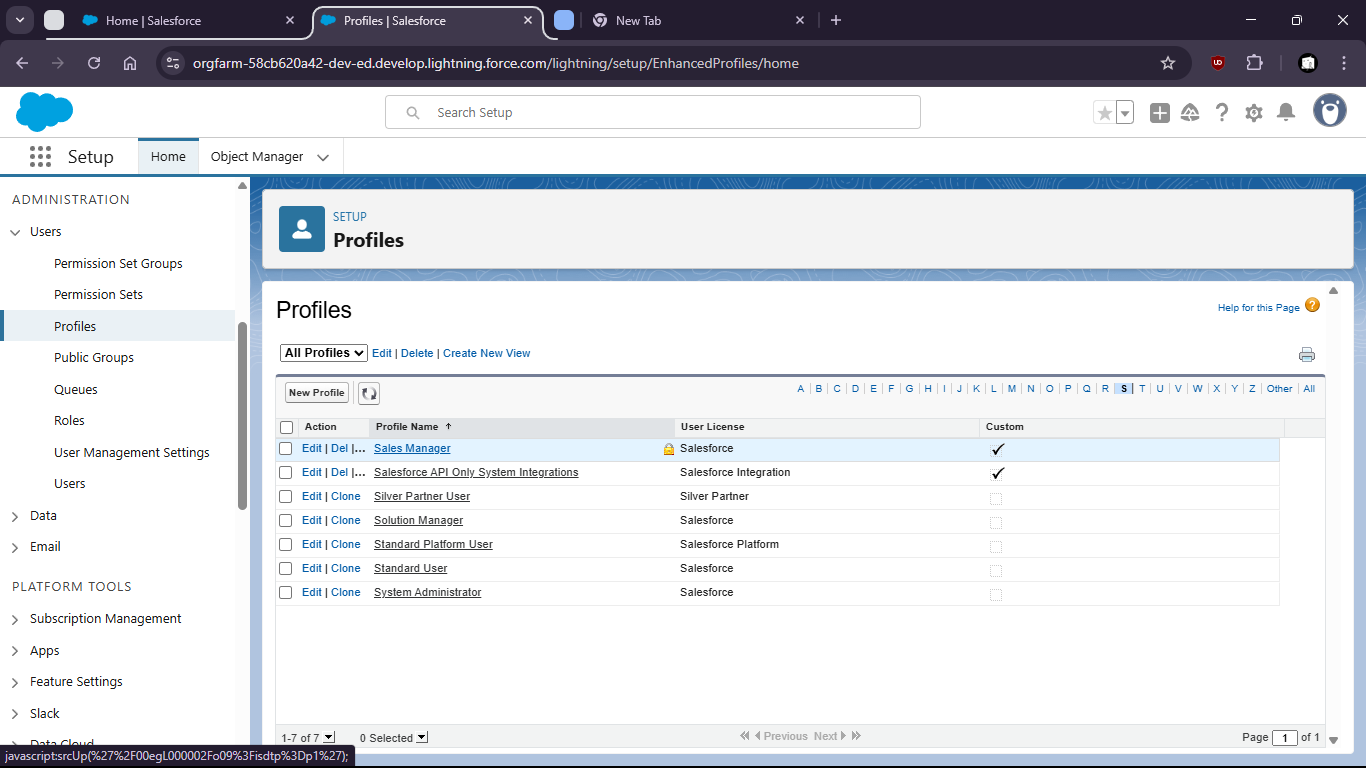


Dashboard View:

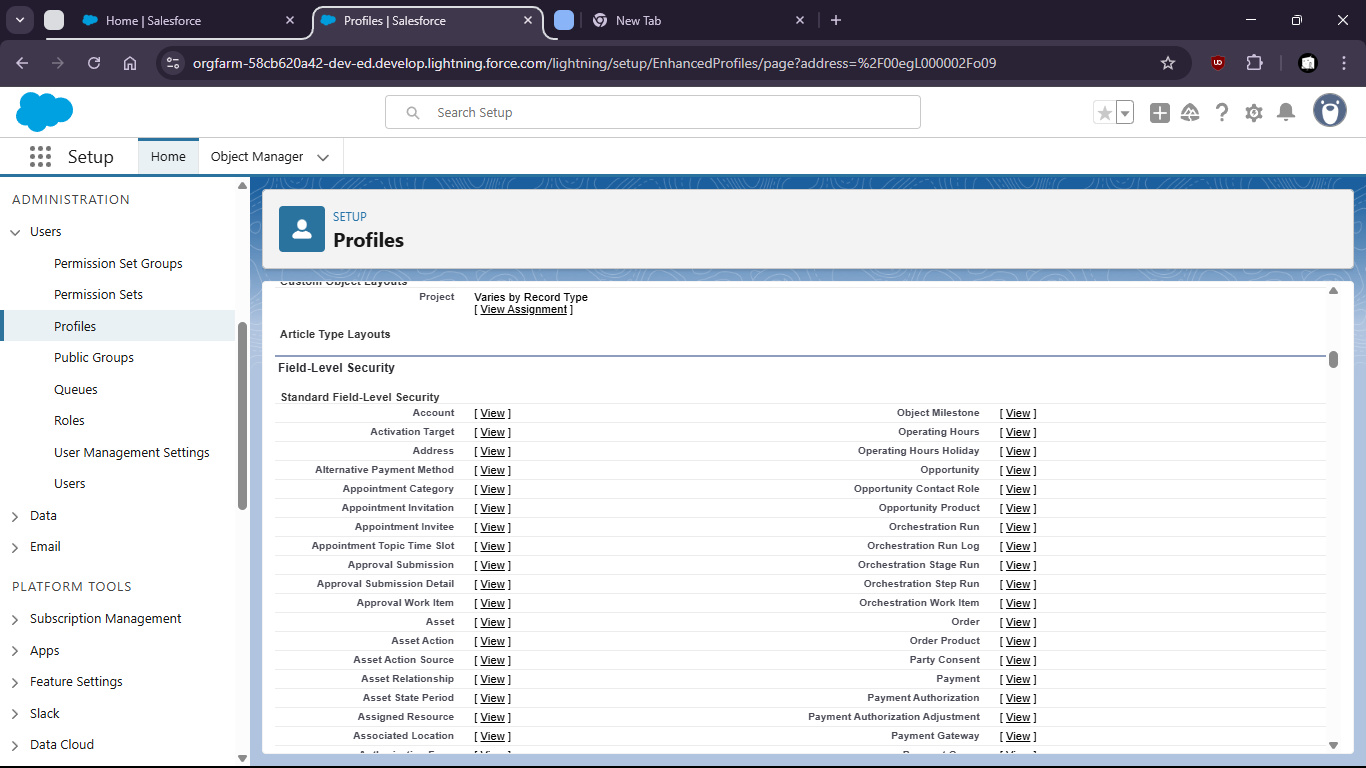


Task 4: Apply Salesforce Security Settings:

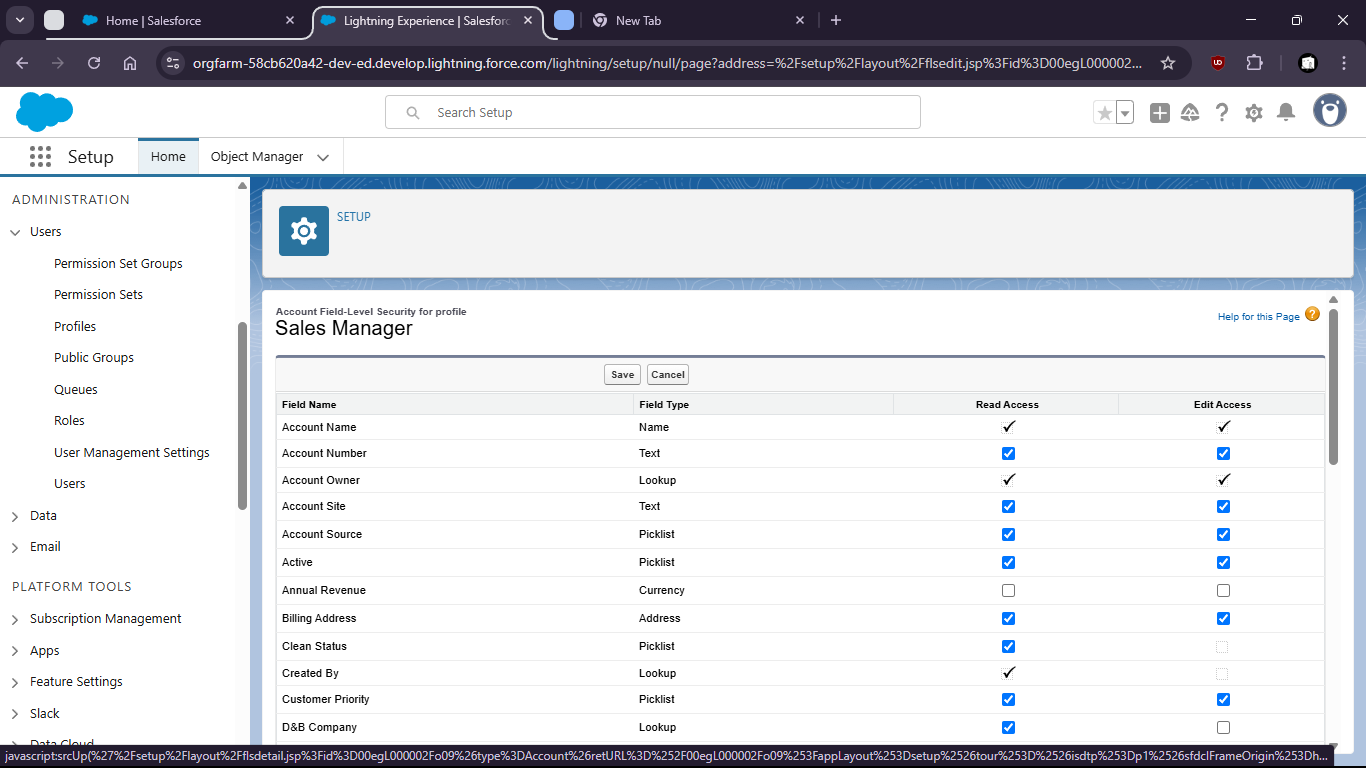
* Field-level security for sensitive fields (Ex: Revenue)



Field Level Security

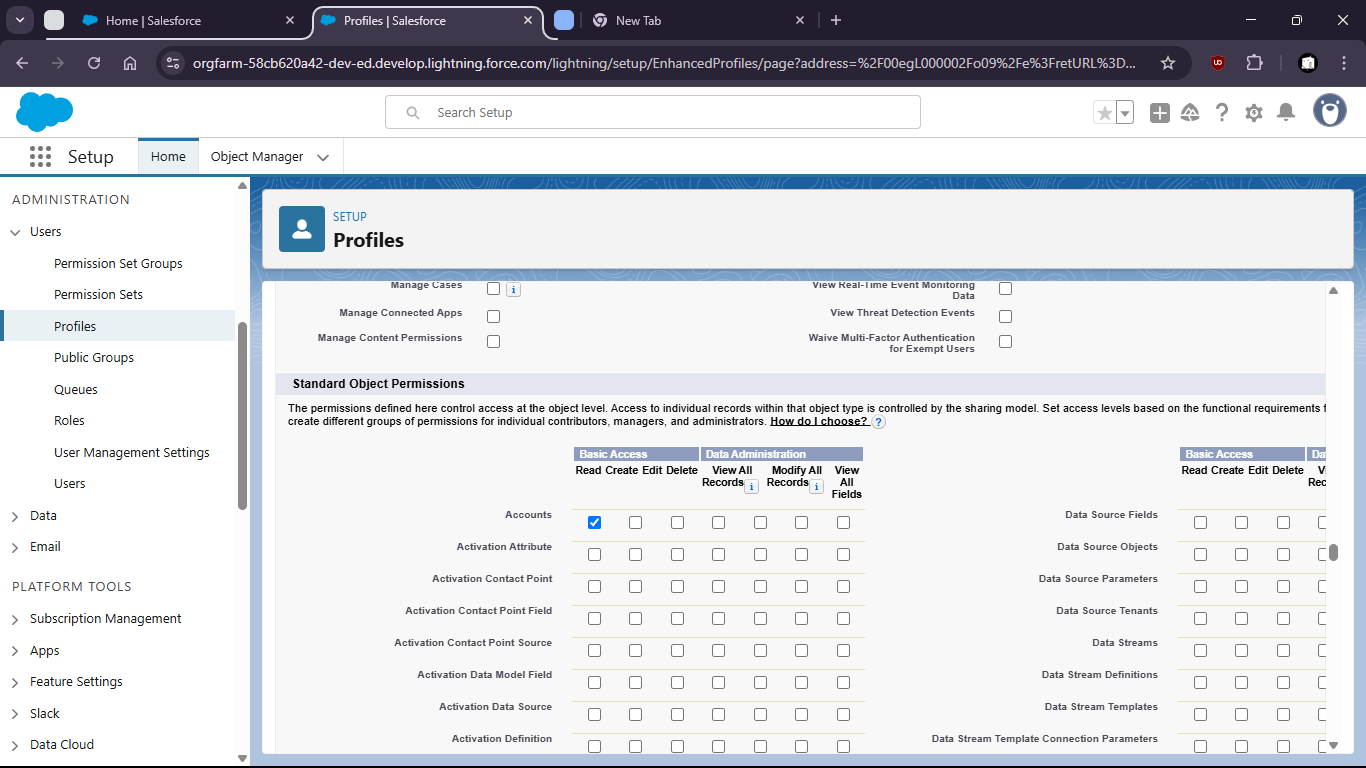


Under Account: Annual Revenue

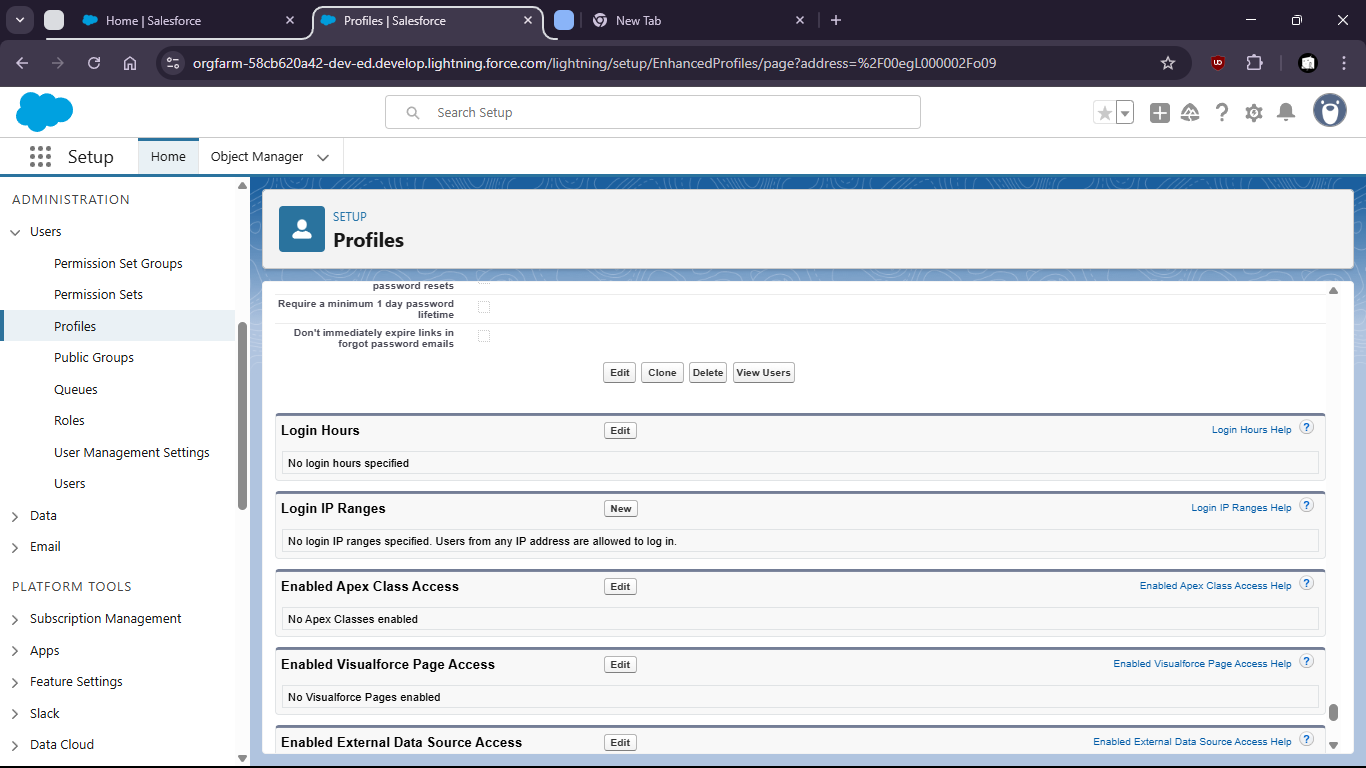


* Objects-level permissions for Service Agents

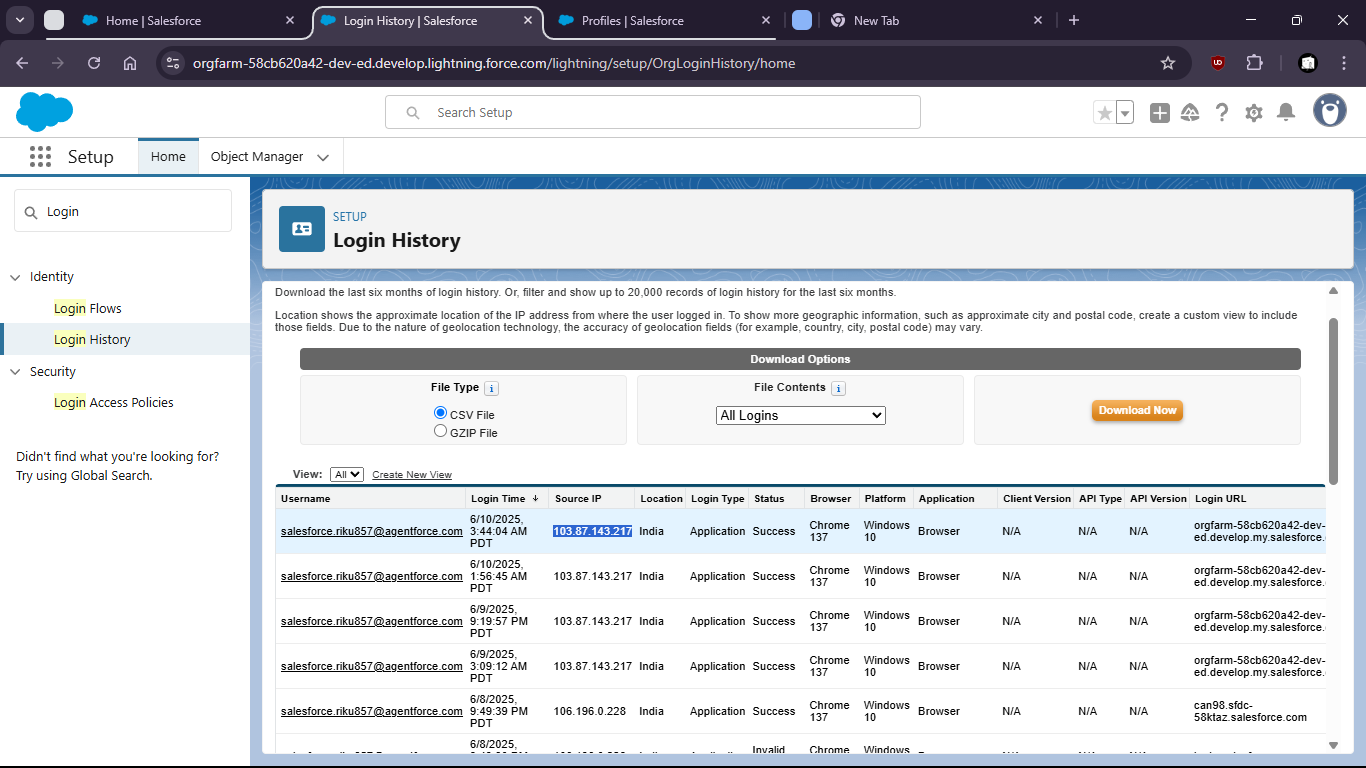
Standard object permissions



* Enable Login IP restrictions for added security



To get the ip:



now set the ip:

